



NOTICE OF ADMINISTRATION COMMITTEE MEETING August 9, 2022

Covering Policy, Administration and Community
Relations/Communications

NOTICE IS HEREBY GIVEN that the San Lorenzo Valley Water District has called a meeting of the Administration Committee to be held on **Tuesday, August 9, 2022, 1:00 p.m.**, via video/teleconference.

There will not be any physical location for this meeting. Pursuant to AB 361 and San Lorenzo Valley Water District Resolution No. 4 (21-22) this meeting will be conducted by video/teleconference. Any person in need of any reasonable modification or accommodation in order to participate in the meeting may contact the District Secretary's Office at (831) 430-4636 a minimum of 72 hours prior to the scheduled meeting. The meeting access information is as follows:

<https://global.gotomeeting.com/join/269830453>

You can also dial in using your phone.
(For supported devices, tap a one-touch number below to join instantly.)

United States (Toll Free): 1 877 309 2073
- One-touch: <tel:+18773092073,,269830453#>

United States: +1 (571) 317-3129
- One-touch: <tel:+15713173129,,269830453#>

Access Code: 269-830-453

AGENDA

1. Convene Meeting/Roll Call
2. Oral Communications

This portion of the agenda is reserved for Oral Communications by the public for items which are not on the Agenda. Please understand that California law (The Brown Act) limits what the Board can do regarding issues raised during Oral Communication. No action or discussion may occur on issues outside of those already listed on today's agenda. Any person may address the Committee at this time, on any subject that lies within the jurisdiction of the District. Normally, presentations must not exceed five (5) minutes in length, and individuals may only speak once during Oral Communications. Any Director may request that the matter be placed on a future agenda or staff may be directed to provide a brief response.

3. New Business: None

Members of the public will be given the opportunity to address each scheduled item prior to Committee action. The Chairperson of the Committee may establish a time limit for members of the public to address the Committee on agenda items.

4. Unfinished Business:

Members of the public will be given the opportunity to address each scheduled item prior to Committee action. The Chairperson of the Committee may establish a time limit for members of the public to address the Committee on agenda items.

A. REVIEW PROPOSALS FOR OUTREACH

Discussion by the Committee regarding proposals received for Outreach RFP.

B. STRATEGIC PLAN

Discussion by the Committee regarding the Strategic Plan.

5. Informational Material:

Here is a link <https://www.slvwd.com/node/286/minutes> to previous Admin Committee meeting minutes.

6. Adjournment

Agenda documents, including materials related to an item on this agenda submitted to the Committee after distribution of the agenda packet, are available for public inspection and may be reviewed at the office of the District Secretary, 13060 Highway 9, Boulder Creek, CA 95006 during normal business hours. Such documents may also be available on the District website at www.slvwd.com subject to staff's ability to post the documents before the meeting.

Certification of Posting

I hereby certify that on August 4, 2022, I posted a copy of the foregoing agenda in the outside display case at the District Office, 13060 Highway 9, Boulder Creek, California, said time being at least 72 hours in advance of the meeting of the Admin Committee of the San Lorenzo Valley Water District in compliance with California Government Code Section 54956.

Executed at Boulder Creek, California, on August 4, 2022.

Holly B. Hossack, District Secretary

To: Administrative Committee
From: District Manager
Prepared by: Environmental Programs Manager
Subject: Outreach Direction Discussion
Date: August 9, 2022

RECOMMENDATION

It is recommended that the Administrative Committee review the attached proposals for a comprehensive outreach consultant and recommend an outreach consultant to the Board of Directors.

BACKGROUND

At the February 2022 Administrative Committee meeting staff presented an update on the District's current outreach performance and planning. Follow-up discussions were had at the March and April Administrative Committee meetings resulting in a committee recommendation to the Board of Directors (BoD). The Committee discussed the importance of finding a consultant that would be capable of the following: Polishing in-house written communications, technical writing, event planning, social media posting and BMPs, determining best ways to engage customers, support staff in development of content, and represent the District professionally in both written and in-person communications, as well as meet the objectives listed below:

Outreach objectives include:

- Technical writing
- Engage and educate customers on complex/serious issues
- Avoid communications focused only on positive events/activities
- Event and workshop planning (both Zoom & in-person)
- Editing, wordsmithing, and polishing communications
- Achieving transparency and fact sharing (not selling)

The Committee recommendation included releasing an RFP for a comprehensive outreach consultant and increasing the outreach budget to \$50,000.

At the May 19th BoD meeting the Board voted to move ahead staff preparing a RFP for an outreach consultant but did not approve increasing the budget.

The Administrative Committee approved a Request for Proposals (RFP) to be released in June 2022. The RFP closed on July 28th and three proposals were received. Attached are proposals from Dudek, the Buzz PR, and Miller Maxfield, Inc, along with an evaluation sheet (optional).

EVALUATION SCORESHEET
Outreach Services 2022

Evaluator: _____

Firm: The Buzz PR

Required Information	Check (Pass/Fail)	Comments	
1. Executive Summary Include a brief overview of the specific approach proposed to meet the needs of SLVWD. Summarize the contents of the proposal in a clear and concise manner.			
2. Identification of Prime & Subconsultants			
3. Project Description Explain the objective of the project and how you propose to accomplish the goals. Describe the services and deliverables to be provided. Include a statement on what makes your company uniquely qualified.			
4. Organization and Experience of the Team Describe proposed team organization, experience of the personnel, project management approach, responsibilities, lines of communication. Describe a proposed schedule an company's capacity to perform the work within the time limitations.			
5. Experience and Past Performance Include a summary of the past experience and performance of the Project Manager. Describe the company's past experience and performance on similar projects.			
6. Creative Alternatives Discuss any creative solutions to meet the project objectives.			
7. Proposed Total Cost and Fee Schedule Proposed fee must be organized into tasks, must include an estimated timeline for completion of each task and subtask, and must include hourly rates of the all staff.			
8. Contractual Scope of Services Include a detailed scope of services to be provided and a detailed schedule showing all faces of work. Provide a certification that it has fully read the RFP and takes no exceptions. If the consultant does take exceptions, specify the portion of the RFP.			
Completeness of the Proposal (Score - 1 point for each Pass)			
Evaluation Criteria	Score (Low 1 - High 10)	Comments	Weighted Score
1. Executive Summary (20%)			
2. Identification of Prime & Subconsultants (10%)			
3. Project Organization and Experience (20%)			
4. Past Performance, Including Cost and Schedule Control (10%)			
5. Creative Alternatives (10%)			
6. Sample Attachments (10%)			
7. Proposed Fee (10%)			
8. Overall Quality of the Proposal (10%)			
Evaluation Total Weighted Score			0.00

EVALUATION SCORESHEET
Outreach Services 2022

Evaluator: _____

Firm: Miller Maxfield, Inc.

Required Information	Check (Pass/Fail)	Comments	
1. Executive Summary Include a brief overview of the specific approach proposed to meet the needs of SLVWD. Summarize the contents of the proposal in a clear and concise manner.			
2. Identification of Prime & Subconsultants			
3. Project Description Explain the objective of the project and how you propose to accomplish the goals. Describe the services and deliverables to be provided. Include a statement on what makes your company uniquely qualified.			
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5. Experience and Past Performance Include a summary of the past experience and performance of the Project Manager. Describe the company's past experience and performance on similar projects.			
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Completeness of the SOQ/Proposal (Score - 1 point for each Pass)			
Evaluation Criteria	Score (Low 1 - High 10)	Comments	Weighted Score
1. Executive Summary (20%)			
2. Identification of Prime & Subconsultants (10%)			
3. Project Organization and Experience (20%)			
4. Past Performance, Including Cost and Schedule Control (10%)			
5. Creative Alternatives (10%)			
6. Sample Attachments (10%)			
7. Proposed Fee (10%)			
8. Overall Quality of the Proposal (10%)			
Evaluation Total Weighted Score			0.00

EVALUATION SCORESHEET
Outreach Services 2022

Evaluator: _____

Firm: Dudek

Required Information	Check (Pass/Fail)	Comments	
1. Executive Summary Include a brief overview of the specific approach proposed to meet the needs of SLVWD. Summarize the contents of the proposal in a clear and concise manner.			
2. Identification of Prime & Subconsultants			
3. Project Description Explain the objective of the project and how you propose to accomplish the goals. Describe the services and deliverables to be provided. Include a statement on what makes your company uniquely qualified.			
4. Organization and Experience of the Team Describe proposed team organization, experience of the personnel, project management approach, responsibilities, lines of communication. Describe a proposed schedule an company's capacity to perform the work within the time limitations.			
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5. Creative Alternatives (10%)			
6. Sample Attachments (10%)			
7. Proposed Fee (10%)			
8. Overall Quality of the Proposal (10%)			
Evaluation Total Weighted Score			0.00



Proposal For San Lorenzo Valley Water District

Proposal For: On-Going & On-Call Outreach Consulting Services For
The San Lorenzo Valley Water District

Project Title: Communications and Community Outreach Services

Executive Summary

Firm Overview:

The Buzz is dedicated to great work and big ideas, no matter how small your organization. In these unprecedented times, agility is more essential than ever, and our group of pros is one that can think quickly and take rapid action. Whether you need help with strategic planning, online marketing, print materials, website development or public relations, we're here for you.

With multiple decades of experience combined, The Buzz PR is a single destination you can count on for all your marketing and PR needs. Don't juggle one source for your copywriting, another for on-point branded swag, and yet another for help with SEO. We offer a comprehensive suite of services and bring bold creativity to every challenge. Our team is located throughout the States, and are not only consummate pros at working remotely, but we also love it.

We're ready to hear your latest idea and can't wait to help you bring it to life. Our multi-faceted, multi-talented group can assist in fleshing out your concept, developing a brand that reflects exactly what you want to offer and whom you wish to attract as customers and clients. We can design a beautiful website for you, including ecommerce and help you market it on social media and elsewhere. We can boost your image and manage your reputation and image with our public relations expertise, and even plan a remote event to celebrate your product launch.

Methodology and Approach:

We are a full-service digital marketing, public relations, social media, and creative agency that:

1. Seeks to listen well, collaborate, understand fully, think strategically and make wise decisions.
2. We are curious and challenge prevailing assumptions to uncover innovative "above and beyond" solutions.
3. We dedicate our time and energy to making life better for our colleagues, our clients and our community.
4. We are a collaborative group of dreamers and doers
5. We combine an intimate knowledge of fundraising and education with an extensive national network to craft clever and multidisciplinary communications campaigns tailored to your unique needs.
6. By engaging The Buzz PR LLC, organizations gain access to a cultivated team of communications and marketing strategists with keen insights, established influencer relationships and the ability to surface meaningful opportunities throughout the education space — and execute on them.
7. The Buzz PR marries authentic understanding and next-gen tools to bring an organization's messages to life and share them with the world. We help find the stakeholders and decision makers organizations need and inspire action in the service of critical goals.

Our Process Overview:

We learn your business and we learn it fast. Marci will arrange a kick-off discovery meeting in your first week to learn more about your audience, products, services, and overall PR goals. You will be asked to send over necessary supporting materials such as photos, company bios, and more through Drop Box.

At The Buzz PR, we don't just send an arrow into mid-air and hope that it hits the right media target. We plan for success...quite literally. Marci will work with our team to develop a solid 90-day immediate strategy followed by a yearlong timeline and task list. Why only 90 days? Well, the market changes and moves; reactive stories arise that we will plug you into. At the end of your 90-day marketing plan, we anticipate a shift where a new plan will be necessary.

We will begin customizing contact and pitch lists for your campaign, researching new stories and media that we can immediately attack, all within the guidelines of your 90-day campaign strategy. Your strategy will include a multitude of pitch angles that we will hit the media with to ensure timely pick up.

Identification of Prime Consultant

Firm Name:

- The Buzz PR, LLC
- 1320 B Main Street, #235 Salinas, CA 93901

Organizational Capacity:

- Leadership – 2 (Marci and Sean)
- Brand and Leadership Coaching (Lesley)
- Public Relations and Technical Writers – 4 Team Members
- Social Media – 5 Team Members
- Website (Includes Design, Coders and SEO) – 5 Team Members
- Graphic Design – 3 Full Time Team Members and 2 Part Time Team Members
- Social Media – 4 Team Members
- Media Buyers – 1 Traditional Media Buyer and 1 Digital Media Buyer
- Videography, Photography, Reel Creation – 4 Team Members
- Accounting – 1 Team Member
- Account Assistants – 3 Team Members
- Total Buzz Team Members: 34 Team Members (Full Time and Part Time)
- Note: Project capacity varies between retainer projects and hourly projects. Projects are only bid and taken on if the team has capacity. The Buzz believes in work, life, balance for our team members.

Identification of Sub Consultants

The Buzz Leadership Team for San Lorenzo Valley Water District:

Marci Bracco Cain, Co-Owner, Account Lead

marci@thebuzzpr.net (831) 747-7455



Anyone who has met Marci Bracco for more than a few minutes knows she wears her passions on her sleeve - an undeniable zest for life, animal welfare and a fierce dedication to her clients and their brand. Ask any of the clients who have enlisted her services. They always know she and her team are in their corner and will champion them every step of the way. Passion. Commitment. Creativity--these are the directives for The Buzz PR, LLC team.

Marci specializes in building and creating brands. Focusing on the unique qualities of a company, an organization, a product or service and the characteristics of their audience, Marci helps them succeed in a competitive and often-crowded marketplace. She brings over 25 years of public relations and marketing experience to the table, of which she applies to all projects.

Marci runs the West Coast division of The Buzz PR, LLC.

Sean Costello, Co-Owner

Sean@thebuzzpr.net (831) 747-7455



Born in Holyoke, Massachusetts, Sean is the great-grandson of four Irish expats from counties Kerry (on his father's side) and Cork (on his mother's). Currently, he and his husband, Sean Mahon (a native Dubliner), live between New York, Connecticut and Dublin. "Growing up in Holyoke, I have always been proud of my Irish heritage and the values and work ethic it has taught me," he says. Sean's primary marketing focus is on health care, finance and high tech. He runs the East Coast division of The Buzz PR, LLC.

Support Team for San Lorenzo Valley Water District Projects:

- Marci Bracco Cain, Co-Owner would be the lead and primary point of contact.
- Additional support staff would include:

Jennifer Haraja, Senior Account Executive



Jenn is responsible for managing several accounts primarily focused in the education and non-profit sectors. She develops, launches and manages campaign work, runs several of The Buzz PR's teams, and ensures the needs of the client are met. She strategically integrates traditional Public Relations and Marketing with digital and grass

roots campaign elements for maximum client success. Jenn has been in the business for more than 20 years and worked with Marci for the past 10 years.

Mac McDonald, Lead Technical Writer



Mac has 30-plus years of experience in journalism as a writer, editor and columnist, the last 22 years as editor and writer for the Monterey County Herald's GO! entertainment and dining magazine. During that time, he also wrote a weekly music column for GO! called "Mac About Town." Mac was well-acquainted with Marci and The Buzz through the many press releases about clients and events coming across his desk at The Herald. After he left the Herald in 2014, it was a natural transition for him to write for The Buzz and its clients.

Lisa Clark, Communications Specialist



Lisa Clark has more than 20 years' experience in marketing strategy as well event planning and execution, making her a perfect fit for the team.

Lisa is no stranger to The Buzz PR, LLC., having worked in conjunction with the team on events for the past dozen years with a local company, she feels right at home with The Buzz team. Having Lisa onboard is an asset for our clients. She is able to meet with clients to review their marketing vision and bring their vision to life. Lisa is also bi-lingual and works specifically with our Latinx clients in California, Mexico and South America to ensure that marketing messages are targeted specifically to their campaign goals.

A native of Salinas, Lisa has volunteered for local non-profits and charities for over 20 years. Lisa enjoys giving back to the community in which she lives. She has served on several boards throughout the years and currently serves as the President for Salinas High Athletic Boosters.

Chris Chidlaw, Media Buyer



Chris Chidlaw, who has more than 35 years' experience in radio and television sales, management, and marketing. He specializes in media placement and creative direction that includes TV, radio, print and social media.

Chris has worked with numerous non-profits over the past 25 years, including finishing up a two-year stint as president of the Monterey County Hospitality Association and as a board member of The Rotary Club of Monterey. He also is a current member of Monterey Chamber of Commerce and the Santa Cruz Chamber of Commerce, is a past board member of the Monterey History and Art Association and the Monterey Cowboy Poetry and Music Festival.

Chris is an avid runner and golfer and is a fan of Bay Area sports teams, including the Giants, 49ers, and Warriors.

Phil Fisk, Website Developer and SEO



Phil Fisk is an expert at developing marketing strategies for clients in a variety of industries. He has more than fifteen years of marketing and branding experience encompassing both strategic planning and business analytics.

Phil approaches all projects with an emphasis on helping clients achieve their goals through a mutually beneficial partnership.

A commitment to helping clients attain their goals is Phil's driving passion. However, he also embraces the philosophy that a balance between one's work and personal life is necessary for true success. As such, Phil finds great delight in spending time with his granddaughter, Amilia, as well as long-distance and obstacle running.

Matt Miles, Digital Media Content Creator



Matt Miles - often referred to as a "Jack of All Trade". A digital media and communications expert with over 10 years in content creation and online marketing. Demonstrates proven ability to meet goals and work proactively within strict deadlines while remaining true to the project vision. Adaptable and passionate Content Creator who excels at unifying teams and leveraging superb organizational skills to accomplish impressive results.

Olivia Trinidad, Graphic Designer



Olivia Trinidad has more than a decade of graphic design experience. She has the expertise to coordinate all aspects of your project—from conceptualizing to web development, to final artwork and printing. Specialties include Graphic Design, Web Design, Interactive Presentation (Power Point and Keynote), Printing, logo /corporate identity/business collaterals, magazine/book design and layout, product catalogues, brochures, flyers, posters, outdoor ads (tarpaulin banners, streamers, billboards), consumer ads (posters, print ads, window cards), print ads (newspaper and magazine ads) and designing websites.

Assignment Organization and

Experience of the Team

The Buzz PR is known for going above and beyond in terms of client communication. This is performed regularly in email communication, reports sent in the form of PDF's, DropBox, Microsoft Office programs etc. Our references above can comment on our responsiveness and additional references may be provided upon request. For the management approach on this project, Marci would be the primary point of contact to streamline tasks; attend all meetings and coordinate all communications between The Buzz PR team and the District. Jenn Adams would be the secondary point of contact.

Marci would coordinate the projects needs with the internal team and present all final work to the District for edits and or approval. We have found in the past this streamlines communications and helps strategically complete projects. Work will be done at The Buzz PR PR Salinas office and or the District as needed.

This is the manner our team works on all projects. There is always a lead Team Manager that takes responsibility for client communication and strategy as well as keeping the timeline on task. That Team Manager handles communication to all The Buzz PR Team Members and presents final products back to the client.

Deliverables

An initial branding session, an audit of all assets will be conducted. At that time, The Buzz PR will take all findings, samples of past work and current needs listed below to develop a strategic marketing plan with a detailed 12-month timeline. The timeline will offer a proposed action items on how The Buzz PR feels the District can achieve the desired goals for each Target Audience. We do not feel we can present a detailed timeline until a branding session has taken place.

The District desires social outreach to the following key audiences:

- District Customers
- Residences, Businesses and Organizations within the SLV Watersheds
- Individuals and Groups with connections to the SLV Watersheds

Campaign Goals:

1. Increase awareness about the challenges and complexities of water management through the following objectives:
2. Editing, wordsmithing, and polishing communications
3. Engage and educate customers on complex/serious issues (not only positive events/activities)
4. Achieve transparency and fact sharing (not selling)
5. Elevate the public's awareness about water issues in the San Lorenzo Valley
6. Engage the public on the challenges and complexities of delivering reliable water to the Valley
7. Regularly update the public on District activities (capital improvement projects, grant funding, and etc.)
8. Discuss District efforts with partner agencies such as the Santa Margarita Groundwater Agency
9. Promote the efficient use of water (water conservation)

Campaign Tasks:

The proposal includes providing communication strategy and outreach services for San Lorenzo Valley Water District. The Buzz team will work directly with the San Lorenzo Valley Water District staff to coordinate and develop outreach.

Marketing will include but not be limited to:

1. Technical writing
 - Either utilizing our technical writer or working with a technical writer of the District's choice
2. District Website
 - The Buzz offers design, maintenance, updates, SEO, Pixel Codes for tracking and more
3. District Social Media Pages (Facebook, Instagram, and Twitter)
 - Building out content calendars, managing social media and analytics
4. Monthly Newsletter
 - Writing, setting up on Mail Chimp, launching and monitoring analytics
5. Press Releases
 - Developing story boards, writing press releases, working with media, working to secure articles
6. Annual reports (Customer Confidence Report, State of the District and others as needed)
 - Copy writing, graphic design, print production and more
7. Guest Articles in local publications
 - Coordinating and writing articles
8. Billing Inserts
 - Copy writing, design and printing
9. Participation in or support of local and regional events
 - Presenting ideas and coordinating outreach
10. Public surveys or opinion polls
 - Assisting with developing survey questions and launching surveys as well as presenting results
11. Media events
 - Creating invites and coordinating events
12. Event & workshop planning & facilitation (both Zoom & in-person)
13. Other media as agreed

The firm has the experience, resources and capacity to take on this project and feels it fits within our firms 18 – 24 month plans for growth. Our team is ready to take on this project effective immediately

Proposed 12-Month Schedule and Cost Schedule

Note: This is a sample timeline of phases. Once we have an audit and develop all needs we would present a final timeline.

Phase 1:

Months 1-2

- This includes putting together the outreach plan but is not limited to:
- Branding Session
- Collateral Audit
- Market Analysis
- Press release schedule
- Social Media Outreach Plan
- Collateral Schedule for the Year
- Enewsletter and Print Newsletter Schedule
- Develop a billing insert template and schedule
- Public relations plan including guest articles in newspapers
- Press conference schedule
- Audit of local and regional events to support
- Website Audit
- Outreach Schedule
- Market research in each area after the main interview is completed with the key stakeholder or team of stakeholders
- Gather up information
- Put together initial fact finding data
- Deliverables for this time period include:
- Task 1- Review existing outreach efforts and provide written report identifying areas of weakness and strengths. Develop first draft of timeline for the year after audit and branding session.

Approx. Hours: 75

Phase 2:

Months 2-4

- Finalize timeline
- Launch all marketing per timeline
- Deliverables for this time period include:
- Task 2- Develop written outreach plan with specific goals, including recommendations of best management practices and opportunities to enhance efforts.

Approx. Hours: 120

Phase 3:

Month 5- 12

- Execute marketing plan; follow timeline; launch all marketing elements; 2 meetings per month; weekly communications/reporting for marketing; monthly reporting for social media.

Approx. Hours: 320 spread over 8 months 40 hours per month

Budget

Phase 1:

- Months 1-2
- Approx. Hours: 75
- Budget: \$7,125
- Billing date: \$3,562.50 per payment (Payments Net 15)

Phase 2:

- Months 2-4
- Approx. Hours: 120
- Budget: \$11,400
- Billing date: \$5,700.00 per payment (Payments Net 15)

Phase 3:

- Month 5- 12.
- Approx. Hours: 320 spread over 8 months 40 hours per month
- Budget: \$30,400
- Billing date: \$3,800 per payment (Payments Net 15)

NOTE: Until we can review the project with the client it is difficult to estimate:

- Design Needs
- Website Design and SEO Needs
- Internal Needs
- Note: Translation costs are not included in this proposal
- **Note: This proposal can be reduced in fee or increased based off design and website needs once we learn the scope of work.**
- **Budget:**
- 515 hours per year for a total of \$48,925

This estimate does not include the cost of printing, postage, ad buys or any out of pocket costs. Client will approve all costs prior to each phase.

Experience and Past Performance, Including Proposed 12-Month Schedule and Cost Schedule

Here are some samples of yearlong marketing campaigns we manage for clients. Note: we feel these projects are similar to your request as these clients do not have an in-house marketing agency and The Buzz PR works as their full-service agency.

Alan C Martinson
Vice President of Retail
Goodwill Central Coast
Serving Santa Cruz, Monterey, and San Luis Obispo Counties
amartinson@ccgoodwill.org
Office: (831) 423-8611 x 8230
Cell: (831) 291-6513

Rena Salamacha
Chief Executive Officer
Mee Memorial Healthcare System
Phone: 831-385-7284
rsalamacha@meememorial.com

Kelly Violini, CEO
Monterey County Fair & Event Center
www.montereycountyfair.com
kelly@montereycountyfair.com
831-372-8106

Barbara L. Mitchell, MSW
Executive Director
BMitchell@interiminc.org
Interim Inc.
831.649.4522

Additional Samples can be provided upon request.

Portfolio of Related Work

The Buzz has extensive PR experience and proven success in local, regional and national public relations. We have developed relationships within the industry with journalists covering a diverse range of industries. We have access to all relevant databases to reach the audience specific to you. For years, The Buzz has been serving clients in a number of industries, including agriculture, art, writing, food and wine, health care, legal, nonprofit, professional services, real estate, retail, tourism and more. The Buzz partial client list includes:

1. Non-Profits:
 - a. Goodwill Central Coast
 - b. Community Action Board of Santa Cruz
 - c. Big Sur Health Center
 - d. Center for Community Advocacy
 - e. Hartnell College Foundation
 - f. Interim Inc.
 - g. Monterey Symphony
 - h. Monterey County Fair
 - i. And more
2. Hotels Nationally
 - a. Hyatt Hotels
 - b. Davidson Hotels
 - c. ILG
 - d. And More
 - e. Cinnamon Shore Texas
 - f. Lively Beach Texas
 - g. Sanctuary Vacation Rentals
 - h. Royal Destinations
3. Medical:
 - a. Natividad Medical Center
 - b. Mee Memorial Hospital
 - c. Salinas Valley Memorial Hospital
 - d. ARCPoint Labs
4. General Clients
 - a. ABA Architects
 - b. Hudson Martin Law Firm
 - c. Truitt and White Lumber
 - d. Truitt and Window and Doors
 - e. Coastal Roots Hospitality Restaurant Group

Firm's Local Experience

The Buzz PR has had a connection with the Santa Cruz Community since it opened for business. The firm has worked with numerous Santa Cruz clients over the past 15 years including: Santa Cruz Museum of Art and History; Goodwill Central Coast; Adrienne Momi Artist and Author; BirchBark Foundation; Lifespan; Watsonville Community Hospital; Central Coast Patent Agency; Haute Enchilada; San Lorenzo Valley Water District; Community Action Board of Santa Cruz; El Pajaro CDC; RVS Computers and more. The firm has also donated time to support Jacob's Heart and the Santa Cruz Cancer Benefit Group. Chatterbox PR is an active member of the Pajarao Chamber of Commerce.

Creative Alternatives

It is hard to provide a creative alternative to the proposed objectives and project scope without having an in person meeting and conducting research. We do not feel we would be offering a strategic alternative without a live discussion. At The Buzz PR we believe a brand/business not only creates loyal customers, but it creates loyal employees. Building your business into a brand gives your stakeholders something to believe in, something to stand behind. It helps them understand the purpose of the organization or the business. Until we have completed our initial audit and findings, we do not feel we can provide a creative alternative.

Attachments

The attachments with this proposal provide a sample of products we have produced.

We certify that we have fully read the RFQ and takes no exceptions to this RFQ including, but not limited to the Consultant Services Agreement.

Contact Information:

Marci A. Bracco Cain/The Buzz PR

1320 South Main Street

Salinas, CA 93901

E-mail: marci@thebuzzpr.net

Phone: 831-747-7455

Client Contributed Article Samples:

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https://growthzonesitesprod.azureedge.net/wp-content/uploads/sites/731/2022/06/SVBJ_July2022Final.pdf?utm_campaign=July+SVBJ

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<http://coastalgrowermag.com/wp-content/uploads/2022/05/CG-SPRING-2022.pdf>

King City Rustler

<https://kingcityrustler.com/guest-column-make-your-voice-heard-through-health-survey/>



Proposed Total Professional Fee and Fee Schedules San Lorenzo Valley Water District

Proposed Total Professional Fee Schedule

Timeline: 12-Month Period of Time

Budget

Phase 1:

- Months 1-2
- Approx. Hours: 75
- Budget: \$7,125
- Billing date: \$3,562.50 per payment (Payments Net 15)

Phase 2:

- Months 2-4
- Approx. Hours: 120
- Budget: \$11,400
- Billing date: \$5,700.00 per payment (Payments Net 15)

Phase 3:

- Month 5- 12.
- Approx. Hours: 320 spread over 8 months 40 hours per month
- Budget: \$30,400
- Billing date: \$3,800 per payment (Payments Net 15)

NOTE: Until we can review the project with the client it is difficult to estimate:

- Design Needs
- Website Design and SEO Needs
- Internal Needs
- Note: Translation costs are not included in this proposal
- **Note: This proposal can be reduced in fee or increased based off design and website needs once we learn the scope of work.**
- **Budget:**
- 515 hours per year for a total of \$48,925

This estimate does not include the cost of printing, postage, ad buys or any out of pocket costs. Client will approve all costs prior to each phase.

Project Payment Schedule:

The Buzz works with clients to break out payments in a manner that works best for them. We recommend

monthly payments so the payments are spread out over the year.

Contact Information:

Marci A. Bracco Cain/The Buzz PR

1320 B Main Street, #235 Salinas, CA 93901

E-mail: marci@thebuzzpr.net

Phone: 831-747-7455



COMMUNICATIONS AND COMMUNITY OUTREACH SERVICES

July 28, 2022

July 28, 2022

Carly Blanchard
Environmental Programs Manager
San Lorenzo Valley Water District
13060 Highway 9
Boulder Creek, CA 95006

Subject: On-Going and On-Call Outreach Services for San Lorenzo Valley Water District

Dear Ms. Blanchard:

It is a pleasure to prepare this proposal for the San Lorenzo Valley Water District (District), and we appreciate this opportunity.

Providing strategic and expert outreach consulting services to the District to increase public awareness about water management and challenges requires a knowledgeable and experienced project team that is well-versed in conducting communications, engagement, and facilitation, and generating outreach materials. The task also requires a team with knowledge and understanding of water resources.

Dudek is well-equipped to perform the following tasks under this contract:

- Develop a communications and engagement (outreach) plan and materials based on review of existing outreach efforts and understanding of the needs of the District and community.
- Plan focused and effective community workshops and community events
- Work with District staff on executing outreach strategy
- Coordinate media inquiries or responses

Our expert project team brings the following advantages to the San Lorenzo Valley Water District:

Communication, Engagement, and Facilitation. Inclusive and effective communication is vital to successful projects. Efficient and transparent facilitation engenders trust and provides opportunities for consensus building in process-related projects and successful outcomes. Dudek staff are experienced in culturally sensitive, language-appropriate communication, engagement, and facilitation services. We are skilled in bringing people together to address concerns and hear suggestions from multiple stakeholder groups to define and refine goals, coalesce around common purposes, and prepare and implement strategies. Our team members ensure that communication materials are visually appealing, clear, informative, and tailored to meet our target audiences. We meet people where they are to derive the common goals of the those engaged and our clients.

Focus on Water Issues. Dudek has worked with agencies and municipalities to address engineering and environmental issues related to water in the Central Coast and throughout California for more than 40 years.

DUDEK AT A GLANCE



Multidisciplinary environmental and engineering services, including communications and engagement

12
CALIFORNIA
OFFICES
(including Santa Cruz)

42
YEARS IN
BUSINESS

EMPLOYEE-OWNED

700+
EMPLOYEES

TOP 120
U.S. ENVIRONMENTAL
FIRMS (Engineering News-Record)

MORE THAN **180** ON-CALL CONTRACTS
THROUGHOUT CALIFORNIA

We are a California-based environmental and engineering consulting firm that understands the unique role that water plays in the lives of people in the and in the state, and in the Central Coast and East Bay. With offices in Santa Cruz, Santa Barbara, and Oakland, we have assisted clients on a wide range of water management projects, including public communication and engagement, that enhance infrastructure, communities, and the natural environment.

In-House Creative Design and Publications Services. Our in-house creative design staff's experience covers a broad range of mediums for public water agencies while practicing our firm's universal design focus: to craft visual stories that cut through complex topics and deliver clear, understandable messages that resonate with both expert and non-expert audiences. Our in-house publications staff specializes in finalizing complex technical publications and outreach material to successfully convey project goals, objectives, and information to the targeted audience.

Deep Bench of Available and Engaged Resource Experts. We take pride in our open culture, flat structure, and operational flexibility. Our project managers can nimbly assign staff and can quickly acquire the necessary resources to get projects done. This efficient and supportive environment results in high employee retention that ensures that the intellectual resources within a team stay intact for the duration of a project.

Dudek appreciates the opportunity to propose on this project and welcomes further discussion of our qualifications. Should you have any questions, please do not hesitate to reach out to Project Manager **Jane Gray** at 805.308.8531 or jgray@dudek.com.

Sincerely,



Joseph Monaco

President/ CEO



Jane Gray

Project Manager

**Joseph Monaco is authorized to sign on behalf of Dudek. Dudek certifies that it has fully read the RFQ and takes no exceptions to this RFQ including, but not limited to the Consultant Services Agreement.*

1

Executive Summary

1 Executive Summary

DUDEK

605 Third Street, Encinitas, CA 92024

Contact: Jane Gray

Email: jgray@dudek.com

Phone: 805.308.8531

Expert Communication, Engagement, and Facilitation Services

Dudek communication and engagement experts use a robust outreach and engagement strategy that involves developing and cultivating productive, professional relationships with the public and partner agencies by facilitating meetings and workshops; involving the public early (so public viewpoints can be incorporated into decision-making processes); creating and implementing outreach and engagement plans; maintaining ongoing communication with the public through press releases, monthly newsletters, and social media posts; and defining the nature, scope, and expected and actual output of public participation activities.

INCREASING AWARENESS OF WATER MANAGEMENT AND CHALLENGES THROUGH OUTREACH

Increasing awareness and being effective requires that one understands the audience and the message. Dudek staff understands water resources, particularly the management of water resources for smaller, more rural water districts, such as the San Lorenzo Valley Water District (District). We also understand that communities have established beliefs and relations with the water resources in their communities and the water purveyors. Messaging and managing resources is complex and challenging, particularly when there are competing priorities. To successfully engage and educate the public about water use and management, drought, and conservation within their communities, water districts must develop effective and compelling materials that will inform and change behavior. Dudek supports water districts in meeting their project goals by providing expert and tailored communication and outreach tools, structured engagement, and facilitators who are uniquely poised in discussing water resources management topics and skilled in building consensus and guiding group processes.

Our staff will work with District staff to develop custom outreach materials, such as flyers, surveys, graphics, and messaging. We will support the District in the placement and distribution of messaging and materials that will reach the intended audience in the way the community is comfortable with receiving information.

SOCIAL MEDIA POWERS MODERN PUBLIC OUTREACH

Engaging and informing the community about their local water sources and changing one's relationship and attitudes towards water use is critical to meeting the District's goal of increasing awareness about the challenges and complexities of water management. Dudek understands the power of adding social media to traditional public outreach strategies and is equipped to increase the reach and results of project outreach.

We understand that the District has a NextDoor account and will utilize this platform to maximize messaging and outreach. We will prepare cogent and creative messages to communication with the District's water users. Should the District want to expand their social media presence, our specialists will support the District in creating profiles and generating and curating content and messaging across numerous social media channels, including Facebook, Instagram, and Twitter. Each social platform includes robust capabilities, and is uniquely suited to convey information and engage the public in various ways:

- **Facebook** is used to post photo albums that show capital improvement projects' progress from start to finish and display maps or figures. Invitations to outreach events can be created, with a simple interface to RSVP and interact with the public before and after events. The discussion functionality can be leveraged to encourage dialogue, interaction, and idea sharing.
- **Instagram** is used to engage viewers with compelling visual content that quickly conveys the intended message, whether explaining a complex water resources/management process or promoting water conservation or a public workshop.
- **Twitter** is used to link to relevant content, such as press releases, monthly newsletters, annual reports, articles, and public surveys, as well as for concisely conveying District activities and workshop information.

Our team utilizes the analytics capabilities of these platforms to track engagement across social channels, encouraging an adaptive public outreach approach. This allows our specialists to gauge the effectiveness of the outreach process, as well as nimbly make adjustments in real time to improve stakeholder engagement.

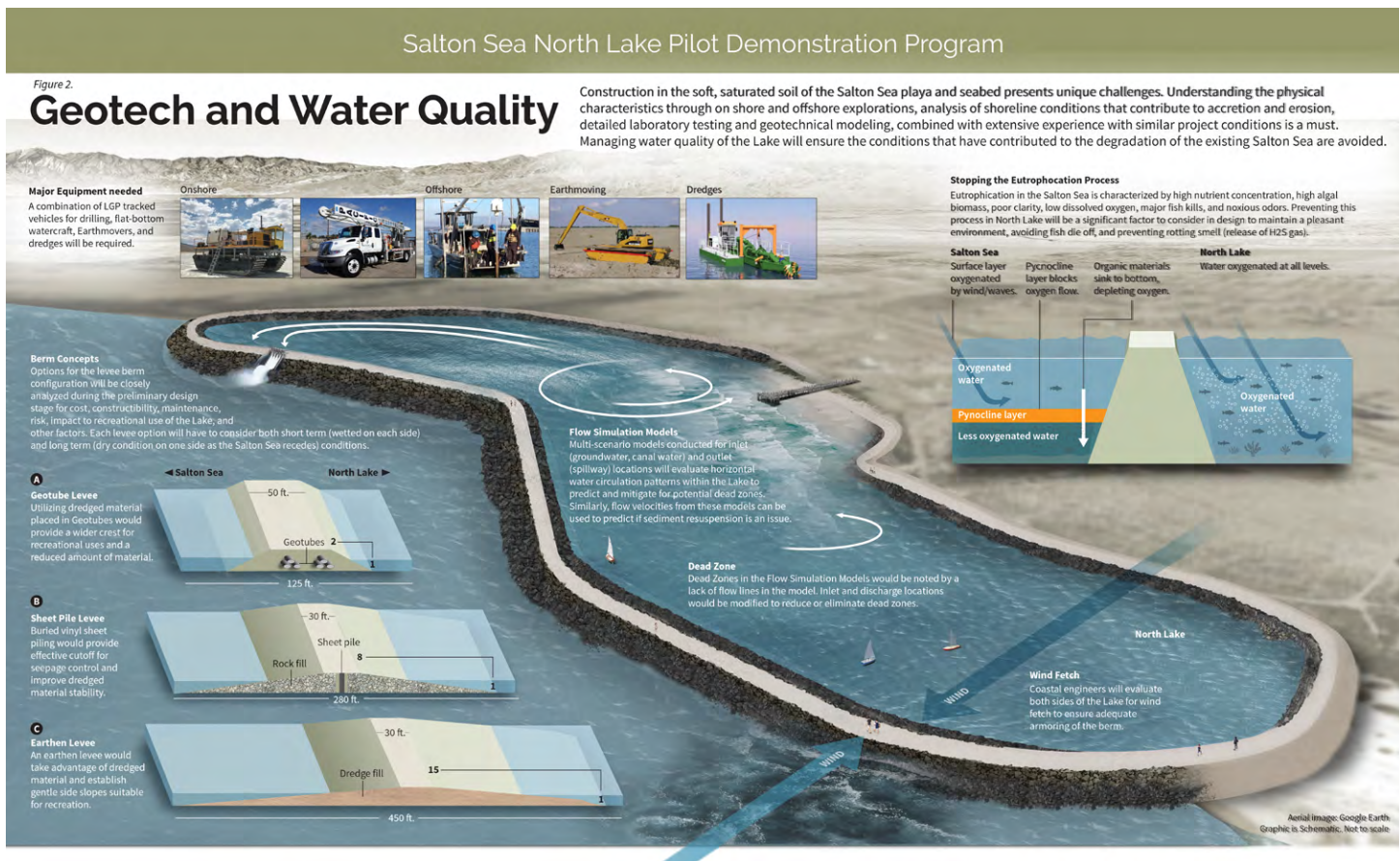
In-House Creative Services and Publications Services

Our in-house technical storytelling and creative services staff specializes in creating easy-to-understand renderings of complex systems and processes. Our staff has extensive experience in providing engaging design and visual communications that translate technical subjects like water systems and management to effective marketing messages. Using the latest technologies to create customized digital illustrations and simulations, our staff will transform the District's visions in a way that informs and assists the public and interested stakeholders in evaluating projects and understanding technical, complex information. Our staff designs PowerPoint presentations, infographics, and outreach material that are customized to the District's unique brand to provide a seamless experience for public outreach. Our in-house technical storytelling and creative services staff work products include the following:

- **Social Media Graphics** can be tailored to maintain clients' existing design elements to maintain continuity with other outreach efforts. Through concise messaging and easily navigable links, we can convey key information while inviting the public to access additional resources and provide feedback.

- **Print Design** include large multi-page publication layouts, brochures, flyers, large-scale banners and posters, logos and branding, and custom illustrations that communicate complex narratives that are both visually compelling and deliver a key message.
- **Infographics** often involve 3D renderings, photo-realistic elements, and animation to communicate complex ideas and immerse the audience in the information and deliver it in a concise and compelling way.
- **3D Renderings and Simulations** use existing photographs as backgrounds while incorporating planned projects. These simulations can be included in technical reports and marketing and public outreach material.

Our technical publications staff specializes in complete document solutions, finalizing complex technical publications and outreach material under tight deadlines. Our staff has worked on many sensitive and controversial projects, and our editors and publications specialists understand the importance of preparing robust and consistent responses to comments. Our in-house publications team uses document management, checks for consistency, proofreads and copyedits, formats, and reviews document accessibility to successfully provide error-free outreach material and technical documents.



2

Identification of Prime Consultant

2 Identification of Prime Consultant

Dudek is a California-based environmental and engineering consulting firm with offices nationwide staffed by more than 700 planners, scientists, civil engineers, contractors, and technical experts. We help our clients address challenges related to infrastructure, planning, and the environment to drive project progress and create lasting results.

With analyses based in science and ethics, Dudek offers solutions that encompass the project lifecycle and anticipate future needs. Our professionals find practical, cost-effective approaches to help you achieve your project-specific and overall goals. We work to build your trust, which allows us to offer constructive and durable project solutions.

Our depth and breadth of experience means we can quickly assemble and mobilize the appropriate level of service to match your project needs and budget. Our 700+ person in-house team includes the following:

- AICP-certified environmental planners
- CDFW- and USFWS-permitted biologists
- Registered professional archaeologists
- Registered landscape architects
- Registered environmental assessors
- Certified arborists and foresters
- Professional foresters
- Noise and air quality specialists
- Accredited LEED professionals
- Certified GIS professionals
- Licensed hydrogeologists
- Licensed geologists
- Licensed professional engineers
- Licensed contractors

Table 1. Dudek Firm Profile

Legal name and address of the company	Dudek 605 Third Street Encinitas, California 92024
Legal form of company (partnership, corporation)	California Corporation
If company is wholly owned subsidiary of a “parent company,” identify the “parent company”	Not applicable
Name, title, address, and telephone number of person to contact concerning the Response Submittal	Jane Gray, Project Manager 621 Chapala Street Santa Barbara, California 93101 805.308.8531
Number of staff and the discipline/job title of each	Total Staff: 791 Administrative: 101 Archaeologists: 153 Biologists: 118 Civil Engineers: 64 Construction Managers: 11 Environmental Scientists: 51 GIS Specialists: 47 Hydrologists: 32 Landscape Architects: 16 Planners: 24 Project Managers: 125 Technical/Analysts: 49

3

Identification of Subconsultants

3 Identification of Subconsultants

While we don't anticipate using any subconsultants on this contract, as Dudek can handle all services completely in house; however, we are open to teaming with any Disadvantaged Business Enterprise partners if the District requires us to do so.

4

Assignment Organization and Experience of the Team

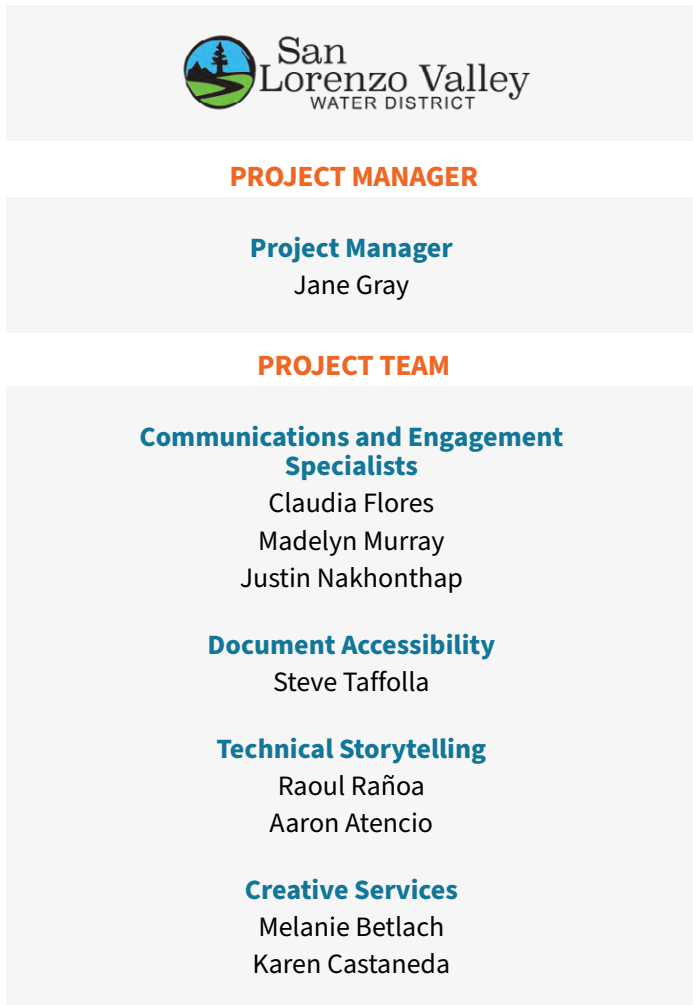
4 Assignment Organization and Experience of the Team

Team Organization

The team assembled for this project has the deep technical, communication, engagement, and outreach skills as well as the creative expertise to perform the work and achieve success. Our team members are agile problem solvers, with the ability to make decisions in a timely fashion to maintain project momentum and to meet the needs of those we serve. We are proud of our low employee turnover; our staff’s long tenure demonstrates our dedication to the projects we work on and the long-standing relationship we have in the places we live and work.

Figure 1 outlines proposed lines of communication for this contract, followed by brief biographies for key personnel. Focused resumes are provided in **Appendix A**.

Figure 1. Dudek Team Organization



Our Team

Project Manager Jane Gray is a regional planner who leverages more than two decades of project management experience. She has demonstrated competence with large, small, high-profile, complex, stakeholder-driven projects and programs, as well as demanding schedules and deliverables, particularly in the water sector. She has the communication and organizational acumen required to work with many types of personalities; and the technical aptitude and fluency in water resources in various community types in California. Ms. Gray brings an effective and customized approach to efficiently deliver services. Her ability to skillfully negotiate the often-disparate interests involved in complex projects and bring about consensus is an asset in any situation.

Ms. Gray’s team is a tightly-knit group with extensive experience conducting effective and meaningful public communication and engagement and facilitating sustained efforts for water agencies and districts. With demonstrated expertise in water management issues, developing outreach material, conducting outreach, and facilitating workshops, the team can communicate with diverse groups toward the successful attainment of the District’s goals. Our team members understand complex, technical water resources concepts and can convey these concepts in a more digestible format to the public.

Management Approach

SENIOR TECHNICAL OVERSIGHT AND ADMINISTRATIVE MANAGEMENT

Dudek’s quality assurance/quality control (QA/QC) program consists of senior staff oversight and administrative management. We are committed to engaging in clear communication and cooperation with the District, holding regular conference calls and preparing agendas to assist teams in clarifying any issues and proceeding with the work in a unified manner. We use “check-in meetings” with our project teams to allocate resources properly and according to the District’s schedule constraints. When working on several concurrent projects, we identify areas where information sharing can reduce the time, budget, or work needed to produce deliverables.

CONTINUOUS COMMUNICATION

Project Manager Jane Gray places a high priority on a continuous flow of information, data, instructions, and guidance. She will maintain regular communication with the District by:

- Serving as the single point of contact
- Scheduling regular calls and check-ins with the District’s key contact to discuss milestones, activities, and potential issues
- Holding regular project management meetings with key staff (including other consultants, as applicable) to coordinate work efforts, monitor task completion, and review budget conformance
- Updating, as necessary, the project description, schedule, work progress reports, and inventories of available data so all team members are aware of information that may affect their work products and schedules
- Coordinating with District staff at strategic junctures for public input

COST AND SCHEDULE CONTROL

Dudek has a reputation for consistently delivering projects on time and within budget. We rise to the challenges of meeting tight timelines and, in doing so, have developed an expertise in critical path management, fast-track scheduling, efficient staffing, and workload management. We have achieved this record of on-time performance through the

consistent application of several fundamental strategies. These strategies include early identification of methodologies to be used, determination of existing issues, implementation of an interactive process, and use of consistently applied administrative systems.

Using the latest available digital project management systems, we maintain accurate, up-to-date budgets and schedules. We can share cost and schedule details with the District in real time by efficiently and accurately tracking budgets and regularly updating project schedules. Ms. Gray will provide regular status updates to the District that identify work completed, work underway, and any needs for project data or information.

DOCUMENT CONTROL

Dudek’s QA/QC program involves senior staff review of technical documents combined with the services of a technical editor and publications department to produce high-quality documents done right the first time. Our in-house staff review work products for completeness, accuracy, and coordination in accordance with internal QA/QC guidelines.

At the outset of the project, the Dudek technical editing team will create a project-specific style guide to maintain consistency of the terms and nomenclature used in project documents. Dudek will share this style guide with the District to verify that it meets the District’s expectations for style and terms. Written work products will be subject to a technical editorial review following the agreed-upon style guide and will be formatted by our publications staff.

Proposed Schedule

Table 2. 12 Month Work Plan

Month	Action	Dudek’s Tests
1	Audit Existing Outreach Plan	Dudek will thoroughly review existing outreach efforts and plans and summarize areas of improvement.
2-4	Create Communication and Engagement Plan (CEP)	Based on Dudek’s findings, the team will create a District-specific CEP as a guidance tool for outreach.
4	Execute CEP	Dudek will work with staff to execute the approved CEP
4-5	Develop Outreach Style Templates	Dudek’s team of outreach specialists and our graphics department will work with the District to curate a style guide and template for outreach materials.
4-12	Memos and Meetings	Dudek will prepare monthly committee memos and attend monthly Administration Committee meetings to provide updates and receive feedback. In addition, Dudek will maintain consistent contact through regular meetings with the District.
4-12	Media Coordination	Media outreach and coordination will occur as needed to implement the CEP.
5-12	Produce Regular Outreach Materials	Utilizing the CEP guidance and curated style guide, Dudek will produce a minimum of monthly newsletters, regular website updates, and various social media posts and announcements as needed.

Staff Workload and Availability

The Dudek team specifically chosen for this contract has the availability and capacity to provide on-going and on-call outreach services for the District. Ms. Gray has relevant, local project management experience and will make this contract a top priority. In addition, Dudek offers the District a team of accessible, committed staff members who are ready to begin work immediately.

The Dudek team presented in this proposal is fully committed and available for this contract. With current workloads ranging from 50% to 80%, our selected team will promptly proceed with any on-going or on-call task order from the District. Team members can commit substantial effort (up to 100%) to the task when it is necessary for the success of a project.

Dudek has the capacity to attend meetings, advise District staff, prepare and present outreach material, and assist with any task

as it pertains to the scope of services. Other Dudek staff may also support the District’s project and will be assigned when necessary.

Our team includes a wide range of subject matter experts with different specialties to accommodate the specific outreach needs of the District. We have a flat internal structure, meaning that our deep bench of senior staff, skilled managers, technical experts, and practitioners are available to support Ms. Gray. Internally, Dudek focuses on hiring and retaining the most qualified specialists by taking care of our professionals. As a result, we have low staff turnover and high career longevity, providing the District with a team that will stay with this contract throughout its lifespan.

Dudek personnel will be committed to the contract and no substitution of team members will be made without prior approval from the District.



5

Experience and Past Performance

5 Experience and Past Performance

CALIFORNIA DEPARTMENT OF WATER RESOURCES COMMUNICATION, ENGAGEMENT, FACILITATION, AND TECHNICAL ASSISTANCE

Client: California Department of Water Resources

Reference: Kelley List, Senior Engineering Geologist;
916.653.9827; kelley.list@water.ca.gov

Contract Amount: \$2,378,066

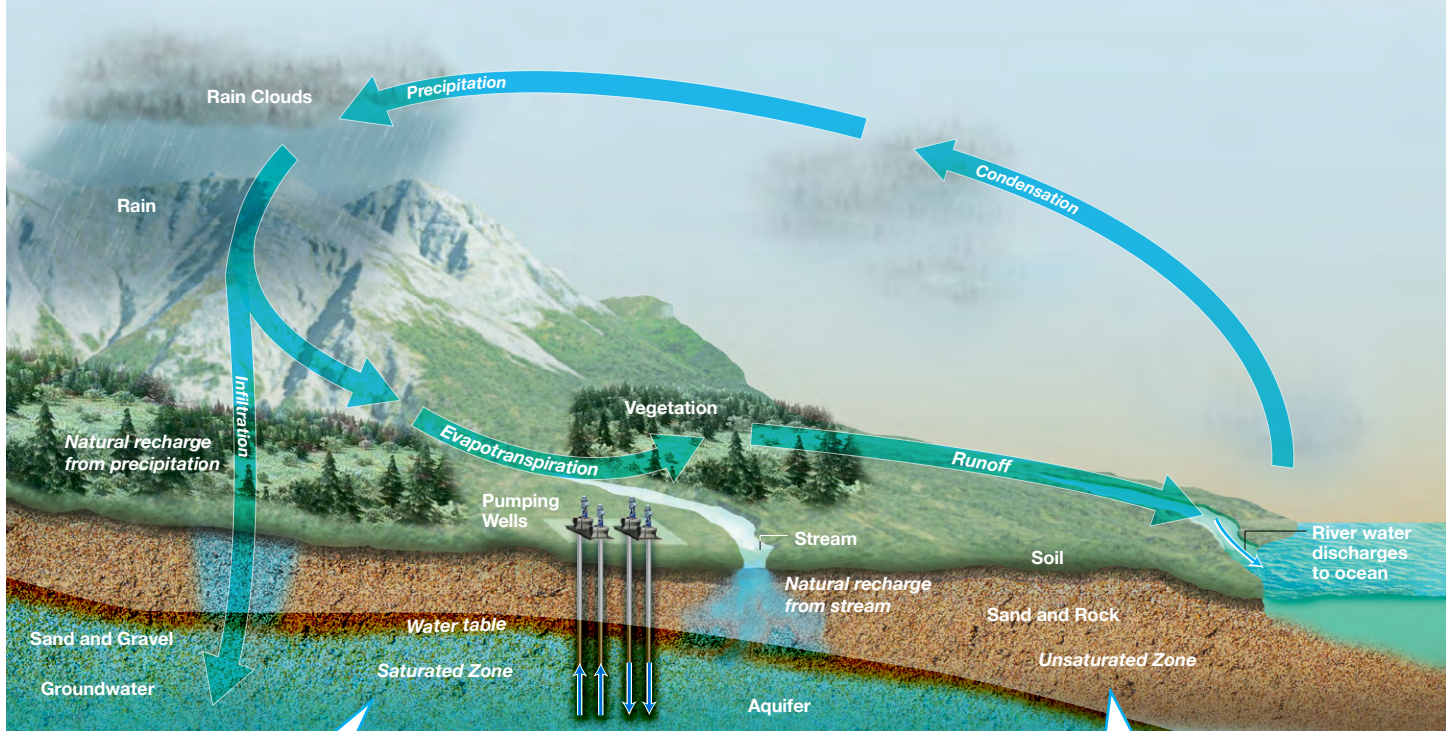
Period of Performance: 2021–Ongoing

Dudek is providing eligible needs, risk, and vulnerability assessments, culturally sensitive community outreach and engagement to prioritized Tribal governments and underrepresented Communities, and technical engineering services for The California Department of Water Resources (DWR) Technical Assistance Program (Program) to ensure water supply and water quality equity. Our outreach and engagement work includes the following:

- Identifying, prioritizing, and mapping the Tribal governments, Tribal communities, and underrepresented communities that need support
- Educating these communities on Sustainable Groundwater Management Act (SGMA) and the role of their local groundwater sustainability agencies (GSAs)
- Assessing the needs, risks, and vulnerabilities of water systems in Tribal governments, Tribal communities, and underrepresented communities in SGMA-regulated basins, and sharing these outcomes with GSAs to facilitate coordination and dialogue
- Providing technical assistance services and support for actionable engineering and hydrological projects/ programmatic solutions that support water resilience and water equity.

Groundwater within the Hydrologic cycle

Groundwater is replenished by rain or snow, depending on the local climate and geology. When rain falls or snow melts, some of the water evaporates, some is transpired by plants, some flows overland and collects in streams, and some infiltrates into the pores or cracks of the soil and rocks.



The **saturated zone** is a key player in the Earth's hydrologic cycle. Saturated zones beneath the land surface are where groundwater is. The upper surface of the saturated zone is called the **water table**.

The first water that enters the **soil** replaces water that has been evaporated or used by plants during a preceding dry period. Between the land surface and the **aquifer** water is a zone that hydrologists call the **unsaturated zone**. In this unsaturated zone, there usually is at least a little water, mostly in smaller openings of the soil and rock; the larger openings usually contain air instead of water.

Identifying Communities in Need of Support

The Program defines Tribes and Tribal communities as those listed on the Native American Heritage Commission (NAHC) tribal consultation list. Underrepresented communities include the following:

- Disadvantaged and severely disadvantaged communities (i.e., those with a median household income [MHI] that is less than 80% and less than 60% of statewide MHI, respectively)
- Private domestic well owners
- Small farmers, growers, and community systems
- Members of fringe communities and other communities scored with CalEnviroScreen 4.0
- Communities identified through the Human Right to Water portal

Dudek contacted GSAs, community services districts, water districts, cities, counties, planning divisions, environmental health services divisions, NGOs, and all NAHC list contacts via phone, email, and mail to provide information on the Program and discern water system needs. Outreach specialists also collected information on income, water accessibility, quantity, and quality, and groundwater basin information.

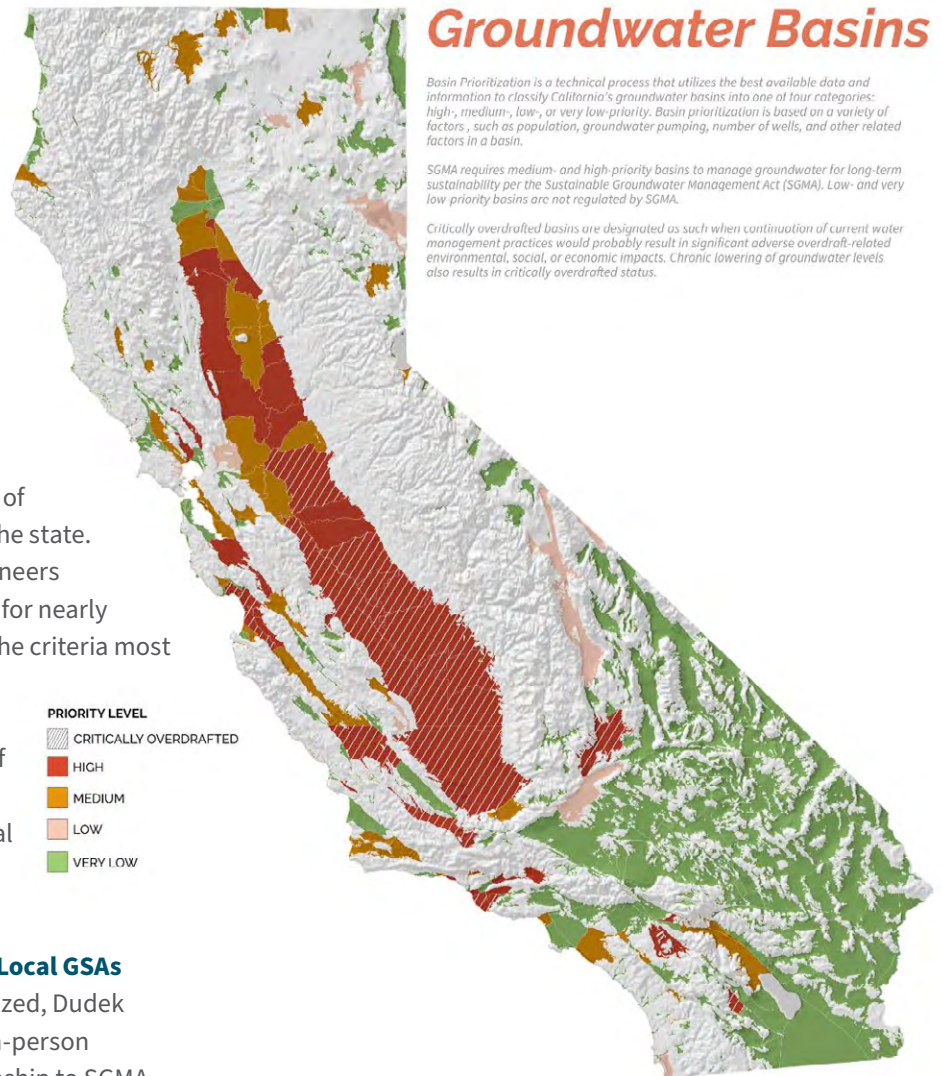
As part of the identification and prioritization process, Dudek collected and combined data from over a dozen sources to evaluate the hydrogeological and ethnographic setting of communities and water systems throughout the state. Using this data, Dudek programmers and engineers developed a customized database that allows for nearly instantaneous adjustment and evaluation of the criteria most indicative of community needs. Among the many water equity criteria considered are threats to surface water, health and viability of groundwater resources, ability to comply with state water quality standards, and the financial well-being of the communities and water systems under consideration.

Educating Communities on SGMA and their Local GSAs

Once communities were identified and prioritized, Dudek worked with community leaders to convene in-person workshops to discuss the Program, its relationship to SGMA, and the roles and responsibilities of the GSA governing their

geographic area. This provided an opportunity for more collaboration between GSAs and identified communities.

Additionally, our graphic design and media production teams crafted and implemented custom branding, including logos, colors, and iconography for all communications, including handouts, flyers, posters, project study areas (PSAs), social media posts, and videos. The videos and PSAs were prepared to reach speakers of multiple languages, including English, Spanish, Tagalog, and Traditional and Simplified Chinese, Hmong, and Mixteco (Alto and Bajo). Videos were developed with input from native speakers to ensure culturally sensitive coloration and iconography as well as Americans-with Disabilities-Act-compliant animations to ensure accessibility.



Assessing Community Needs, Risks, and Vulnerabilities

Following education on SGMA and groundwater issues, we are continuing outreach to assess communities' water needs within SGMA-designated basins. Our staff is hosting workshops, as well as publishing public notices, social media posts, informational materials, and radio advertisements. Dudek archaeologists, ethnographers, and cultural resources experts are skilled in tribal outreach and engagement. Our experts leverage the trusted relationships they have built with tribal entities and elders throughout the state to facilitate productive tribal engagement as it relates to needs assessment.

Providing Technical Services and Support for Community Projects that Support Water Equity

The goal of all outreach and engagement activities is to provide awareness of the Program; to conduct needs, risks, and vulnerability assessments in prioritized communities; and provide technical, hydrology, and engineering services to Tribal governments, Tribal communities, and underrepresented communities within SGMA-regulated basins. The information from the needs, risk, and vulnerability assessments, as well as community surveying, inform Dudek's support of the development of fundable projects that will position communities for climate and water resiliency and expand water equity. Moreover, the Program will provide opportunities for

relationship and capacity building between GSAs and Tribal governments and communities, as well as underrepresented communities.

Dudek is working with DWR on outreach, communication, engagement, and facilitation with GSAs, Tribal governments, and underrepresented communities. The work also includes the development and implementation of water-system-related need, risk, and vulnerabilities' assessments. Once systems are assessed and evaluated, Dudek will conduct focused technical assistance. Dudek is also preparing a series of regional and statewide heat maps for the prioritized underrepresented communities and Tribal governments. Finally, Dudek is preparing water conservation curriculum for K-12 classrooms. This is a project that entails the preparation and dissemination of materials in seven languages, and workshops will be conducted in up to seven languages.

Deliverables:

- Communication and engagement plans (English and Spanish), multilingual water needs assessments and surveys, presentations, meeting materials, specialty graphics, educational materials, heat maps, water use assessment outcomes, technical memoranda, multilingual videos, fact sheets, and flyers.

DEPARTMENT OF WATER RESOURCES
SGMA Underrepresented Community Technical Assistance Program

The Underrepresented Community (URC) Technical Assistance Program (TA Program) purpose is to identify the needs, risks, and vulnerabilities with respect to the implementation of the Sustainable Groundwater Management Act (SGMA) for eligible communities as identified by the maps developed by Dudek for the Department of Water Resources (DWR). Tribes, Tribal Communities, and Underrepresented Communities have not historically been included in decision-making processes. For the purposes of this Program, Tribes and Tribal Communities include federally recognized Native American Tribes and California State Native Tribes listed on the Native American Heritage Commission's (NAHCO) California Tribal Consultation List and are collectively referred to herein as "Tribe" or "Tribes." Underrepresented Communities include disadvantaged communities (DACs) where median household income (MHI) is less than 80% of the statewide MHI, severely disadvantaged communities (SDACs) where the MHI is less than 80% of the statewide MHI, private domestic well owners, small farmers and/or small growers, and members of fringe communities. DACs, SDACs, economically distressed areas, Tribes, environmentally disadvantaged communities, and fringe communities will collectively be referred to as Underrepresented Communities. The TA Program began with a contract with Dudek to provide a wide array of assistance to DWR in developing the TA Program, identifying communities in the greatest need, developing outreach materials, and providing preliminary reports for those top communities in need. The TA Program is anticipated to provide ongoing assistance through various funding and technical assistance providers.

Tribal Land
 Tribal Land of California

Underrepresented Communities
 Disadvantaged Communities
 Severely Disadvantaged Communities

Geographic Boundaries of the Program
 Northern California
 Central California
 Central Coast

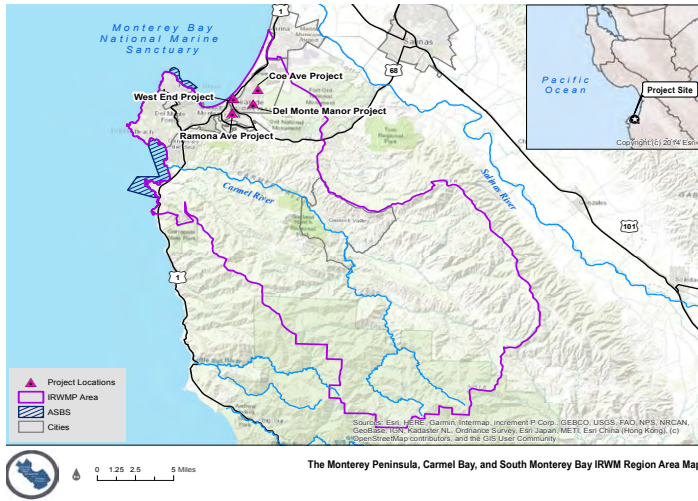
Community Outreach
 Provide Educational Materials to Tribal Government and Underrepresented Communities

Community Mapping and Prioritization
 Maps that illustrate prioritized areas within California have been prepared and included in the Underrepresented Communities section of the Sustainable Groundwater Management Grant Program website (<https://water.ca.gov/sgmgrants/>).
 These "heat maps" show regions of the state from lowest to highest priority represented by a color scale that ranges from gray to purple. Additional maps that illustrate various information collected for the Program have also been prepared.

Community Workshops
 Assess groundwater related needs, risks and vulnerabilities in Tribal Communities and Underrepresented Communities.

Technical Assistance
 Provide Technical Assistance in the form of preliminary engineering reports to address needs, risks and vulnerabilities.

MONTEREY PENINSULA WATERSHED MANAGEMENT DISTRICT INTEGRATED REGIONAL WATER MANAGEMENT ROUND 1 IMPLEMENTATION GRANT



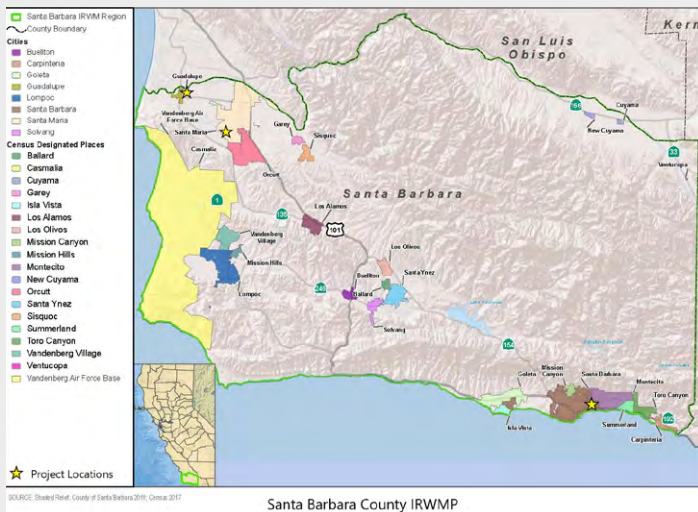
Dudek provided extensive stakeholder coordination and technical grant writing for three regional projects in the Monterey Peninsula Integrated Regional Water Management (IRWM) region, all in Disadvantaged Communities through the region’s IRWM program. The application was submitted to DWR on December 20, 2019, and was awarded in full in May 2020. Dudek has continued supporting the region through administration of the grant, including meeting facilitation, content development and review, and regular communication with the various project partners.

Deliverables:

- Project tracking sheet, draft grant application, and final grant application.

Client: Monterey Peninsula Watershed Management District
Reference: Maureen Hamilton, Water Resources Manager; 831.242.0109, mhamilton@mpwmd.net
Contract Amount: \$114,960
Period of Performance: April 2021–Ongoing (42 months)

IRWM PROGRAM FACILITATION AND MANAGEMENT

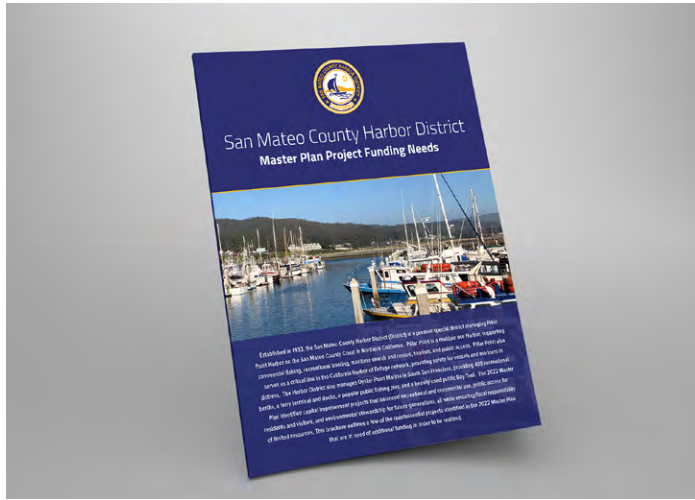


Ms. Gray has led the IRWM Program, including communication, engagement, and facilitation for the Santa Barbara County IRWM since 2014 and has been part of the project team since 2008. Her program management responsibilities include the organization and content development of monthly meetings for the Regional Water Management Group, coordination and content development for watershed meetings, coordination of guest speakers, Disadvantaged Community Involvement (DACI) grant implementation and DACI facilitation, meeting and workshop facilitation, public and stakeholder outreach, staying abreast of legislation, working with the Bond Coalition and the Roundtable of Regions, coordination with the Central Coast Funding Area (CCFA) partners in conformance with the CCFA Memorandum Of Agreement, IRWM Plan and Program visioning and implementation, website update coordination, and maintenance of project database and updating.

Deliverables:

- Monthly meeting facilitation and generation of materials, implementation of the 2019 IRWM Plan, cultivation of new members and stakeholders, generation of public outreach lists, media contact list, meetings and workshop materials and presentations, and meeting agenda.

SAN MATEO COUNTY HARBOR DISTRICT MASTER PLAN DEVELOPMENT



Client: San Mateo County Harbor District
Reference: Jim Pruett, General Manager; 650.583.4400; jpruett@smharbor.com
Contract Amount: \$348,281
Period of Performance: 2020–2022 (18 months)

Dudek worked with the San Mateo County Harbor District staff for the development of a comprehensive and implementable planning document. The project entailed development of a Communication and Engagement Plan (CEP); stakeholder survey; pop-up events; outreach, communication, and engagement of public and private stakeholders, adjacent cities, San Mateo County, state, and local agencies; and meeting facilitation. The team also provided technical and infrastructure surveys and the development of a comprehensive plan to guide future capital improvement projects, development of land and water under the District’s jurisdiction, resolve existing land use conflicts, and identify future physical improvements and opportunities for new District activities. Dudek’s approach to the scope of work centers around two components: effective project management and integrated public and stakeholder communication, engagement, and consensus.

Deliverables:

- CEP; surveys for the Pillar Point Harbor and Oyster Point Marina; individual and community interviews with community leaders, elected official, non-governmental organizations, City and County staff members, and members of the public; flyers; social media posts; PowerPoint presentations; technical memoranda; and Draft and Final Master Plan development.

SANTA YNEZ RIVER VALLEY GROUNDWATER BASIN GROUNDWATER SUSTAINABILITY PLAN

Dudek worked with Stetson Engineers and the Santa Ynez River Water Conservation District staff alongside GSA members to prepare a comprehensive and implementable Groundwater Sustainability Plan for two management areas to comply with the State of California SGMA. The project entailed development of a CEP, communications and outreach tools, attendance and facilitation of public meetings, and development of outreach materials such as quarterly newsletters and social media posts.

Deliverables:

- CEP, communication and outreach tools, newsletters, social media posts.

Client: Santa Ynez River Water Conservation District (Subconsultant to Stetson Engineers)
Reference: Bill Buelow, Groundwater Program Manager; 805.620.7985; bbuelow@syrwcd.com
Contract Amount: \$115,220
Period of Performance: 2019–2021 (30 months)

6

Firm's Local Experience

6 Firm's Local Experience

Our team understands the District's needs and local issues, some of which have become more immediate due to the recent wildfire. The 2020 CZU Lightning Complex (CZU Complex) fire caused severe infrastructure damage, water supply and quality issues, and expedited the need for nearby, smaller water systems to consolidate with the District. The devastating results of the CZU Complex fire has increased the District's need of communicating important information to their current 7,9000 customer base and to the new customers absorbed from the two consolidations. The District has recently developed a multi-year capital improvement program in their Water Master Plan to help solve past and more recent issues.

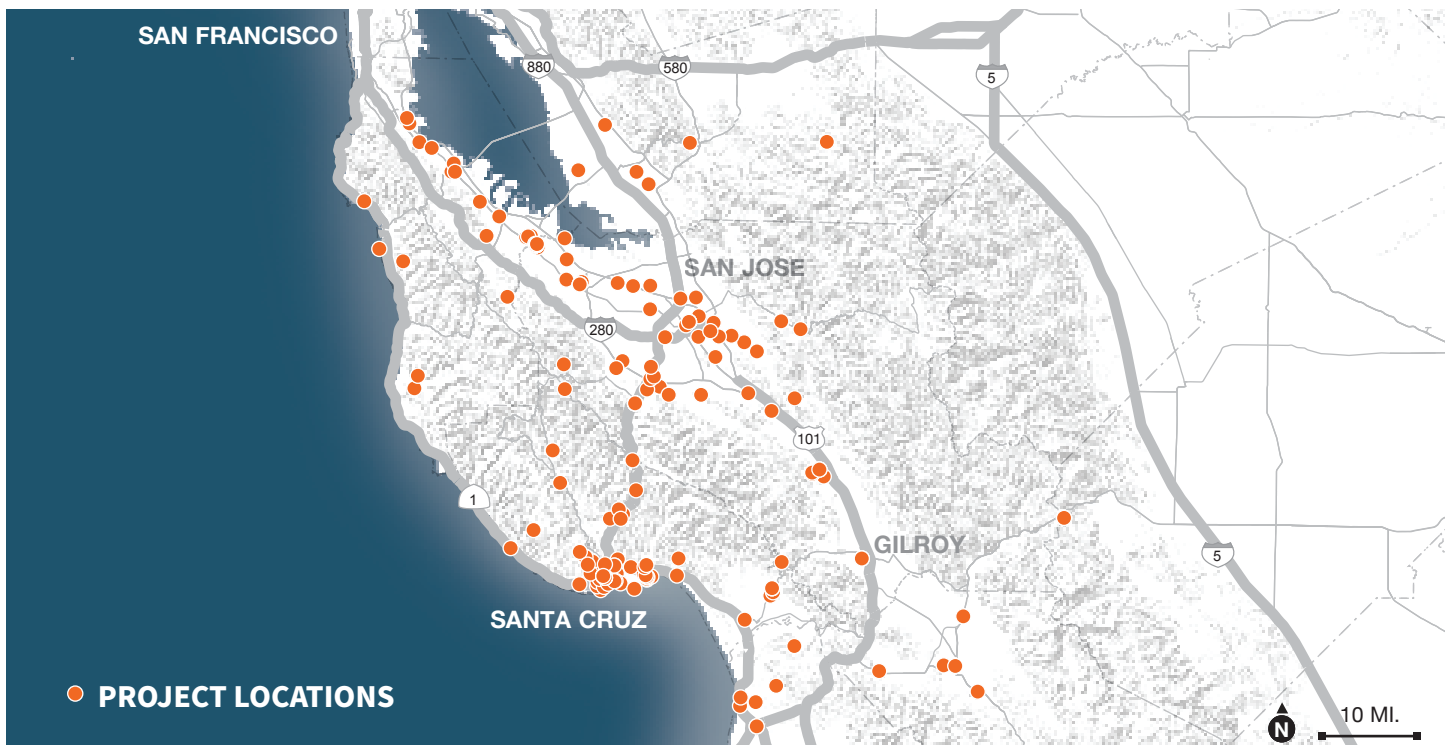
Our team understands that the District operates a complex water distribution system because it supplies water from different water sources to two separate drinking water systems—the San Lorenzo Valley Water District and San Lorenzo Valley Water District–Felton. In addition to supplying water from different water sources, an added complexity is the various land uses of the service area of the two water systems, which include timber production; state and regional parks; residential, commercial, agriculture, and open space; and water supply and watershed protection. This requires a need for the District to clearly communicate different information to each system.

The primary District water source has historically been surface water. However, due to the fire's adverse effect on the surface

water quality, the District now primarily relies on groundwater. The groundwater aquifers are typically used for seasonal and year-to-year storage because of the District's limited storage capacity above ground. The switchover to groundwater has affected the quality of water served to the District's two drinking water systems because of the high dissolved mineral content in the groundwater. High dissolved mineral content can affect water odor, taste, and color, which can cause concerns to customers even if there are no present health risks.

In addition to the CZU Complex fire, the District also faces more challenges from drought. We understand that the District's customers have successfully lowered their water usage due to previous droughts, but state requirements will likely ask to further reduce water usage. This will require further communications with the District's water systems' customers to encourage them to continue to practice water efficient behavior and install water efficient devices.

Our staff is also familiar with the greater region of the District—Santa Cruz County and the Central Coast region as well as the East Bay. We currently have staff present in our Santa Cruz, Santa Barbara, and Oakland offices, and many Dudek employees have worked on several projects in the region, some noted in the "Experience and Past Performance" section and others not listed, such as the Parajo River and Salsipuedes Creek Levee Culvert Replacements projects.



7

Creative Alternatives

7 Creative Alternatives

Dudek understands that public outreach and engagement are foundational to meeting the District’s objectives, and that the District must also have a creative but straightforward approach to communicating goals and outcomes as well as ensuring efficient implementation of policies, programs, and projects. To meet the District’s objectives, our team understands that a creative approach must be utilized.

OUTREACH EVENTS

With virtual meeting platforms, outreach events have become more feasible to attend. The District can hold brown bag lunch meetings to educate stakeholders on current projects and different topics, such as the District’s water portfolio. Brown bag lunch meetings allow the public to easily attend a meeting without leaving the office during their lunch time or while simultaneously completing a light work task. For virtual events or workshops that require more engagement, the District can utilize other virtual meeting platforms, such as Remo, which allows a user to create a custom floor to recreate any real-world environment to make them feel like they are at an in-person event. Other virtual meeting platforms, such as Mural, can be used in collaboration with Zoom or Microsoft Teams to elevate collaboration using a digital whiteboard by offering various add-on features. However, when safe, having face-to-face interactions with the public is also important. In-person workshops or community events can be up-scaled by creating more engaging environments, such as utilizing interactive poster boards with sticker voting, hosting design charettes, or building models.

VISUAL TECHNICAL STORYTELLING

In an age where everyone is inundated with information, it is essential that the District’s technical information be molded into a well-defined message. Our visual storytellers will work in concert with our technical subject matter experts to shape complex water management processes into visual stories tailored to the public or other specific audiences that are effective for use in all media. Our creative services team goes beyond the typical visuals used to convey complex processes, such as graphs and maps, and uses 3D renderings to simplify complexity. Our team can take lengthy or complex descriptions of water resources processes, project progress, or workflow that may be hard for readers to visualize, and create engaging, easy-to-understand graphics that do the explaining for the District.

Other examples of visual technical storytelling techniques are virtual tours. The District can provide tours of their treatment facilities or projects by offering a self-guided tour online. This allows the user to get a better understanding of how a water treatment process works and the infrastructure used or really immerse themselves in a project.

DOCUMENT ACCESSIBILITY

Document accessibility is not always at the forefront of being seen as a creative solution, but creating outreach material that is engaging and inclusive is a solution to meet the District’s objectives. Our in-house team is well-equipped and can continue to help the District meet the accessibility requirements of Section 508 of the federal Rehabilitation Act of 1973, as amended (29 U.S.C. Sec. 794d), and regulations implementing that act as set forth in Part 1194 of Title 36 of the Federal Code of Regulations, and the Web Content Accessibility Guidelines (WCAG) 2.1, Level AA. Dudek is prepared to ensure that the District’s public-review documents are 508- and WCAG-compliant and visually appealing. Our team utilizes specialized software (CommonLook PDF and Office) to facilitate a higher degree of compliance in a comprehensive and cost-effective manner.

Water activities

Here is an example of recreational and ceremonial activities people do to interact with water:



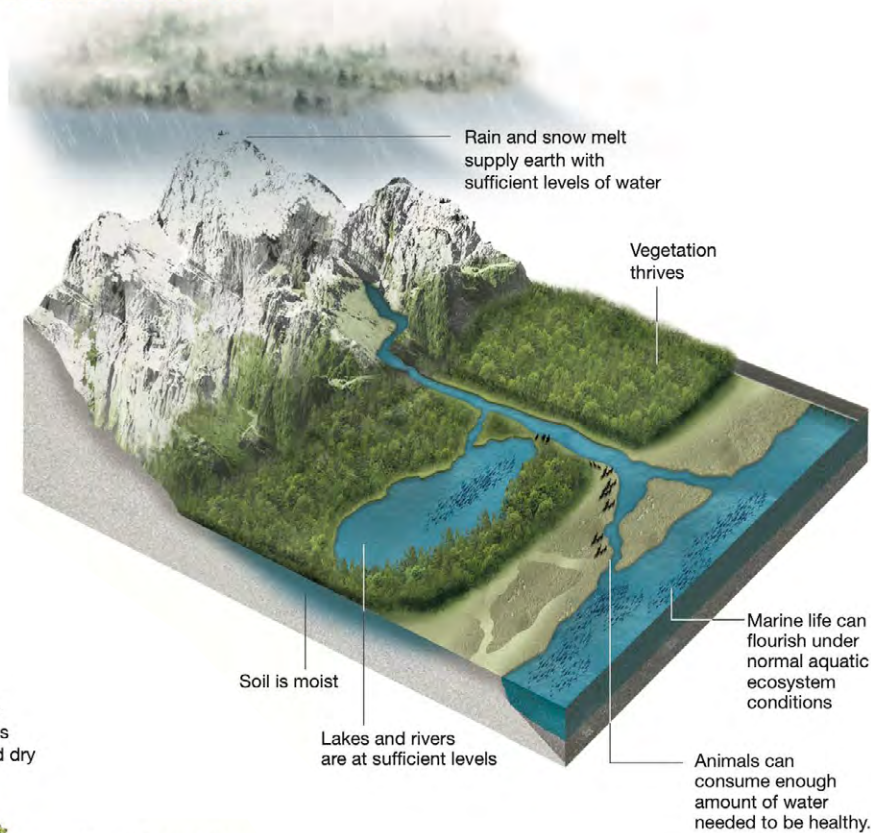
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Examples of Work Product

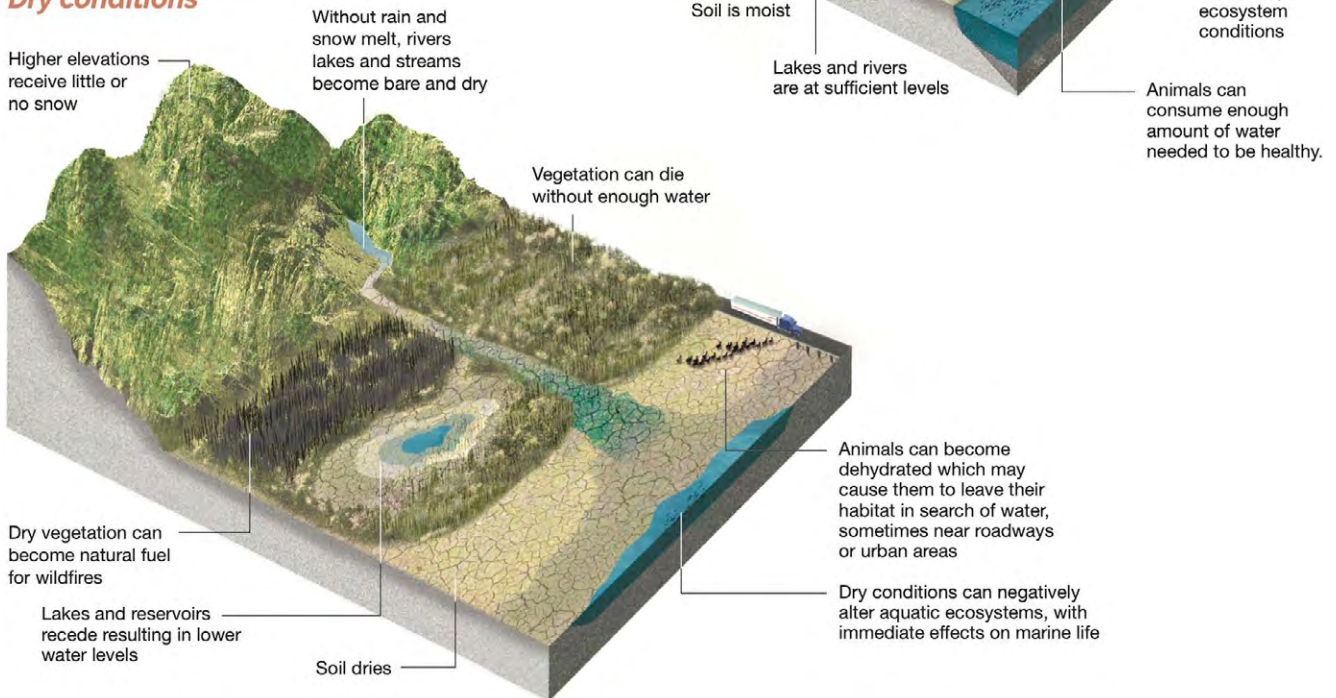
Comparing normal to dry conditions

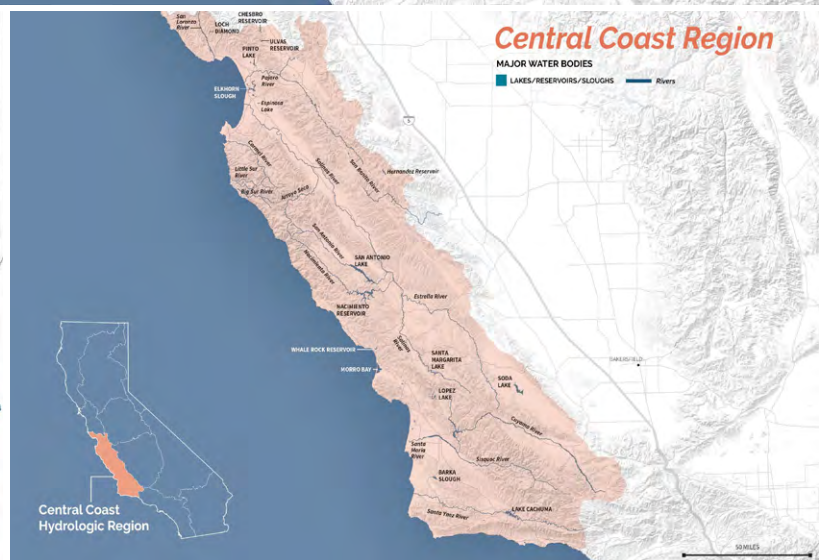
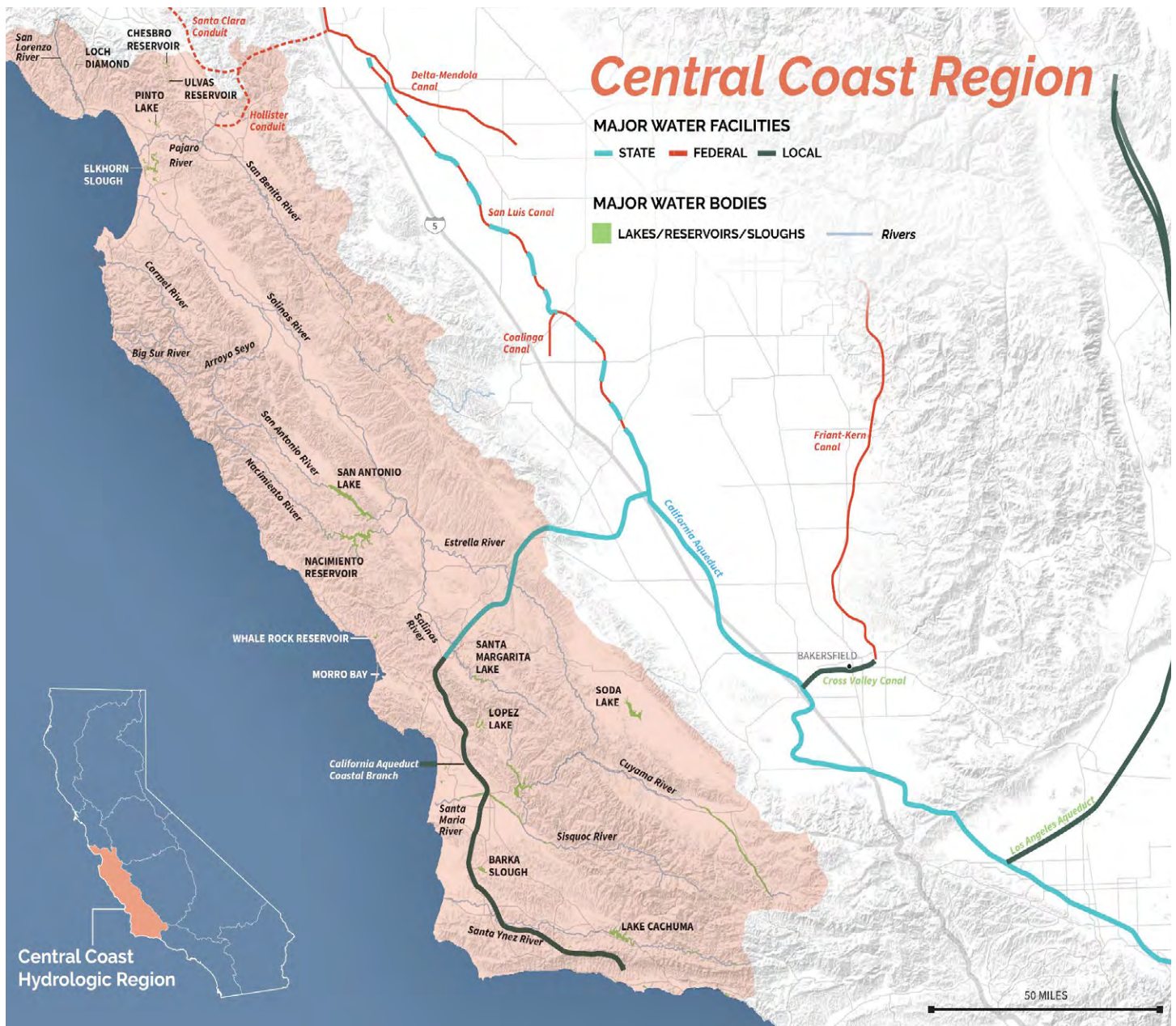
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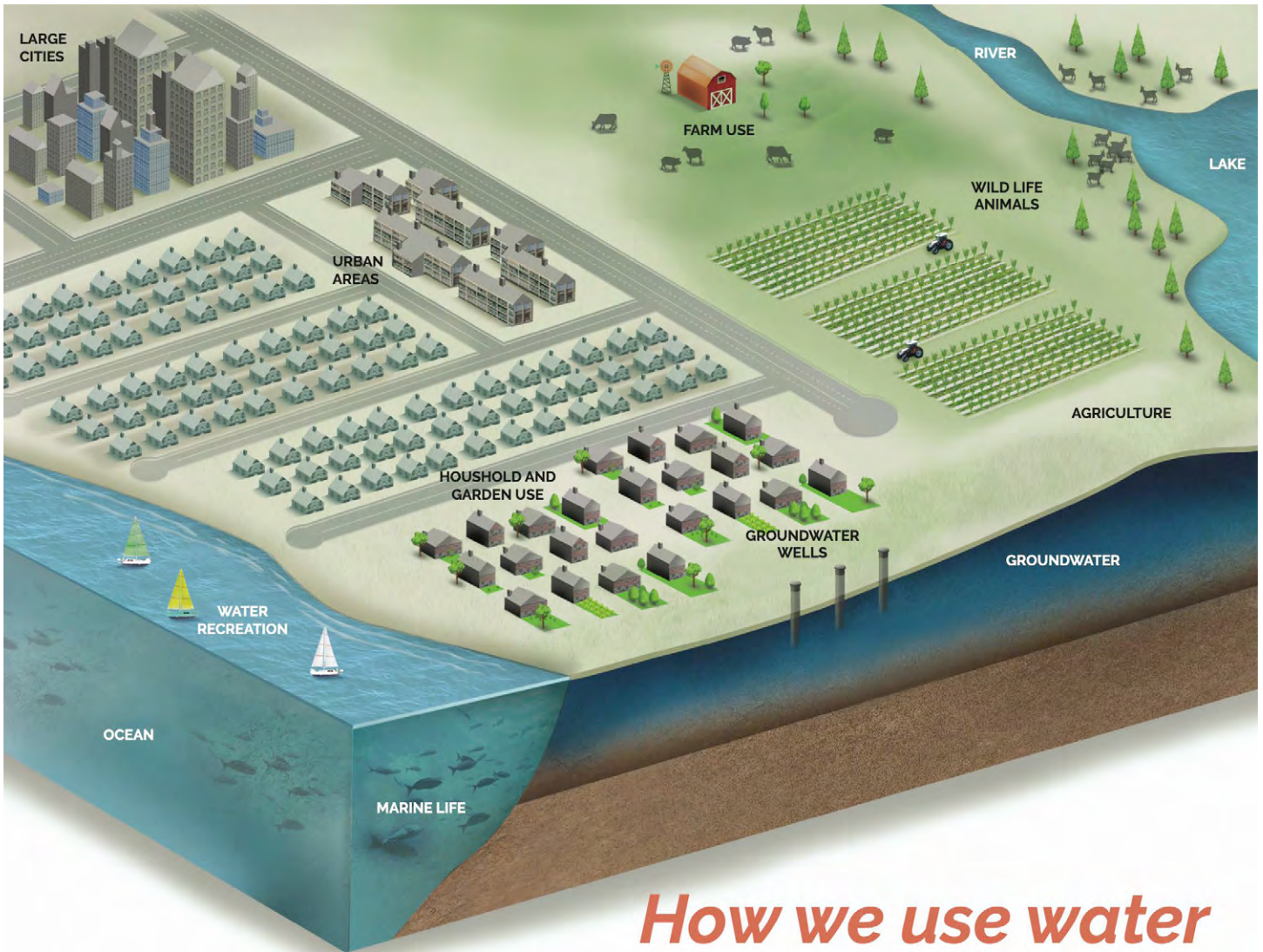
Normal conditions

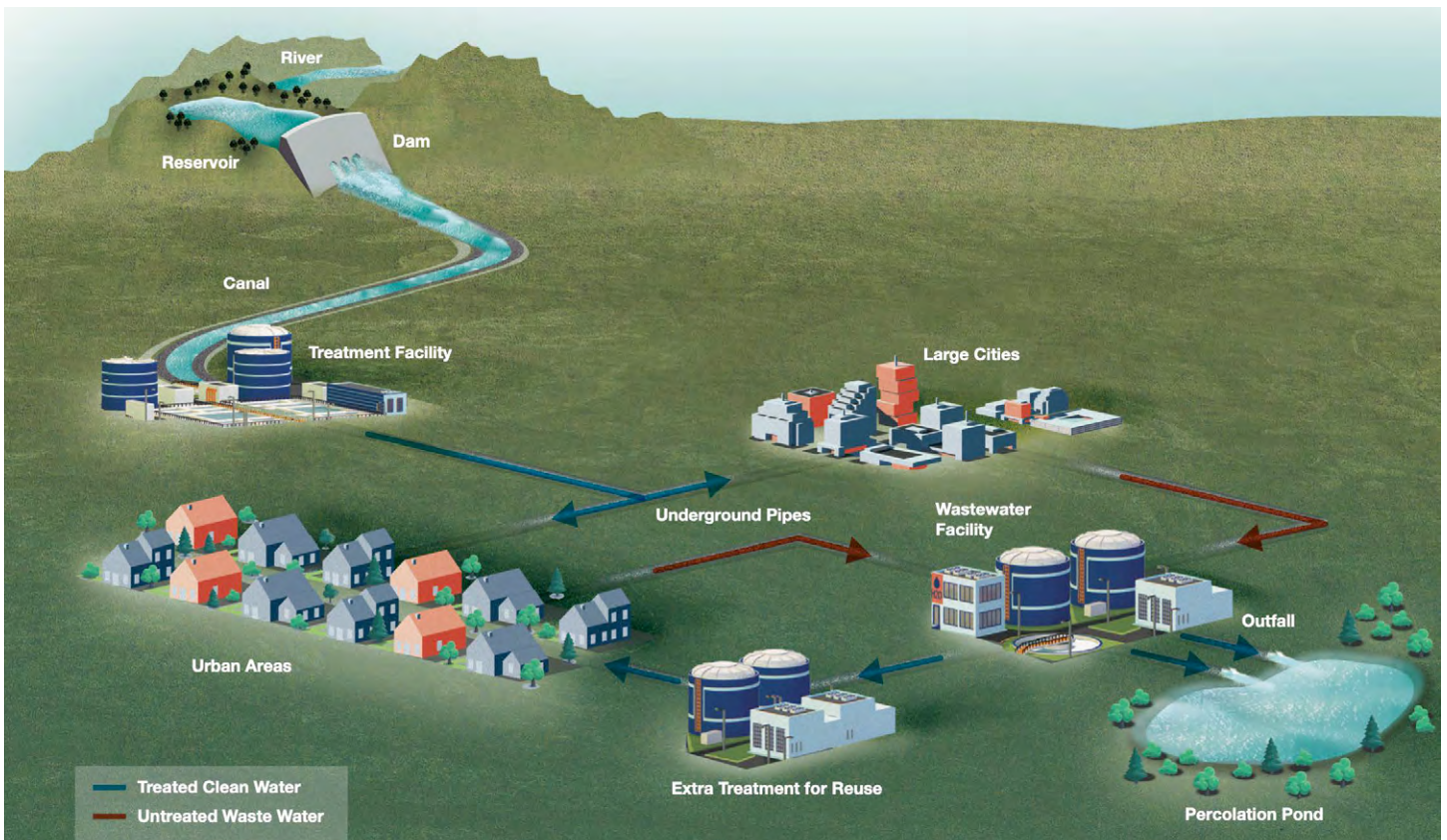
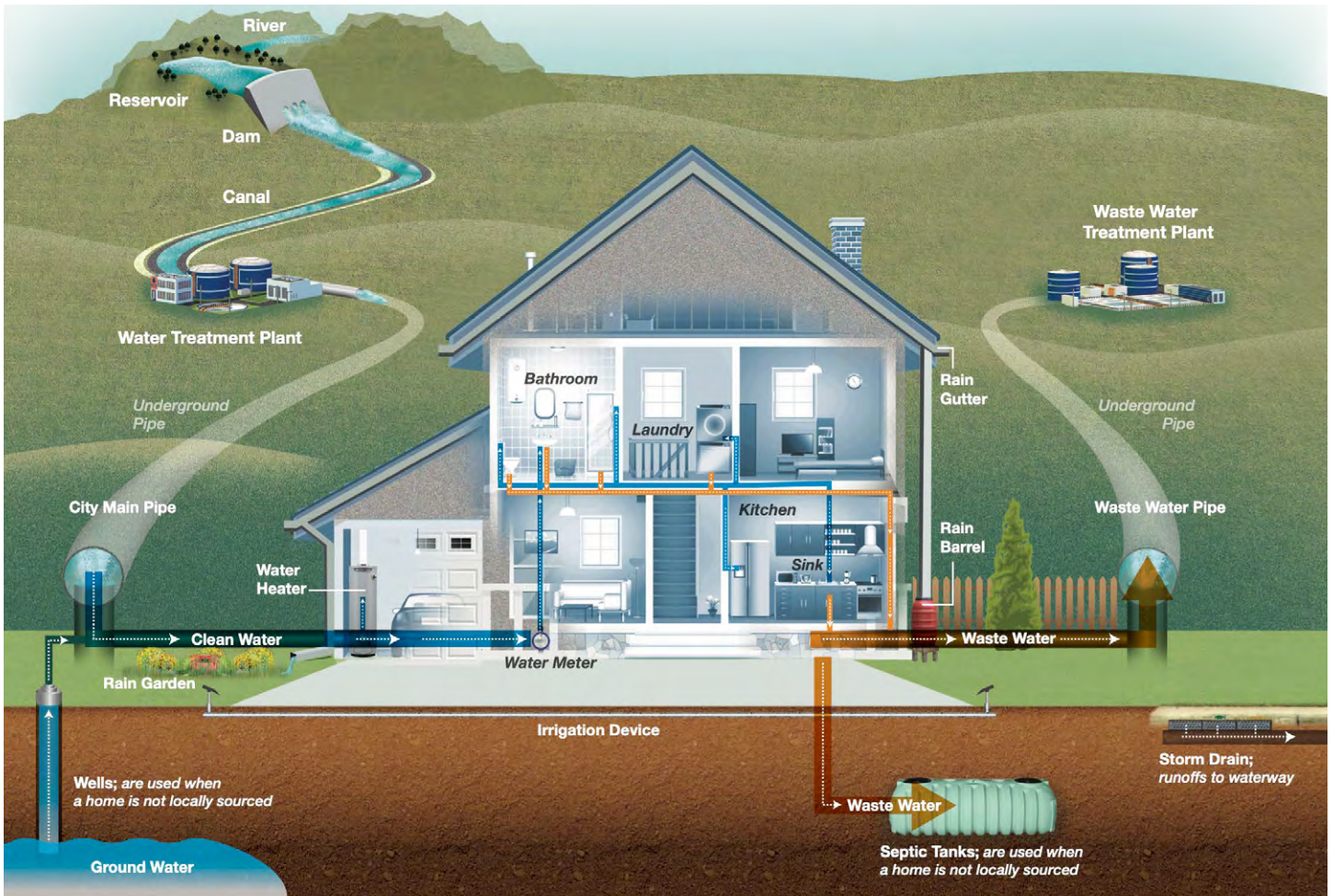


Dry conditions





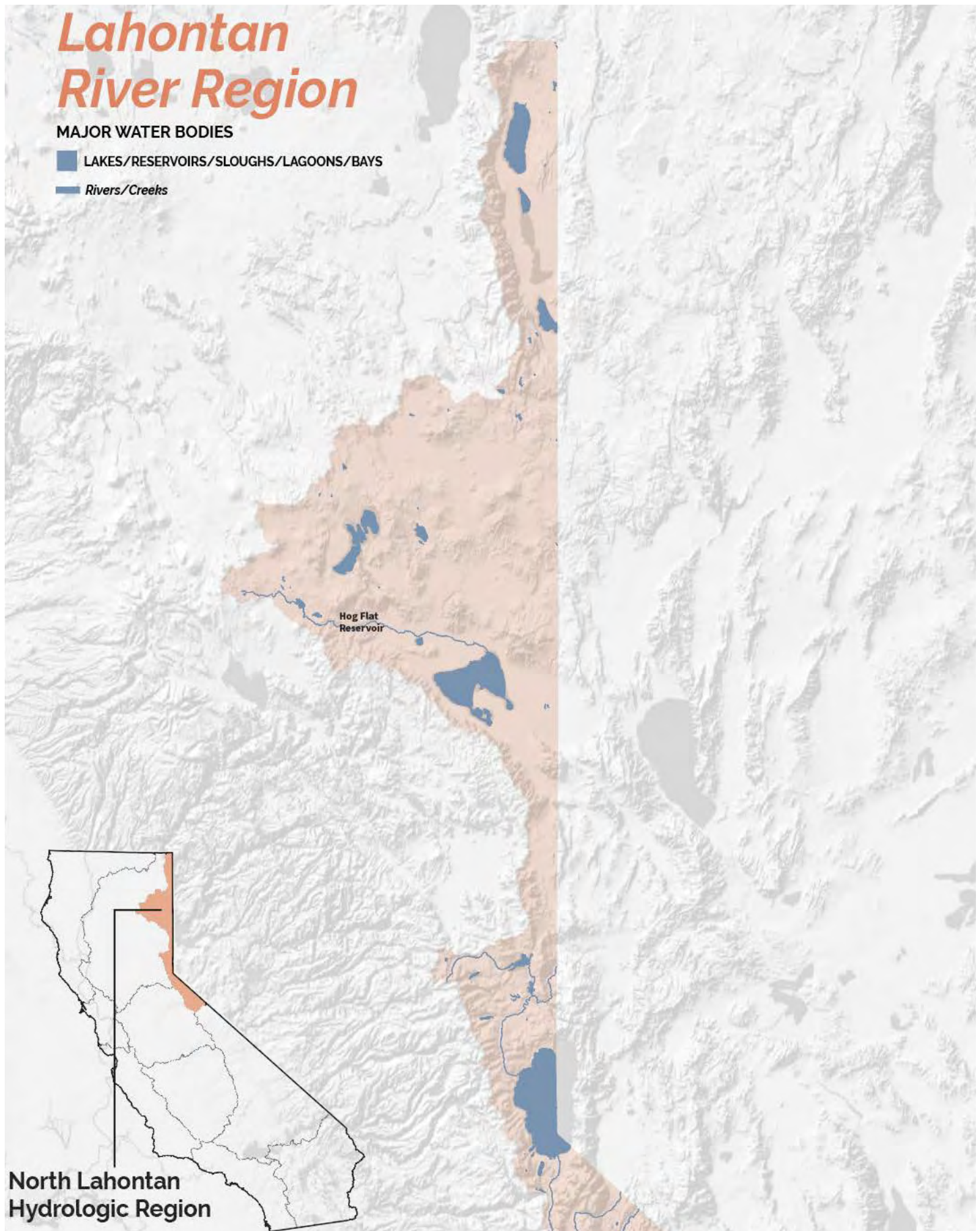






Major California Water Facilities





Resumes



JANE GRAY

Senior Regional Planner

Education

Universität Dortmund, Germany
MS, Regional Planning and Management

State University of New York, Buffalo
BS, Social Work

Professional Affiliations

Second District Appointee to the County Agricultural Advisory Committee

Vice Chair, Central Coast Regional Water Quality Control Board

Jane Gray is a regional planner, environmental specialist, and project manager with 26 years' project management and environmental planning experience, specializing in water/wastewater planning and permitting, agricultural resource and policy planning, policy analysis, land use planning, project development and entitlement services, and grant writing and management. Ms. Gray has a diverse and nuanced planning background, having worked as a project manager, analyst, and environmental planner for non-governmental entities, public agencies, and private firms and corporations. She has been responsible for projects varying from small-scale development and infrastructure planning in developing economies to private residential and commercial developments throughout California.

RELEVANT PROJECT EXPERIENCE

COMMUNICATION AND ENGAGEMENT, PROJECT MANAGEMENT, TECHNICAL NEEDS ASSESSMENT TECHNICAL ASSISTANCE

Providing program management and leading the development and implementation of the Prop 68 Technical Assistance with the California Department of Water Resources (DWR) for Tribal Governments, Tribal Communities and Underrepresented Communities. Ms. Gray is the Project Director leading and managing all components of the contract. She is spearheading Communication and Engagement, Workshop coordination and facilitation, stakeholder engagement and community dialogue, needs, risks and vulnerabilities assessments, surveys heat mapping and community prioritization and evaluation. The project entails extensive data collection, management and curation, extensive community surveying, and provision of technical assistance, report writing and outcome analysis.

PUBLIC AND STAKEHOLDER ENGAGEMENT AND FACILITATION FOR THE FORMATION OF A GROUNDWATER SUSTAINABILITY AGENCY IN THE CUYAMA VALLEY, SANTA BARBARA COUNTY WATER AGENCY, SANTA BARBARA COUNTY, CALIFORNIA

Wrote a successfully awarded grant for formation of a Groundwater Sustainability Agency (GSA) in the Cuyama Groundwater Basin. Prepared a Communication and Engagement Plan, conducted extensive bilingual public and stakeholder outreach and community engagement, coordinated bilingual materials and workshops, and coordinated monthly, year-long negotiations and meetings with four counties that overlie the Cuyama Valley Basin as well as the Cuyama Community Services District, Cuyama Basin Water District to develop a voting structure, formation documents, and establish a GSA for the Cuyama Valley Groundwater Basin.

MANAGEMENT, FACILITATION, OUTREACH AND ENGAGEMENT FOR THE SANTA BARBARA COUNTY INTEGRATED REGIONAL WATER MANAGEMENT PROGRAM

Providing overall project management, coordination consultants, internal staff, project proponents, and communities for the Needs Assessment for the (DACI) grant. Coordinating with all agencies' staff and communication with NGOs and CBOs to conduct detailed ethnographic surveys and gather and characterize water, wastewater, climate, and other, needs, opportunities, strengths, threats, risks, and vulnerabilities for the development of solutions that are either project-based, instructional-capacity-based, or require other solutions. Working with the communities to scope and determine solutions, production of outreach, educational engagement materials, presentations, and dialogues with the communities, agencies, NGOs, and CBOs. Preparation of a summarized and detailed ethnographic study of the various communities in the region and comprehensive inventory of needs, opportunities, strengths, threats, risks, and vulnerabilities, as well as proposed solutions and associated time horizons.



CLAUDIA FLORES

Communications and Engagement Specialist

Education

Bren School of Environmental Science & Management – University of California, Santa Barbara (UCSB)

Master of Environmental Science and Management, 2021

University of California, Los Angeles (UCLA)

BS, Environmental Science, 2017

Professional Affiliations

Association of Women in Water, Energy, and Environment, Association of Environmental Professionals

Claudia Flores is communications and engagement specialist, specializing in water resources management. Her 4 years' experience in academia allowed her to work with public agencies in California and the southeast and understand water system governance and policy implications. In addition to her policy work, Ms. Flores' interdisciplinary background includes working with public agencies on water resources planning projects that involve engaging and communicating with the public on water resources management topics, such as groundwater and stormwater.

PROJECT EXPERIENCE

COMMUNITY ENGAGEMENT PLANS

Community Engagement Plan- Community Wildfire Protection Plan, Los Angeles County Department of Regional Planning, Los Angeles, California. Assisted in developing a community engagement plan for the County Community Wildfire Protection Plan that will provide resources to enhance wildfire mitigation and preparedness. (2022).

Community Engagement Plan- Transformative Climate Communities Implementation Grant, City of Indio, Indio, California. Assisted in developing a community engagement plan for the City of Indio Transformative Climate Communities Implementation Grant that will fund \$35 million worth of community-led projects that reduce local air quality in disadvantaged communities. (2022).

WATER RESOURCES PLANNING

Municipal Separate Storm Sewer System (MS4) On-Call Services, City of Goleta, Goleta, California. Updated repository of 40 mobile washers that serve the City of Goleta to conduct outreach about stormwater compliance. Assisted in annual infiltration rate testing for 2 city-owned Best Management Practices. Authored blog posts to inform the public about less toxic pest control methods to reduce pesticides from entering local waterways through stormwater runoff for the City's monthly newsletter. Assisted in the Illicit Discharge Detection and Elimination Monitoring Program and completed site visits and sent written correspondence to property owners. (2022).

Proposition 68 – Technical Assistance, California Department of Water Resources, Sacramento, California. Contacted 210 tribal members via e-mail, postal mail, fax, and phone to complete a survey to receive technical assistance for groundwater management. Developed educational materials for K-12 students statewide on water resources topics tailored to California's 10 hydrologic regions. Assisted in identify water systems in need of technical assistance. (2022).

GRANT WRITING

Integrated Regional Water Management Grant Program – Round 2, Central Coast Region, California. Assisted in compiling and distributing resources for funding opportunities and grant application material for the Integrated Regional Water Management Grant Program for potential collaborations between a pool of 50+ agencies to implement multi-benefit water management projects in the Central Coast region. (2022).

Sustainable Groundwater Management Grant Program, Borrego Springs Water District, Borrego Springs, California. Assisted in developing competitive project ideas for 6 applicants and compiling material for a \$7.6 million grant application to fund groundwater management projects in Borrego Springs Subbasin, a Department of Water Resources designated critically over drafted basin. (2022).



MADELYN MURRAY

Environmental Planner

Education

University of California, Santa Barbara

BA, Environmental Studies
(Ecology emphasis)

Madelyn Murray (MAD-uh-lin MUR-ee; she/her) is an environmental planner with 3 years' experience in environmental research, grant writing, and regional planning support. Ms. Murray specializes in supporting underserved communities, outreach and engagement, and climate resiliency. As demonstrated in her work, Ms. Murray understands the nuances of connecting with and gathering feedback from diverse populations, whose needs often vary. Ms. Murray provides her expertise and diligent support on numerous grant applications and plan updates. She has also assisted on a wide variety of community outreach and engagement efforts. Her multi-disciplinary background in ecology, sustainability, and outreach coupled with her passion for environmental justice allow her to make critical decisions on each project's impact to the community and environment.

PROJECT EXPERIENCE

COMMUNICATION AND ENGAGEMENT FOR INTEGRATED WILDFIRE SAFETY PROGRAM, COUNTY OF LOS ANGELES, CALIFORNIA

Developed a tailored Communication and Engagement Plan to guide the County of Los Angeles in outreach efforts. Additional support included creating informational surveys, outlining schedules and agendas, and providing guidance on workshops.

TRANSFORMATIVE CLIMATE COMMUNITIES IMPLEMENTATION GRANT SUPPORT AND COMMUNITY ENGAGEMENT, CITY OF INDIO, CALIFORNIA

Supported the City of Indio as an extension of staff for the preparation of the Sustainable Growth Council's Transformative Climate Communities (TCC) Implementation Grant. Managed and executed ongoing outreach and community engagement, a significant component of the TCC Implementation process. Additional support included preparing grant materials, project scoping, decision making guidance, and various communication efforts.

PUBLIC AND STAKEHOLDER ENGAGEMENT FOR MASTER PLAN DEVELOPMENT, SAN MATEO COUNTY HARBOR DISTRICT, CALIFORNIA

Assisted in outreach and engagement tasks for Master Plan development, including the creation of social media posts, surveys, and handouts. Additional efforts included hosting in-person pop-up events and facilitating online workshops.

TECHNICAL ASSISTANCE, COMMUNICATION AND ENGAGEMENT, DEPARTMENT OF WATER RESOURCES, CALIFORNIA

Providing support with development and implementation of Proposition 68 Technical Assistance for the California Department of Water Resources (DWR) for Tribal Governments, Tribal Communities, and Underrepresented Communities. Specifically provided support on curating water surveys, composing educational materials, and various research tasks. The project entails extensive data collection, management and curation, extensive community surveying, and provision of technical assistance, report writing, and outcome analysis.

SUSTAINABLE GROUNDWATER MANAGEMENT ACT STAKEHOLDER COMMUNICATION AND ENGAGEMENT, SANTA YNEZ RIVER WATER CONSERVATION DISTRICT, SANTA YNEZ RIVER VALLEY GROUNDWATER BASIN, CALIFORNIA

Facilitated communication and engagement with stakeholders and members of the public for the Western Management Area and Central Management Area of the Santa Ynez River Valley Groundwater Basin. Support included preparing and facilitating consultant presentations to discuss Sustainable Groundwater Management Act processes and creation of newsletters for distribution to the public.



JUSTIN NAKHONTHAP

Planner

Education

California Polytechnic State University, Pomona

BS, Urban and Regional Planning, 2020

Palomar College

AS, Geographic Information Systems, 2021

Professional Affiliations

American Planning Association

Justin Nakhonthap (JUH-sten nah-KAWN-tuhp; he/him) is a planner with professional experience in housing policy development and geographic information system (GIS). Mr. Nakhonthap has experience in housing element updates, land use policy, mixed-use and transit-oriented planning, and communications and engagement strategies. With knowledge of urban design philosophy, technical skills, visual design creativity, dedication to the community, and collaboration with city planners and community stakeholders, he ensures that each project exceeds the needs and expectations of and clients and colleagues.

PROJECT EXPERIENCE

LOS ANGELES METRO AREA PLAN, LOS ANGELES COUNTY, CALIFORNIA

Assisted in the outreach component of the Los Angeles Metro Area Plan by organizing and attending community events as part of a series of workshops. Tasks include distributing brochures, flyers, and branded items; directing residents to appropriate resources; obtaining feedback on community needs and priorities to inform the draft plan; and photo documentation

INTEGRATED WILDFIRE SAFETY PLAN, LOS ANGELES COUNTY, CALIFORNIA

Served as a planner for the creation of the outreach and engagement materials for the Countywide Community Wildfire Protection Plan of the Integrated Wildfire Safety Plan for Los Angeles County. Assisted by drafting agendas for community events, creating surveys and polls, participating in online workshops and informational meetings, coordinating with graphics and translation services, and providing outreach materials such as brochures and social media content.

OTHER-TO-RESIDENTIAL TOOLKIT, SOUTHERN CALIFORNIA ASSOCIATION OF GOVERNMENTS, CALIFORNIA

Served as a supporting member for the Other-To-Residential Toolkit. Developed a visually engaging and interactive web application using the ArcGIS Story Map platform to convey key components and typologies of the toolkit for homeowners, business owners, and developers.

HOUSING ELEMENT UPDATE, CITY OF CONCORD, CALIFORNIA

Served as the Housing Element planner for the comprehensive update to the City of Concord's Housing Element. Tasks included completing a comprehensive sites inventory and analysis for the 6th Cycle Regional Housing Needs Assessment by income level, creating detailed maps of identified sites for the 6th Cycle through GIS, identifying local housing needs and constraints to assist with maintaining and creating housing at all income levels, identifying and applying programs relevant to the Housing Element, ensuring goals and policies are consistent with the General Plan, and providing key data and findings for the analysis of adequate sites.

EAST SAN GABRIEL VALLEY Y-PLAN, ROWLAND HEIGHTS, CALIFORNIA

The Community Planning Studio at California Polytechnic State University, Pomona, collaborated with the East San Gabriel Valley Y-PLAN and Rowland Heights High School. Tasks included the creating various materials for community outreach and youth engagement in planning through blogs, brochures, and creative media/games; planning field trips and programs related to Safe Routes to School; and assisting with planning workshops.

DUDEK

800.450.1818 | HELLO@DUDEK.COM
DUDEK.COM



Proposed Total Professional Fee and Fee Schedules

Dudek Labor Hours and Rates								TOTAL DUDEK HOURS	DUDEK LABOR COSTS	TOTAL FEE
Project Team Role:		Senior Specialist IV	Specialist II	Analyst V	Analyst III	Publications Specialist IV	Creative Services III			
Team Member:		Jane Gray	Claudia Flores	Madelyn Murray	Justin Nakhonthap	Publications Specialist IV	Creative Services III			
Billable Rate:		\$235.00	\$150.00	\$130.00	\$105.00	\$120.00	\$150.00			
Task 1	Administration (Months 1-12)	16	-	-	-	-	-	16	\$3,760.00	\$3,760.00
Task 2 Communication and Engagement Plan (Months 1-4)										
2.1	Audit Existing Outreach Plan (Month 1)	2	20	10	20	-	-	52	\$6,870.00	\$6,870.00
2.2	Create New CEP and Execute (Months 2-4)	4	6	10	20	6	-	46	\$5,960.00	\$5,960.00
	<i>Subtotal Task 2</i>	6	26	20	40	6	-	98	\$12,830.00	\$12,830.00
Task 3 Conduct Outreach (Months 4-12)										
3.1	Develop Outreach Style Templates (Months 4-5)	2	6	6	8	-	8	30	\$4,190.00	\$4,190.00
3.2	Media Coordination (Months 4-12)	2	4	6	8	-	-	20	\$2,690.00	\$2,690.00
3.3	Produce Regular Outreach Materials (Months 5-12)	6	14	14	30	8	12	84	\$11,240.00	\$11,240.00
	<i>Subtotal Task 3</i>	10	24	26	46	8	20	134	\$18,120.00	\$18,120.00
Task 4	Memos and Meetings	8	28	10	28	-	-	74	\$10,320.00	\$10,320.00
	Total Hours	40	78	56	114	14	20	322		
	Total	\$9,400.00	\$11,700.00	\$7,280.00	\$11,970.00	\$1,680.00	\$3,000.00		\$45,030.00	\$45,030.00

DUDEK 2022 Standard Schedule of Charges

Engineering Services

Project Director	\$310.00/hr
Principal Engineer III	\$285.00/hr
Principal Engineer II	\$275.00/hr
Principal Engineer I	\$265.00/hr
Program Manager	\$255.00/hr
Senior Project Manager	\$255.00/hr
Project Manager	\$245.00/hr
Senior Engineer III	\$240.00/hr
Senior Engineer II	\$230.00/hr
Senior Engineer I	\$220.00/hr
Project Engineer IV/Technician IV	\$210.00/hr
Project Engineer III/Technician III	\$200.00/hr
Project Engineer II/Technician II	\$185.00/hr
Project Engineer I/Technician I	\$165.00/hr
Senior Designer II	\$190.00/hr
Senior Designer I	\$185.00/hr
Designer	\$175.00/hr
Assistant Designer	\$170.00/hr
CADD Operator III	\$165.00/hr
CADD Operator II	\$155.00/hr
CADD Operator I	\$140.00/hr
CADD Drafter	\$125.00/hr
CADD Technician	\$115.00/hr
Project Coordinator	\$145.00/hr
Engineering Assistant	\$120.00/hr

Environmental Services

Project Director	\$255.00/hr
Senior Specialist IV	\$235.00/hr
Senior Specialist III	\$225.00/hr
Senior Specialist II	\$210.00/hr
Senior Specialist I	\$195.00/hr
Specialist V	\$185.00/hr
Specialist IV	\$175.00/hr
Specialist III	\$165.00/hr
Specialist II	\$150.00/hr
Specialist I	\$140.00/hr
Analyst V	\$130.00/hr
Analyst IV	\$115.00/hr
Analyst III	\$105.00/hr
Analyst II	\$95.00/hr
Analyst I	\$85.00/hr
Technician III	\$75.00/hr
Technician II	\$65.00/hr
Technician I	\$55.00/hr

Mapping and Surveying Services

Application Developer II	\$195.00/hr
Application Developer I	\$155.00/hr
GIS Analyst V	\$205.00/hr
GIS Analyst IV	\$165.00/hr
GIS Analyst III	\$145.00/hr
GIS Analyst II	\$130.00/hr
GIS Analyst I	\$115.00/hr
UAS Pilot	\$115.00/hr
Survey Lead	\$185.00/hr
Survey Manager	\$135.00/hr
Survey Crew Chief	\$115.00/hr
Survey Rod Person	\$95.00/hr
Survey Mapping Technician	\$95.00/hr

Construction Management Services

Principal/Manager	\$195.00/hr
Senior Construction Manager	\$185.00/hr
Senior Project Manager	\$175.00/hr
Construction Manager	\$160.00/hr
Project Manager	\$150.00/hr
Resident Engineer	\$150.00/hr
Construction Engineer	\$150.00/hr
On-site Owner's Representative	\$140.00/hr
Prevailing Wage Inspector	\$139.00/hr
Construction Inspector	\$135.00/hr
Administrator/Labor Compliance	\$100.00/hr

Hydrogeology/HazWaste Services

Project Director	\$305.00/hr
Principal Hydrogeologist/Engineer II	\$280.00/hr
Principal Hydrogeologist/Engineer I	\$260.00/hr
Senior Hydrogeologist V/Engineer V	\$240.00/hr
Senior Hydrogeologist IV/Engineer IV	\$230.00/hr
Senior Hydrogeologist III/Engineer III	\$220.00/hr
Senior Hydrogeologist II/Engineer II	\$210.00/hr
Senior Hydrogeologist I/Engineer I	\$200.00/hr
Project Hydrogeologist V/Engineer V	\$185.00/hr
Project Hydrogeologist IV/Engineer IV	\$175.00/hr
Project Hydrogeologist III/Engineer III	\$165.00/hr
Project Hydrogeologist II/Engineer II	\$155.00/hr
Project Hydrogeologist I/Engineer I	\$145.00/hr
Hydrogeologist/Engineering Assistant	\$120.00/hr

District Management & Operations

District General Manager	\$210.00/hr
District Engineer	\$205.00/hr
Operations Manager	\$160.00/hr
District Secretary/Accountant	\$135.00/hr
Collections System Manager	\$135.00/hr
Grade V Operator	\$125.00/hr
Grade IV Operator	\$110.00/hr
Grade III Operator	\$100.00/hr
Grade II Operator	\$80.00/hr
Grade I Operator	\$75.00/hr
Operator in Training	\$75.00/hr
Collection Maintenance Worker	\$75.00/hr

Creative Services

Creative Services IV	\$165.00/hr
Creative Services III	\$150.00/hr
Creative Services II	\$135.00/hr
Creative Services I	\$120.00/hr

Publications Services

Technical Editor IV	\$165.00/hr
Technical Editor III	\$150.00/hr
Technical Editor II	\$135.00/hr
Technical Editor I	\$120.00/hr
Publications Specialist IV	\$120.00/hr
Publications Specialist III	\$110.00/hr
Publications Specialist II	\$100.00/hr
Publications Specialist I	\$90.00/hr
Clerical Administration	\$90.00/hr

Forensic Engineering – Court appearances, depositions, and interrogatories as expert witness will be billed at 2.00 times normal rates.

Emergency and Holidays – Minimum charge of two hours will be billed at 1.75 times the normal rate.

Material and Outside Services – Subcontractors, rental of special equipment, special reproductions and blueprinting, outside data processing and computer services, etc., are charged at 1.15 times the direct cost.

Travel Expenses – Mileage at current IRS allowable rates. Per diem where overnight stay is involved is charged at cost.

Invoices, Late Charges – All fees will be billed to Client monthly and shall be due and payable upon receipt. Invoices are delinquent if not paid within 30 days from the date of the invoice. Client agrees to pay a monthly late charge equal to 1% per month of the outstanding balance until paid in full.

Annual Increases – Unless identified otherwise, these standard rates will increase 3% annually.

The rates listed above assume prevailing wage rates does not apply. If this assumption is incorrect Dudek reserves the right to adjust its rates accordingly.



RFP for

Communications & Outreach Services

Prepared by Miller Maxfield, Inc.
Strategic Communications & Public Affairs
133 Mission Street, Suite 101
Santa Cruz, CA 95060
(831) 227-6469



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Executive Summary

Miller Maxfield, Inc. is a locally owned, award-winning strategic communications and public affairs firm that was established in 2002. Delivering a full array of services, we help our public sector, nonprofit and small business clients develop and execute dynamic, engaging communications strategies that have measurable impacts.

Our work is defined by our ability to effectively tell our clients' stories, utilizing skills and strategies that are tailored to each client and project. Miller Maxfield's services include strategic analysis, messaging, stakeholder and community engagement, branding and graphic design, social media strategy, digital marketing, media relations, event production and promotion, website development and maintenance, video production and crisis communications.

For our clients, we provide essential understanding and insights into the most effective strategies and tactics required to educate target audiences, earn support, and prevent and/or solve misunderstandings related to important public sector projects.

Miller Maxfield has extensive knowledge of Santa Cruz County's diverse communities, and their hyper-local characteristics and unique cultures. Our experienced and determined team combines that knowledge with professional execution of proven, creative strategies that help build public trust and lead to successful outcomes.

Miller Maxfield's Unique Qualifications to Represent SLVWD

As the communications firm of record for the San Lorenzo Valley Water District (SLVWD) from 2013-2018, as well as Santa Margarita Groundwater Agency (SMGWA) from 2018-2022, Miller Maxfield is well positioned to once again serve SLVWD to meet its communications needs and goals.

Miller Maxfield's experience with SLVWD and SMGWA is substantially augmented by our current and past work with a wide variety of organizations that serve the San Lorenzo Valley and the broader region. Covering a wide range of sectors and interests, such as parks, transportation, human services and business/economy, a few of those organizations include Santa Cruz Community Health (which recently opened its new clinic in Ben Lomond), Roaring Camp Railroads, METRO, Friends of Santa Cruz State Parks (which is partnering with State Parks to reopen and rebuild Big Basin), Central Coast Community Energy, and Housing for Health (the County department dedicated to addressing homelessness via programs such as Project Homekey, which recently provided funds for the Veterans Village project).

Miller Maxfield understands water agencies. In addition to our experience with SLVWD and SMGWA, our depth of experience includes service for Pajaro Valley Water Management Agency, Santa Cruz Water Department, Scotts Valley Water District, Mid-County Groundwater Agency, Marina Coast Water District and Salinas Valley Basin Groundwater Sustainability Agency.

Our specific experience with water agencies includes knowledge of water supply systems, capital improvement projects, the Proposition 218 process, community engagement and events, drought and climate change response campaigns, customer service programs, employee recruiting and crisis communications, as well as routine communications support, such as social media strategy and content, website maintenance, email newsletters, direct mail, bill inserts, advertising, signage and more.

Executive Summary

With respect to SLVWD, Miller Maxfield understands the important and unique balancing act continuously faced by the District, some examples of which include:

- Recovery from the CZU Fire - resilience, sustainability and available funding.
- Sources of water – streams and wells, influenced by annual rainfall patterns and sustainability goals.
- Conveyance – investment in pipes, pumps, tanks and inerties.
- Rates – the need to show deep respect for the high cost of living in our area that heavily impacts ratepayers and also the high cost of maintaining a reliable and resilient water system.
- The culture and politics that make SLV a special place.

The San Lorenzo Valley, taken as a whole, is a community that holds fierce pride in the need to protect the beauty and culture of living in the Santa Cruz Mountains. Living in the Valley also means being prepared for anything, especially natural disasters. The people of SLV have a long-standing and widely known reputation for taking care of each other – in both the simplest and most heroic ways, no matter what.

But understanding life in the Valley also means understanding the individual communities that comprise SLV. There are situations when the needs of Felton or Ben Lomond may not be the same as Brookdale or Boulder Creek, which are different still from Lompico or Zayante. In addition, SLVWD's service to areas in and adjacent to the City of Scotts Valley have their own unique set of needs.

SLVWD holds a critical role not only because of its management of the water system and watershed, but also because it is a public agency that serves essentially the entire unincorporated Valley (and a bit beyond) AND is also headquartered in the Valley, managed by an elected board that is accountable to local voters.

Miller Maxfield recognizes at an intuitive level how important it is to understand the Valley and the way it relates to SLVWD. Respect for ratepayers and the Valley way of life is foundational to successfully supporting the District's communications and outreach efforts. Miller Maxfield is experienced, qualified and well positioned to provide all services required to meet SLVWD's goals.

Identification of Prime Consultant

Miller Maxfield, Inc.
133 Mission Street, Suite 101
Santa Cruz, CA 95060

Legal entity: Corporation
Contact: Bill Maxfield, Principal
133 Mission Street, Suite 101
Santa Cruz, CA 95060
Phone: 831-227-6469
Email: bill@millermaxfield.com

Miller Maxfield Team

The Miller Maxfield team includes:

Principals: 2
Senior Director: 1
Community Engagement Managers: 2
Creative Services Manager: 1
Graphic Designers: 2
Content Creator: 1
Special Projects/Office Manager: 1

Total number of team members: 10

Identification of Sub Consultant

Colleen Valles, Technical Writer
522 Flora Lane
Scotts Valley, CA 95066

Legal entity: Sole Proprietor
Contact: Colleen Valles
522 Flora Lane
Scotts Valley, CA 95066
Phone: 831-524-6765
Email: colleen@colleenvalles.com

Organization and Experience of the Team

The Miller Maxfield team assigned to SLVWD will consist of Bill Maxfield (Principal), Jennifer Murray (Senior Director), Tiffany Martinez (Community Engagement Manager), Natasha Del Rio (Creative Services Manager) and Colleen Valles (Technical Writer).

Jennifer Murray will serve as Team Manager. In this role, Jennifer will drive strategy development, ensure reporting and budgeting goals are met and provide quality control. Jennifer brings expansive experience in client services, including nearly nine years at Miller Maxfield, five of which included service to SLVWD. Jennifer's specific experience includes developing and executing outreach plans for many water agencies. Her experience with water agencies, has included management of every aspect of community outreach, including media outreach, writing, community meetings and workshops, collateral materials creation and production, crisis communications, social media strategy, website development and more.

Tiffany Martinez will serve as day-to-day contact, and will be responsible for generating content and ensuring all activities and deadlines are met. Colleen Valles will provide technical writing services. Natasha Del Rio will hold primary responsibility for all graphic design and printed production services. Bill Maxfield will provide oversight and strategic input, as well as ensure accountability. Please see below for Miller Maxfield's organization chart and team resumes.

In addition to day-to-day communication SLVWD will have with Tiffany, Jennifer and Bill will be available for direct contact with the SLVWD team as needed for scheduled and unscheduled meetings.

Most members of the Miller Maxfield team have worked together for numerous clients, especially on work related to the water industry. Current/recent examples include Santa Margarita Groundwater Agency, Pajaro Valley Water, Scotts Valley Water District, Santa Cruz Water Department and Salinas Valley Basin Groundwater Agency. Colleen Valles will join the team in support of SLVWD, augmenting Miller Maxfield's capacity to distill and explain complex water concepts and policies by leveraging her experience in the industry and background as a journalist.

The Miller Maxfield team approach will be rooted in our core values of accessibility, responsiveness and a high level of collaboration among members of the Miller Maxfield team, as well as with the SLVWD team. The Miller Maxfield team will operate through a hybrid office-home work plan, with time in the office anticipated to be at least 50% of the time. The team will adapt to SLVWD's preferred methods of communication, anticipating some combination of email, text, phone, Zoom and in-person communication.

Miller Maxfield anticipates there will be routine communication with the SLVWD team through regularly scheduled meetings to review progress toward specific outreach plans. Regular meetings of the Admin Committee and marketing team (to be attended by at least two members of the Miller Maxfield team), will undoubtedly be combined with frequent email, etc., as well as visits to the District offices and field operations, which could occur with some spontaneity depending on circumstances. The Miller Maxfield team is prepared to embrace this model in collaboration with the SLVWD team.

12-Month Planning Schedule

Miller Maxfield proposes a two-phase approach to delivery of a 12-month planning schedule. Phase 1 will focus on planning and Phase 2 will focus on execution of core strategies. It is anticipated there may be overlap between the two phases.

Throughout both the planning and execution phases, Miller Maxfield will provide all strategic development and project management required, attend regular meetings with the SLVWD team and will monitor monthly tasks to ensure strategies are on track and delivered within the approved budget. Miller Maxfield will also provide a monthly written report of activities and outcomes.

Phase 1: Planning August – September, 2022

The planning phase will begin with communication and collaboration with SLVWD's executive and communications team members to review current activities and messaging, as well as review and confirm key SLVWD projects and goals for the 12-month period. This due diligence will enable Miller Maxfield to identify opportunities and challenges for outreach and marketing activities and timelines as we proceed through the planning phase.

From these initial meetings and research, Miller Maxfield will create an actionable outreach plan, including specific strategies and tasks for community events/workshop concepts. The plan will also include details related to roles for Miller Maxfield and SLVWD, responsibilities and timing.

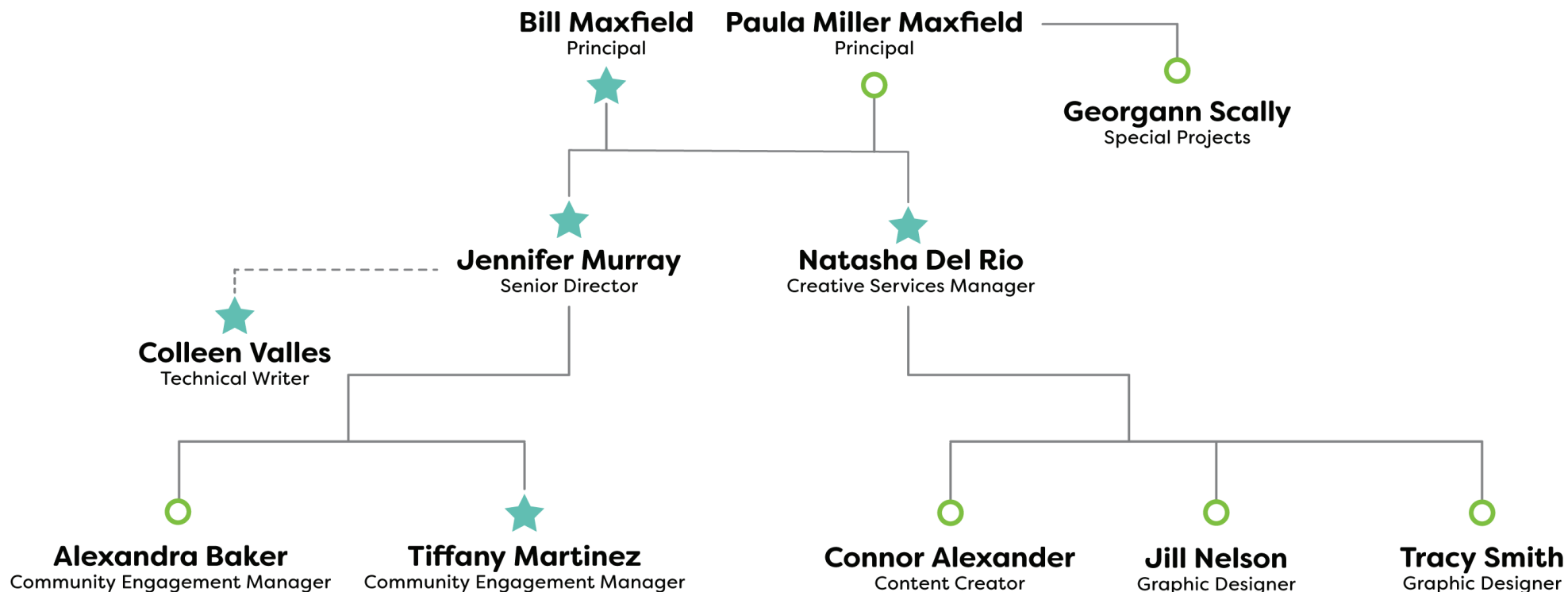
Phase 2: Execution October 2022 – July 2023

Miller Maxfield will transition from the planning mode into execution of the outreach plan, which is anticipated to include a mix of ongoing monthly activities (social media, etc.) and project-specific activities such as community events/workshops and related collateral materials.

We anticipate we will recommend a series of community meetings (target of three) taking place November, January and February. However, the actual number of workshops and timing of workshops is dependent on SLVWD goals and relevant milestones related to funding, etc.

Some activities may cross over between ongoing monthly activities and project-specific work, such as media relations. For example, media outreach (including press releases, etc.) and media tours could be timed to be integrated with community events/workshops.

Organization Chart



★ SLVWD Primary Team

Resumés



Bill Maxfield, Principal

For 25 years, Bill has been creating and implementing innovative communication plans. He is known for his unique ability to transform communication challenges into

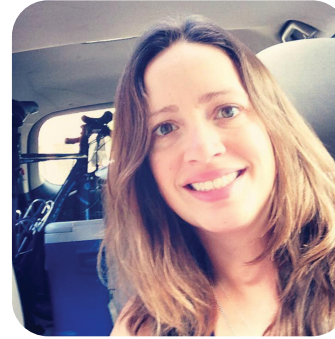
communication wins, a skill he has leveraged through positions held in the public, private and nonprofit sectors. In addition to communication roles held at Silicon Valley start-ups, Bill served as Assembly Budget Committee Chair John Laird's communications director for five years until Mr. Laird's term ended. Today, Bill leads the team at Miller Maxfield, Inc. through strategic planning, message development, community engagement, media relations and crisis management. Bill has developed Miller Maxfield's presence in the public sector, working on behalf of many of the region's most important organizations and projects.

Relevant Work History

- Principal, Miller Maxfield, Inc. (2009-present)
- Communications Director, CA State Assemblymember and Budget Committee Chair John Laird, Sacramento and Santa Cruz, CA (2004-2008)

Education

Bill graduated from San José State University with a degree in Political Science-Public Administration and a minor in Business Management.



Jennifer Murray, Senior Director

Jennifer Murray is an award-winning writer, editor and multimedia journalist. A communications professional with more than a decade of experience crafting stories and managing content distribution

in both online and traditional formats, Jennifer keeps her finger on the pulse of emerging communication channels. Jennifer also delivers as a stellar event planner, known for her organization and management of the beloved Mole & Mariachi Festival and numerous local triathlon events. Jennifer is the senior director at Miller Maxfield. In this role, she coordinates projects, provides strategic and creative input to clients, secures earned media coverage through compelling press releases, manages social media accounts on multiple platforms, oversees advertising campaigns, develops website content and collaborates with clients to tell their stories.

Relevant Work History

- Senior Director, Miller Maxfield, Inc., Santa Cruz, CA (2014-present)
- Senior Local Editor, Patch.com (AOL Newsmedia), Watsonville, CA (2010-2013)
- Reporter, Santa Cruz Sentinel, Santa Cruz, CA, (2006-2010)

Education

Jennifer graduated from Southern Oregon University with a degree in Communications-Journalism and a minor in Ethics.



Tiffany Martinez, Community Engagement Manager

Skilled in a variety of community outreach and engagement strategies and tactics, Tiffany brings a high level of organization, attention to detail and tenacity to her work. Tiffany served as the branding and communications associate for YWCA of Monterey County. In that role, Tiffany lead the planning and execution of several community awareness campaigns including Stand Against Racism, Human Trafficking Awareness and the MC Gives fundraising campaign. Tiffany served as the head editor for SJSU's Communication Studies Program/Cognella Academic Publishing, co-authoring auxiliary materials for the "Empowering Public Speaking" textbook written by Deanna Fassett & Keith Nainby.

Relevant Work History

- Community Engagement Manager, Miller Maxfield, Inc., Santa Cruz, CA (2021-present)
- Executive Assistant/Communication & Branding Associate, YWCA Monterey County, Salinas, CA (2020-2021)
- Head Editor, SJSU Communication Studies Program/Cognella Academic Publishing, San Jose, CA (2020)

Education

Tiffany graduated from Cal State University-Channel Islands with a degree in Business Communications and from San José State University with a master's degree in Communication Studies.



Natasha Del Rio, Creative Services Manager

Natasha Del Rio is an adept graphic designer with experience working with a broad set of organizations from corporate brands to small businesses. Natasha's artistic sensibilities are best described as modern and whimsical. With a wide-ranging skillset including hand-made, digital and interactive media, Natasha delivers on-brand designs across different elements. Natasha's experience working in the corporate sector where she created prototypes, brand guides, designed ecommerce pages and public-facing collateral have benefitted from her diverse skillset. Natasha serves as the lead designer for a variety of projects that utilize her expertise in illustration, print design and brand design. As Creative Services Manager, Natasha also manages Miller Maxfield's team of design resources.

Relevant Work History

- Creative Services Manager, Miller Maxfield, Inc., Santa Cruz, CA (2022-present)
- Graphic Designer/Production Coordinator, AdVision Outdoor, Tuscon, AZ (2019-2022)
- Freelance Designer, Self-Employed, Santa Cruz, CA (2018-2022)

Education

Natasha graduated from the University of California, Santa Cruz with a degree in Art & Design: Games & Playable Media.



Colleen Valles, Technical Writer

Colleen Valles is an award-winning writer who helps organizations tell their sustainability stories. After nearly a decade spent as a reporter, which included covering environmental issues for the Associated Press, she turned her research and writing skills toward communications in complex industries including housing and land use, water, transportation, energy and education. Colleen has written a variety of content for publications, public and private organizations, executives and elected officials, always with an eye toward making complicated issues engaging and relatable. Her work combines the two things she's passionate about: writing and making the world a better place.

Relevant Work History

- Digital Brand Journalist, Cella, (2022-present)
- Freelance Sustainability Writer, Freelance, Sacramento, CA (2006-present)
- Public Information Representative II, Santa Clara Valley Water District, San José, CA (2015-2019)

Education

Colleen graduated from the University of California, Santa Barbara with a degree in Arts, English Language and Literature.

Experience and Past Performance

Water agencies in the Monterey Bay area are continuously planning and implementing important programs and infrastructure projects to meet the demands created by impacts from climate changes, drought cycles, supply challenges, aging infrastructure and regulatory requirements. Communication and connection with ratepayers is vitally important.

The Miller Maxfield team has developed an intuitive level of expertise about what works and what does not work when it comes to developing and implementing public outreach plans. What follows are summaries that describe our experience on behalf of several local clients, including water agencies and other public-serving organizations that have relevance to the anticipated work in support of SLVWD. Summaries include Pajaro Valley Water Management Agency, Central Coast Community Energy, Friends of Santa Cruz State Parks, Santa Margarita Groundwater Agency and SLVWD.

Pajaro Valley Water Management Agency (PV Water)

2016 - present

PV Water exists for the purpose of ensuring sustainable groundwater resources for the Pajaro Valley, with a footprint that covers portions of Santa Cruz County and Monterey County. The agency utilizes a Basin Management Plan (BMP) to reduce groundwater overdraft and seawater intrusion. The BMP includes projects and strategies that process and deliver recycled water, develop new water supplies and reduce demand through conservation.

Miller Maxfield serves PV Water to support a wide variety of communication and outreach projects, with a special focus on key infrastructure programs such as the College Lake Integrated Resources Management Project and the Watsonville Area Water Recycling Facility.

Activities have included strategic counsel, securing earned media coverage through writing and distributing press releases, printed and digital materials design and production, development of key messaging documents including frequently asked questions, social media content and execution, and production of web, radio and TV advertising.

Our work on the College Lake project spans several years. Beginning in 2022, major activities will shift to focus on the construction phase of the project. A pipeline associated with the project will span much of the City of Watsonville, creating significant impacts for motorists and other residents. Miller Maxfield is anticipated to support PV Water throughout the construction phase by executing community outreach meetings, advertising, direct mail, project signage, social media, earned media and more.

Contact: Brian Lockwood, General Manager, (831) 722-9292
Average Annual Budget: \$35,500

See examples on [page 17](#)

Experience and Past Performance

Central Coast Community Energy (formerly Monterey Bay Community Power)

2016 - present

Miller Maxfield was selected in 2016 to support communications and marketing needs for Monterey Bay Community Power during the pre-JPA/agency formation phase for the effort to establish the entity in Monterey, San Benito and Santa Cruz Counties.

During the pre-JPA/agency formation phase for Monterey Bay Community Power, we provided messaging, branding, social media, media relations, public affairs and community outreach services. Specific services included establishment of core messaging and talking points, design and production of printed materials and giveaway items, PowerPoint presentations, launch and maintenance of social media channels, email newsletter, local media engagement through press releases and story pitching, Spanish translation of all printed materials, development and execution of community engagement events, strategic counsel and creation of an award-winning video.

In 2020, Miller Maxfield was awarded the opportunity to rebrand Monterey Bay Community Power as Central Coast Community Energy. The new name and brand reflect the agency's expansion into San Luis Obispo and Santa Barbara Counties. The rebrand work included brand story development, logo creation (informed by a survey-based customer and stakeholder input process), supporting icons, email newsletter template, brand usage guide, print and digital ad campaigns, website review, brand rollout strategy, and full graphic design and marketing support through and beyond the rebrand launch.

Miller Maxfield continues to provide strategic counsel and graphic design services on an annual basis.

Contact: Peter Berridge, Manager of Energy Communications,
(831) 641-7204

Average Annual Budget: \$85,000

See examples on [page 17](#)

Experience and Past Performance

Friends of Santa Cruz State Parks

2009 - present

Friends of Santa Cruz State Parks (Friends) works in close partnership with California State Parks through a co-management agreement to support 32 state parks, beaches and historic parks, covering all of Santa Cruz County and coastal San Mateo County. Miller Maxfield serves all of Friends' marketing/communications needs. Friends supports State Parks by providing over 100 visitor service aides who are Friends' employees, funding numerous State Parks interpreter positions, operating ParkStores and other visitor services, and funding a wide variety of capital improvement projects.

Miller Maxfield's scope of work for Friends includes all of the organization's messaging, media relations, social media, video and photography, graphic design, website, branded merchandise, event promotion and strategic communications planning. Miller Maxfield also served as the event producer/manager for the Mole & Mariachi Festival that ran from 2013-2019.

The San Lorenzo Valley and surrounding area are a major focus of Friends' work because they support Henry Cowell Redwoods (also including the Fall Creek unit of the park) and Big Basin Redwoods. Miller Maxfield's work for Friends took on a new level of importance and urgency during and after the CZU Lightning Complex Fire. While Big Basin was still on fire, we launched the Friends Fire Fund to raise money for those who lost their homes in the park and to help fund the rebuilding process. The Miller Maxfield team, many of whom are proposed to serve SLVWD, has visited Big Basin numerous times to help document and tell the story of fire recovery and the planning for rebuilding.

Miller Maxfield's work for Friends related to the CZU Fire has included collaboration with State Parks leadership, narrative development, publicity in support of fundraising, media events and media tours, social media content, and production of a [video and 3D scan](#) of the park to mark the one-year anniversary of the fire. Most recently, Miller Maxfield coordinated the reopening of the park by developing the online reservation system, creating signage and graphics, coordinating media, providing photography support and promoting the reopening through social media.

Contact: Bonny Hawley, Executive Director, (831) 325-1504
Average Annual Budget: \$100,000

See examples on [page 18](#)

Experience and Past Performance

Santa Margarita Groundwater Agency 2018 - 2022

Following initial one-time projects to create the logo and website for Santa Margarita Groundwater Agency, Miller Maxfield was selected to be the communications and outreach support for the agency. Our work was generally organized into two tracks: 1) development of the Communications & Engagement Plan as a required component of the agency's state-mandated Groundwater Sustainability Plan (GSP), and 2) execution of community outreach and engagement activities throughout the agency's work to create and submit the GSP.

Contact: Piret Harmon, SMGWA staff, (831) 600-1902

Average annual budget: \$35,000

See examples on [page 18](#)

Miller Maxfield's community outreach and engagement work spanned a broad range of strategies and activities. A core highlight was assisting with the concept and execution of the agency's 2019 three-part series of community meetings, held in Felton in January, February and March. Our specific responsibilities included creation and production of all printed materials, program/speaker development, event publicity and promotion, on-site event support, video production and media relations.

Other notable highlights included writing a summary of each monthly board meeting, including distilling highly complex concepts; creation of numerous explainer graphics to increase understanding of the GSP; supporting execution of groundwater basin public tours, including concept, materials and publicity; ghost-writing and placing op-eds; executing the community event, "Drought: Global Challenge, Local Solutions"; development of the Communications & Engagement Plan, informed by a high degree of collaboration with staff; and layout/design for the GSP final document.

Experience and Past Performance

San Lorenzo Valley Water District 2013 - 2018

Miller Maxfield was hired by the San Lorenzo Valley Water District to support the District's ongoing CIP-driven process to fund and upgrade its water system. To support the district's CIP process, we designed and promoted a series of community meetings to encourage public input. In addition, we increased public understanding of the local watershed and key district projects, such as the replacement of Probation Tank. For the Probation Tank, we supported the District by helping to tell the story of the tank, which was accomplished primarily by pitching local media and arranging tours of the tank site that featured remarks and explanation by District representatives. We repeated this approach for other elements of the water system, including pipelines and water treatment.

A marquee project was the grant-funded Intertie Project, which linked previously independent regions of the District and also connected the District to neighboring Scotts Valley Water District for emergency water needs. The Miller Maxfield team provided messaging and continuous updates about the project, culminating in planning and execution of a press conference to celebrate the completion of the project.

Disaster response communications support was a service Miller Maxfield remained on standby to provide, and did so following damage to the Lyon Treatment Plant access road. Our services included writing and distributing updates to media, arranging media access to the site and assisting with follow up responses to media. Similar support was provided for other incidents, such as the Bear Creek Road water main break.

In addition to disaster response support, crisis communications support was also provided to the District during some notable and highly challenging circumstances. Miller Maxfield delivered counsel and advice that emphasized transparency, responsiveness, best practices and professionalism.

Throughout Miller Maxfield's tenure with SLVWD, we supported the District's communications needs related to watershed protection. This was achieved by promoting important watershed projects, such as the Fall Creek Fish Ladder. In addition, we promoted grant awards, the annual Valley Women's Club River & Road Clean Up, Groundwater Awareness Week and more.

Miller Maxfield also provided comprehensive support for the District's response to the 2014 drought, including messaging, media relations, bill inserts, postcards, banners and more.

Services and skillsets provided by Miller Maxfield included writing, media relations, strategy and messaging, community outreach and event management, graphic design, advertising, social media, printing, direct mail production and crisis communications.

Contact: Rick Rogers, District Manager, (831) 338-2153
Average annual budget: \$44,000

See examples on [page 19](#)

Firm's Local Experience

The fact that Santa Cruz County is the second smallest county in California by area can be hard to believe, especially given the immense diversity of our county in terms of geography, individual community characteristics, politics and policy-level challenges. The service area covered by the San Lorenzo Valley Water District, as compared with other areas of the county, is certainly representative of this dynamic.

Every member of the Miller Maxfield team is a resident of Santa Cruz County. Having a solid understanding of the San Lorenzo Valley and how it fits within the rest of the county is a point of pride for Miller Maxfield. For several members of the team, connections to SLV run deep. Bill Maxfield's grandparents ran Camp Campbell in the 1950s and he grew up in the Santa Cruz Mountains, spending summers at daycamp at Highlands Park and birthdays at Roaring Camp. As a young adult, Bill served as president of the North County Democratic Club. Paula Maxfield's family spent summers in Felton in the 1960s and 1970s. Paula and Bill were married in Ben Lomond. Jennifer Murray worked for several years as a daily reporter for the Santa Cruz Sentinel, often spending her days covering news in the Valley.

Beyond the personal stories of the Miller Maxfield team, the firm has more professional Santa Cruz County experience, as well as knowledge of SLVWD and local issues, than any other communications, public relations or marketing firm. Marking 20 years as a locally owned business, Miller Maxfield has served well over 100 local clients, many of which either are based in the Valley, provide services for Valley residents or are otherwise associated with the Valley.

Key local issues include wildfire prevention and suppression; CZU fire recovery, especially with regard to permitting, codes and construction-related issues; housing affordability and availability; economic recovery; and, of course, water supply. Navigating the policymaking landscape and politics is complex in the unincorporated San Lorenzo Valley, with jurisdictions and areas of influence shared across multiple state agencies, county departments and agencies, LAFCO, special districts, JPAs and political representation (which has also recently been impacted by redistricting). And SLVWD's footprint and operations intersect with nearly all them.

Providing water that reliably comes out of customers' taps, SLVWD often operates unnoticed in the community and yet is everywhere at the same time. From Boulder Creek to Felton and the edges of Scotts Valley, SLVWD's system includes pipes, pumps, tanks, treatment facilities and a massive watershed. It's a totally unique system that combines tried-and-true legacy infrastructure with modern web-connected technology, surface water sources with groundwater wells, suburban-style neighborhoods with remote mountain properties, and well-established service areas with newly-merged services areas.

The impact in the community is vast as well. SLVWD plays an important and equalizing role by striving to provide water at rates that are affordable for all residents. It's a tough balancing act because the cost of service is always increasing, driven significantly by the expense of upgrading aging (and/or fire-damaged) infrastructure. Passing along those costs to customers can create economic hardship for some, especially when combined with the ongoing crisis in the cost of housing. The District is also highly integrated in other facets of life in the Valley, especially including work with fire districts, watershed protection efforts, schools and libraries.

Because of the District's central position with regard to life in the Valley, the relationships the District builds and maintains are critical. From the Chamber of Commerce to the school district, from service clubs to fire stations, from news outlets to other water agencies, and from legislators to law enforcement and beyond, productive relationships are essential to the District's success. But most of all, the District's success depends on building trust with ratepayers.



Creative Alternatives

The following creative alternatives are recommended for consideration by SLVWD. Proposed cost estimates are included in the Proposed Fee section of this proposal.

1. Videos

Create a series of 2-3 videos of varying length for use as social media and website content. The videos could also be used as assets in community presentations. In partnership with a local video production company, Miller Maxfield would produce the videos, including concepts, scripts, branding, shoots and project management. The addition of video to SLVWD's community outreach efforts would help the District to tell its story, explain key concepts, encourage efficient use of water, etc.

2. Advertising

Develop an annual advertising plan that would include an ongoing advertising presence with key local media outlets, including but not limited to the SLV Post, Press Banner, Mountain Bulletin and KBCZ. Advertising would be used to augment other core strategies (such as media outreach, social media, etc.) to deliver important messages related to public workshops, drought, critical projects, etc. Miller Maxfield would develop the advertising plan, as well as create and place the advertising. Miller Maxfield bills only for time used to create and manage the advertising and does not charge mark-ups or any other add-on fees.

3. Fleet Messaging

Create simple and impactful messaging and related graphics to be placed on SLVWD's vehicle fleet. The messaging would be used to amplify other District messaging related to drought, watershed management, etc.

Exceptions to this RFP

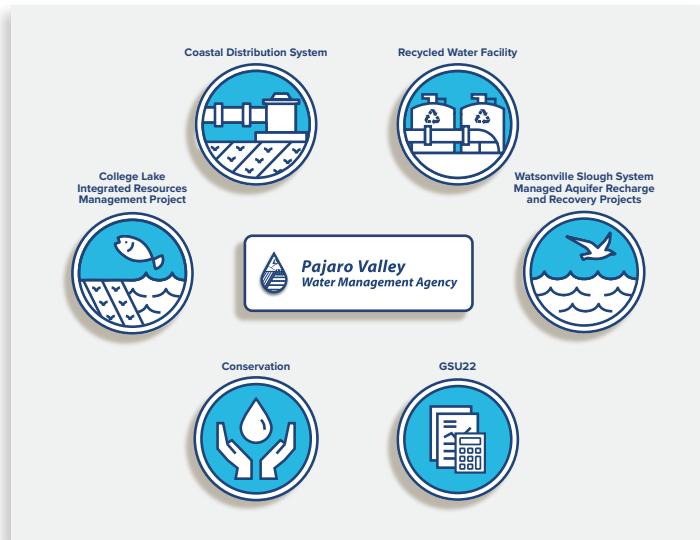
I, Bill Maxfield, principal of Miller Maxfield, Inc., certify that the RFP has been read in its entirety and we take no exceptions to this RFP including, but not limited to the Consultant Services Agreement.

Signed:

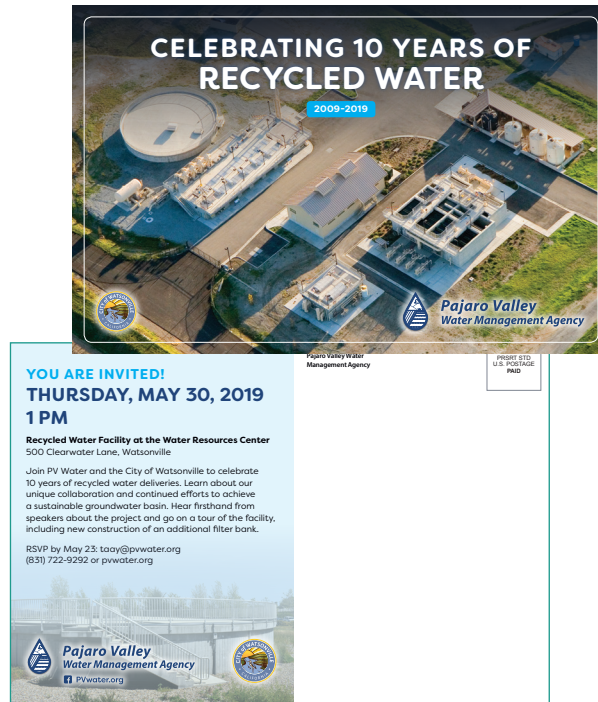


Bill Maxfield

Work Samples: Pajaro Valley Water Management Agency



Infographic

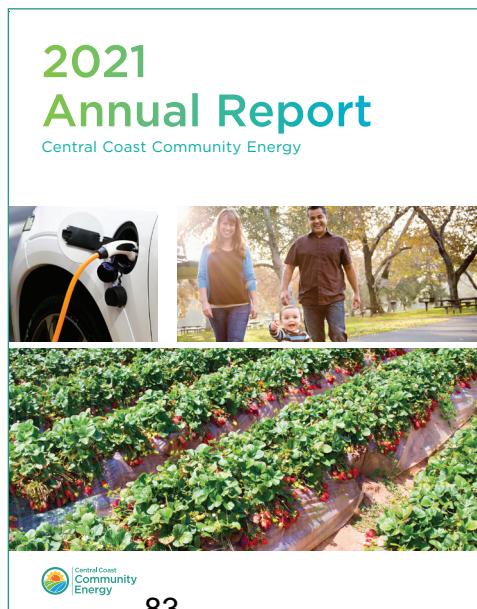


Video: "Pajaro Valley Water Management Agency 2021 TV Ad - English"



[Watch here](#)

Work Samples: Central Coast Community Energy (formerly Monterey Bay Community Power)

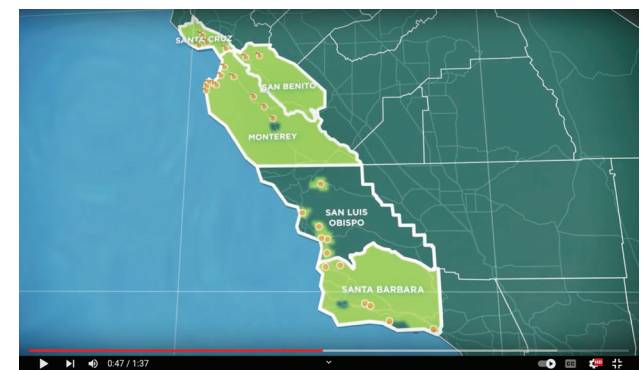


Digital Ad: English



Digital Ad: Spanish

Video: "3CE Name Change Announcement"



[Watch here](#)

Work Samples: Friends of Santa Cruz State Parks



Big Basin Banner



Fire Fund Postcard

Video: "Big Basin One Year Later"



[Watch here](#)

Work Samples: Santa Margarita Groundwater Agency

Admin Comm: 8.9.22

SANTA MARGARITA Groundwater Agency

Santa Margarita Groundwater Agency (SMGWA) is a local Groundwater Sustainability Agency created under the 2014 Sustainable Groundwater Management Act (SGMA).

SMGWA was formed in June 2017 by three public agencies: Scotts Valley Water District, San Lorenzo Valley Water District and County of Santa Cruz, and has a responsibility for planning and implementing activities that ensure sustainable use of the groundwater resources in Santa Margarita Basin.

- Groundwater is the primary source of drinking water for majority of the residents in the North Santa Cruz County.
- Groundwater feeds local streams that support fishery habitats.
- Rainfall has been the only source of recharge to the basin.

Groundwater Use in Santa Margarita Basin
(2016, in acre feet)

Scotts Valley Water	1,218
San Lorenzo Valley Water	1,173
Mount Hermon	138
Small Water Companies	80
Commercial/Agricultural	100
Private Residential Wells	220

Event Display Board

COMMUNITY MEETINGS

The Santa Margarita Groundwater Agency (SMGWA) is hosting a three-part "Understanding Our Water" educational series to engage and inform all people who rely on the water supply from the Santa Margarita Groundwater Basin.

JANUARY 12
Land Use and Water: How Much Does Growth Matter?

FEBRUARY 9
Water Budgets: How Do We Balance All Needs?

MARCH 9
Managing Groundwater: How Can We Prepare for an Uncertain Future?

The Santa Margarita Groundwater Basin is the major water source for communities in the San Lorenzo Valley, Scotts Valley, the City of Santa Cruz and unincorporated areas of County of Santa Cruz.

SMGWA is a Groundwater Sustainability Agency formed in June 2017 and includes Scotts Valley Water District, San Lorenzo Valley Water District and the County of Santa Cruz.

Felton Community Hall, 6191 Hwy 9, Felton
All meetings are 9am-1pm
Learn more: smgwa.org

SANTA MARGARITA
Groundwater Agency

Event Promo Flyer

SANTA MARGARITA Groundwater Agency

Drought: Global Challenge, Local Solutions

JULY 31, 2021 10AM TO NOON
SKYPARK, 361 KINGS VILLAGE ROAD, SCOTTS VALLEY, CA

Learn about the work Santa Margarita Groundwater Agency is doing to create a sustainable water future in the San Lorenzo Valley and Scotts Valley.

Join Us!
Kids Activities!

Scan me to sign up!

Santa Margarita Groundwater Agency tiene un evento comunitario gratuito centrado en los recursos hídricos locales. Únase a nosotros en SkyPark en Scotts Valley el 31 de julio desde las 10 AM a 12 PM. Todos están invitados y bienvenidos.

Event Promo Flyer

Work Samples: San Lorenzo Valley Water District



COMMUNITY CHATS

San Lorenzo Valley Water District Acting District Manager Rick Rogers has been hosting a series of informal drop-in coffee chats to talk with District customers, gather feedback on issues and answer questions.

Catch the last one!
October 24
WEDNESDAY 9-10 AM

Heavenly Roadside Café
1210 Mt Hermon Road, Scotts Valley
Open to the public

[SLVWD.COM](https://www.slvwd.com)

Event Promo Flyer

Dear Customer,

San Lorenzo Valley Water District is requesting that customers limit water use this summer due to several factors.

The District is constructing a new water storage tank to service your neighborhood. The new 500,000-gallon steel tank will replace the "Probation Tank," an old, leaking, 100,000-gallon redwood tank, and will increase fire protection for your area. A temporary water storage system that holds 30,000 gallons is in place for the duration of construction.


The District is also affected by recorded rainfall that is 56% of normal this year. In addition, the drought has had a long-term impact on groundwater levels and well efficiency in your area. Currently, two of the three wells serving your area are offline. One is being rehabilitated; the other has reached the end of its life expectancy and is in the process of being replaced.

Please take immediate action to reduce your water use by 20% as the District improves infrastructure in your area.

We appreciate everything you do to ensure your community has a sufficient water supply during summer months and through the end of the construction period. For water conservation tips, please visit watersavingtips.org.

Thank you!


Learn more at www.slvwd.com.



Garden Irrigation
Please limit watering time; or after 5 pm. Shut off nozzle; all hoses and overwatering. For more tips, visit s

San Lorenzo Valley Water District
13060 Highway 9
Boulder Creek, CA 95006

PRIST STD
U.S. POSTAGE
PAID
Boulder Creek, Ca
PERMIT NO. 210



San Lorenzo Valley Water District
13060 Highway 9
Boulder Creek, California 95006

Stage 2 Outdoor Water Restrictions Now In Effect

- No outdoor watering between 10am-5pm.
- No outdoor watering on Monday.
- Outdoor irrigation is permitted only three days a week.
- If your address ends in an EVEN number, water only on Tuesday, Thursday and Saturday.
- If your address ends in an ODD number, water on Wednesday, Friday and Sunday.
- On your watering days, limit irrigation to 15 minutes per assigned day.
- Do not wash down hard or paved surfaces.
- Shut-off nozzles are required on all hoses.
- Penalties will apply when restrictions are violated.

To help you manage your water use, monthly billing begins in May.

We're here to help. For additional information and free water conservation devices, as well as conservation tips and rebates, visit [slvwd.com](https://www.slvwd.com) or facebook.com/SLVWaterDistrict, or call 831.338.2153.

83 of 90



Water supply impacted by infrastructure improvements & drought

CONSERVE TO PRESERVE
SLVWD.COM



Help Out— We're in a Drought

A Drought Emergency has been declared for the San Lorenzo Valley Water District.

Stage 2 Outdoor Water Restrictions in effect, beginning May 1.

Please help our community cut overall water use by 20%.

We're all in this together.

[slvwd.com](https://www.slvwd.com)



Writing Sample: Friends of Santa Cruz State Parks

FOR IMMEDIATE RELEASE

June 30, 2022

Big Basin Redwoods State Park Reopens July 22 with Reservation-Only Day-Use Access

Limited public access to the fire-scarred park returns almost two years after CZU Fire

BOULDER CREEK, Calif. — California State Parks and Friends of Santa Cruz State Parks today announced Big Basin Redwoods State Park will partially reopen July 22 for limited day-use access through a reservation system. Reservations will be available starting July 1.

Big Basin has been closed to the public since the [CZU Lightning Complex Fire](#) tore through the park in August 2020. Flames engulfed more than 97 percent of the park on August 18, 2020, destroying nearly every structure, including the Park Headquarters, campgrounds and housing for park employees. Approximately 18,000 acres burned inside the park boundary. The park is still without electricity, water, flush toilets, phone service or buildings.

“The changes to Big Basin are profound, but the forest is starting to recover and it’s amazing to witness,” said California State Parks Santa Cruz District Superintendent Chris Spohrer. “We want to share the recovery process with visitors, including telling the story of what happened, the status today and the plans for reimagining the park. We’re excited to be able to welcome visitors back on a limited basis as we near the two-year anniversary of the fire.”

“Managing parks for a healthy future for environmental systems as well as humanity could not be more important at this moment in history,” said California State Parks Director Armando Quintero. “We welcome all Californians and visitors from around the world as we enter the next era for this iconic and much beloved state park.”

Limited Reopening

The day-use-only reservation system will provide public access to a small area of the fire-damaged park. Visitors will be able to explore the Redwood Loop and access about 18 miles of fire roads near the historic park core. Services will be limited.

The public access to Big Basin coincides with the reopening of Highway 236, the main thoroughfare through the park. Once open, drivers may go through the park on Highway 236 without stopping. All parking within the park will be by reservation only. Visitors can also access the park by bicycle or METRO bus route 35, which runs on weekends only, without a reservation.

“We are proud to partner with State Parks to bring the public back to Big Basin,” Friends of Santa Cruz State Parks Executive Director Bonny Hawley said. “The devastation of the CZU Fire reminded all of us how beloved and special this park is to generations of visitors. While it will not look like the same Big Basin visitors remember, we hope visitors will enjoy making new memories during this pivotal time for the park.”

[Friends](#), through its unique position as co-management partner with State Parks, will manage the Big Basin Day-Use Reservation System. Reservations will be available online at [Big Basin Redwoods State Park](#) or by phone (831) 338-8867. Most spaces will be available by up to 60 days in advance, while a limited number of reservations will be released three days before the visit date. Initially, 45 spots will be offered daily. Pre-registration is required. No day-of, drive-up entry will be available. Entry is \$6, plus a \$2 reservation fee, and will provide day-long access to the park. State Parks day-use passes, and other park entry programs will be honored, including the recently expanded Golden Bear Park Pass, which provides free access to State Parks for families receiving CalWORKS benefits and others.

Writing Sample: San Lorenzo Valley Water District

FOR IMMEDIATE RELEASE

September 26, 2017

SLV WATER DISTRICT BOARD TAKES ACTION ON CLIMATE CHANGE POLICY AND CONFIRMS SUPPORT FOR PARIS CLIMATE ACCORD

NEW CLIMATE ACTION PLAN AND ENERGY/CLIMATE POLICY TO BE IMPLEMENTED

BOULDER CREEK, CA – The San Lorenzo Valley Water District (SLVWD) today announced the Board of Directors has unanimously (5-0) approved a resolution that confirms the district's commitment to the goals of the Paris Climate Accord and sets new goals and policies on energy efficiency, distributed energy generation and energy procurement, and climate change adaptation.

"San Lorenzo Valley Water District's commitment to the Paris Agreement, and their plans to set specific goals to eliminate carbon from their operations, is a prime example of how local and state governments have begun leading the charge on climate action," said John Laird, California Natural Resources Secretary. "We all need to be working toward a post-carbon future."

The resolution approved by the Board of Directors includes:

1) SLVWD's commitment to the elements of the Paris Agreement that are applicable to the Water District.

2) Direction to SLVWD staff to prepare a Climate Action Plan and District Energy/Climate Policy, elements of which could include:

- Inventory existing energy uses and identify cost savings/energy efficiency priorities.
- Reduce and eventually eliminate greenhouse gas (GHG) emissions resulting from activities related to serving water to the San Lorenzo Valley Water District community.
- Identify and ensure energy and water reliability/resiliency with regard to climate impacts experienced locally.
- Emphasize communication, transparency and education by affirming the importance of education, training, public awareness, public participation and public access to information and cooperation.
- Expand focus on water conservation because it results in conserving electricity, reduces greenhouse gas emissions and promotes sustainable use of water resources.
- Explore development of renewable energy sources, which could include solar, wind, micro hydro, anaerobic digestion or purchasing power through Monterey Bay Community Power.
- Produce an annual report on energy use, conservation and cost.

- Identify strategies for identifying, assessing and adapting to climate change impacts likely to occur in the District's service area.

3) Implementation of the approved plan and policies.

BACKGROUND

In September 2008, SLVWD adopted resolution No. 2 (08-09) Climate Change and Water Resource Management through which the district committed to implementing the goal of the California Global Warming Solutions Act (AB 32) to reduce GHG emissions to 1990 levels by 2020; and to further reduce GHG emissions to 80% below 1990 levels by 2050.

Several additional pieces of legislation related to climate change and energy efficiency have come into force since AB 32. These seek to improve energy efficiency, building energy performance, and increase renewable energy generation in California. The district's actions regarding climate action are both aligned with the state's goals, and may be able to take advantage of programs and funding sources supporting climate action.

The district has continued to exercise leadership in initiatives, programs and policies that address climate change while furthering the district's mission. The district has applied understanding of climate change and its impacts as appropriate in water supply plans, asset management and infrastructure plans, California Environmental Quality Act assessments and habitat conservation plans, energy management plans, business plans and strategic plans. It has also strived to minimize its greenhouse gas emissions, worked with the community to reduce its greenhouse gas emissions related to utilization and management of water resources, and enhanced community understanding of climate change and how climate change impacts the district's mission.

In August 2017 the SLVWD Environmental Committee met and discussed a three-step outline to reduce and eventually eliminate greenhouse gas emissions resulting from district activities. The committee requested that the outline and a resolution be agendized for consideration and possible action.

ABOUT THE SAN LORENZO VALLEY WATER DISTRICT

The San Lorenzo Valley Water District is located in the mountains of northern Santa Cruz County. The district serves more than 7,800 metered connections across approximately 160 miles of pipeline, supported by dozens of water tanks, pumps and wells. Established in 1941 and supplied by a mix of surface water and underground water sources, the district provides water to the communities of Boulder Creek, Brookdale, Ben Lomond, Zayante, Scotts Valley, Mañana Woods, Felton and Lompico. For more information, visit www.slvwd.com or www.facebook.com/slvwaterdistrict.

Writing Sample: Santa Margarita Groundwater Agency

Santa Cruz Sentinel

Guest Commentary | Community participation is key to future of water supply

By BRUCE MCPHERSON, LOIS HENRY and CHRIS PERRI
April 14, 2019 at 5:00 p.m.

In the Sentinel's March 24 story about the San Lorenzo River Symposium, the river was described as a "unifying force of nature." The same could be said of the Santa Margarita Groundwater Basin, which lies beneath much of the river's length, extends throughout the San Lorenzo Valley and Scotts Valley areas and provides water for water district customers and private well owners.

Approximately 40,000 people rely on water that is pumped out of the Santa Margarita Groundwater Basin through wells and delivered to taps every day. Most of us don't spend much time imagining what is happening deep under our feet in the basin. But a new state law, the Sustainable Groundwater Management Act, requires our community to take a closer look and create a plan to make sure the groundwater supply is sustainable for decades to come.

In response, the Santa Margarita Groundwater Agency was formed. The agency includes representatives from San Lorenzo Valley Water District, Scotts Valley Water District, County of Santa Cruz, Mount Hermon Association, City of Scotts Valley, City of Santa Cruz and private well owners.

What the state requires our community to do is challenging. Land development, population growth and climate change make planning for the future very complicated. The new state law requires us to face these challenges and work together as a community to create a plan.

The plan will not be created by unnamed government employees and elected officials. Our community must develop the plan together. Strong public engagement is both wanted and needed. So far, the response has been great.

A three-part "Understanding Our Water" educational series was hosted by the Santa Margarita Groundwater Agency in January, February and March. Each workshop included a keynote speaker, panel discussions with experts, break-

out sessions and informational displays. Approximately 100 people from Scotts Valley, the San Lorenzo Valley and Santa Cruz attended each four-hour event, all of which were held at the Felton Community Hall.

For many, the break-out sessions were the best part because attendees engaged directly with each other, water management staff and elected officials. Small groups huddled for discussion, then reported out their ideas and conclusions. At the end of each workshop, water agency managers answered questions from the audience.

The first workshop, "Land Use and Water: How Much Does Growth Matter?"; shared information on land use planning and how it relates to water supply. The keynote speech was by John Laird, former California Secretary of Natural Resources.

The second workshop, "Water Budgets: How Do We Balance All Needs?"; covered how water moves through the soil and rocks of the Santa Margarita Groundwater Basin (hydrogeology). Experts provided insight into the complicated relationship between groundwater and surface water, and explored the concept of "water budgets." Assemblymember Mark Stone was our keynote speaker.

At the final workshop, "Managing Groundwater: How Can We Prepare for an Uncertain Future?" audience members had the opportunity to challenge water agency managers in a discussion about myths and misconceptions about how groundwater is managed locally. We also listened to a sobering presentation by Dr. Bruce Daniels about climate change and its implications for our future. We also held a small group exercise about long-range water management scenarios.

For the full op-ed, visit: <https://www.santacruzsentinel.com/2019/04/14/guest-commentary-community-participation-is-key-to-future-of-water-supply/>



Engagement and Public Outreach

Stakeholder involvement and public outreach is critical to the GSP development and implementation because it helps promote the plan development, based on input and broad support. The following activities summarize involvement opportunities and outreach methods to inform target audiences and stakeholders. It is important to note that levels of interest will evolve and shift according to the GSP's development stage.

Goals and Outcomes

An email listserve of interested persons and organizations is created and maintained. The listserve includes stakeholders that represent the region's broad interests, perspectives and geography. It is developed by leveraging existing lists and by conducting research of potential stakeholders that may be interested in one or all of the following categories: municipal users and groundwater users including private pumpers, community/neighborhood, agricultural, environmental, industrial, institutional, business, disadvantaged communities, state lands and agencies, and integrated water management. Members of the public also can sign up for the listserve via the SMGWA website.

Audience/Stakeholder Contact Strategies

Groundwater Users in the Basin

- **Scotts Valley Water District customers (all)**
How to contact: Email newsletters, bill inserts, newspaper advertising, social media, presentations to board of directors, community events
- **San Lorenzo Valley Water District customers (all)**
How to contact: Email newsletters, bill inserts, newspaper advertising, social media, presentations to board of directors, community events
- **Mount Hermon Association, private well residential users, and small water systems (all)**
How to contact: Newspaper advertising, social media, community events, postcard mailing, agency-led well owner meetings
- **Non-profit organizations and government agencies**
Email newsletters, newspaper advertising, social media, presentations, direct outreach to key staff



Key Messages and Talking Points

The C&E Plan is intended to be transparent and direct about how the GSP will impact stakeholders. Key messages and talking points include:

- SMGWA represents the groundwater interests of all beneficial uses and users of the basin equitably and transparently to ensure that the Basin achieves and maintains sustainable groundwater conditions.
- SMGWA is working to sustainably manage local groundwater to meet all users' needs without harming the environment or jeopardizing future water supply reliability.
- SMGWA is committed to working with stakeholders using an open and transparent communication and engagement process.
- As the overall GSP will be more comprehensive with an engaged group of stakeholders providing useful information, SMGWA will create substantial opportunities to educate stakeholders on basin conditions and the GSP process to facilitate soliciting their feedback on GSP development.
- As updating and implementing the GSP will be most successful with an engaged community, outreach will be ongoing past the GSP submittal date.

These messages are being used as the basis for specific talking points/Q&A/FAQ documents to support effective engagement with audiences. The SMGWA Guiding Principles also are used to support communication with audiences (see Appendix).

Strategies for Engagement

The SMGWA utilizes a variety of tactics to achieve broad, enduring and productive involvement with stakeholders during the development of the GSP. Below are activities that SMGWA uses to engage the public:

- Develop and maintain a list of interested parties
- Public informational sessions
 - » "Understanding Our Water" three-part education series
 - » "Undesirable Results – the SGMA Road to What Should be Avoided" workshop
 - » "State of Surface Water in the Santa Margarita Basin" workshop
 - » "The Path to Groundwater Sustainability: Goals and Challenges" discussion
 - » Virtual PWO meeting hosted on Zoom and broadcast live on Facebook
- SMGB tours
- Interviews conducted by Sacramento State, Consensus and Collaboration Program (as a third-party neutral facilitator to SMGWA)

Our Water:

One of the most precious commodities on earth—clean water—is something we tend to take for granted. But do you know what goes into ensuring that clean water comes out of your tap every time you turn it on? Planning, preparation and the cooperation of the community keep the water flowing. This is particularly important when climate change is making California's water future uncertain.



The San Luis Reservoir stores water that has traveled south from the Sacramento-San Joaquin Delta.

Sourcing and Buying



Calero Reservoir is one of 10 reservoirs operated by Valley Water in Santa Clara County.

Treating and Distributing



Senior Water Distribution Worker Manuel Hernandez checks water pressure and chlorine levels at the City's pump stations.

About half of Sunnyvale's water starts its journey in Lake Oroville and Lake Shasta, hundreds of miles away.

It flows through the Sacramento-San Joaquin Delta to the Santa Clara Valley Water District (Valley Water) for treatment. From there, it gets delivered to Sunnyvale's water system. The rest of our water flows down the Tuolumne River and into Hetch Hetchy Reservoir. The San Francisco Public Utilities Commission (SFPUC) treats that water before it comes to Sunnyvale.

Before we can get any of that water, we pay for it. Like most of the Bay Area, Sunnyvale buys water because there is not enough local

rainfall to meet all the city's needs. When planning how much to buy, we consider existing water demand and any projected development.

But purchasing water isn't cheap. In fact, it costs Sunnyvale 60% of the revenues we get from selling water to our customers. The rest of our revenue goes toward testing, and infrastructure construction, maintenance and repair. Statewide challenges also are driving up the cost of water. These include drought, climate change, wildfires and environmental demands.

Once we have the water, we make sure it's clean—one of the most important jobs we do.

Sunnyvale's drinking water meets or exceeds all federal and state drinking water standards. Valley Water and SFPUC treat most of our water, but we also monitor and test our water quality. We send monthly water quality reports to state and federal agencies.

Then it's time to send water to homes and businesses throughout the city. This uses our extensive network of infrastructure that most people never see. Our network includes four water plants that pump the water into 340 miles of pipe. A state-of-the-art system monitors and controls the flow and pressure of

water. We have set it up so that if the power goes out, the water doesn't.

We also hold millions of gallons of water in reserve in water tanks to meet emergencies like fighting fires. If we need to supplement our water supply during droughts, infrastructure failures or other water shortages, we have wells that tap into groundwater. We currently have very little need to pump from our wells. However, they could supply nearly half of our daily water demand if necessary. We sample the water and check the wells every week to make sure they are ready to go if we need them.



Recycled water represents 3% of the City's total water supply. We have been producing recycled water since 1993. We currently deliver it to 120 customers for non-potable uses such as cooling towers and irrigation.

Water Use: Then, Now & Beyond

Water use in Sunnyvale has decreased even as the population has increased. Though our population increased 40% since 1985, water use has dropped

by more than half. And projections for 2040 show the average number of gallons each person uses per day staying about the same even though our population will grow by 25%. What has contributed to reduced water use? High tech and research and development offices have replaced

Keeping Up the Flow

A Drop in the Bucket

Your Price for Water Compared to Other Liquids (average price per gallon)

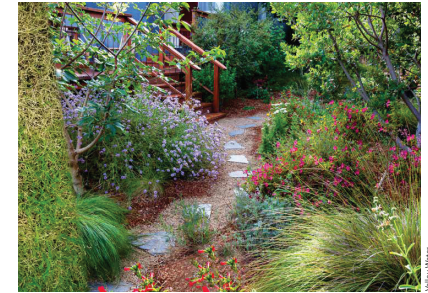


Planning and Maintaining



Maintaining the City's infrastructure includes repairing or replacing water mains due to age or condition.

Using and Conserving



Sustainable landscapes adapt to our rainfall patterns and can thrive with minimal watering.

We must plan for and invest in our water system if it is to remain reliable and meet our water needs.

Sunnyvale's state-mandated Urban Water Management Plan details the plans for our water future every five years.

The City Council adopted the last Urban Water Management Plan in 2016. The Council will consider the updated version this summer. The plan helps the City determine its water needs and how it will meet them. It looks at a variety of factors that will influence the water situation, including:

- The reliability of water sources over the next 20 years, in both normal and dry years.
- The demand for water, based on population and other influences.
- Use of recycled water, conservation, and plans in the case of water shortages.

The plan has helped the City determine how to deal with aging infrastructure. Sunnyvale has set aside \$85 million over the next 20 years to replace water lines. Maintaining and improving old facilities will help ensure a reliable supply of water.

We have already upgraded two water plants and have \$7.5 million to improve pump stations over the next two years. We have \$4 million set aside next year to rehabilitate water tanks. In a state prone to drought, having this plan helps the City weather water challenges.

Sunnyvale's residents and businesses have made conservation a way of life.

We can see the impact of this lifestyle change over time. In 1985, the City of Sunnyvale used 53% more water than we do today, even though we had far fewer people then.

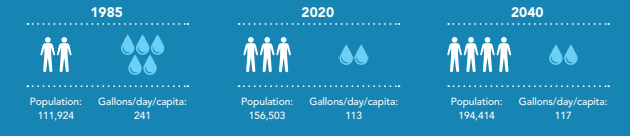
This year, additional conservation efforts will be necessary until water conditions improve. The SFPUC and Valley Water have both called for Bay Area customers to reduce their water use beyond current restrictions. There is a good reason for these requests. We live in a dry climate, making it harder to know what our water future holds. And when we begin to see consecutive years of below-normal snowpack and rainfall, we must dip into our water reserves. The snowpack, which melts and becomes water for the state, is 60% below the median as of late May. Water levels in Lake Shasta and Lake Oroville are

at 53% and 47% of their historical averages. The entire state is now in varying degrees of drought, according to the U.S. Drought Monitor. By comparison, only 2% of the state was in a drought in October 2019.

Doing your part to conserve now will help preserve our water supply and reduce the impact of droughts. Simple steps like fixing leaks, turning off the water while brushing your teeth, and reducing the days you water your landscape will help meet conservation goals.

Learn more about other water saving tips, tools and rebates at Sunnyvale.ca.gov, search: Water Conservation.

water-intensive industries, like canneries and semiconductor manufacturing. Revised building codes set new standards for sustainability and require water and energy efficiency. And water conservation has become a way of life in our drought-prone state.



Proposed Total Professional Fee & Fee Schedule

Prepared by Miller Maxfield, Inc.

Strategic Communications & Public Affairs
133 Mission Street, Suite 101
Santa Cruz, CA 95060
(831) 227-6469



Miller Maxfield, Inc.
Strategic Communications
& Public Affairs

Our Rates

- Principal - \$175/hr
- Account Manager - \$150/hr
- Technical Writer - \$150/hr
- Designer - \$125/hr

ONGOING: AGENCY CONSULTING AND SUPPORT	Timing	Subtasks/Deliverables	Hour Per Task - Principal	Cost Per Task - Principal	Hours Per Task - Account Mgmt	Cost Per Task - Account Mgmt	Hours Per Task - Graphic Design	Cost Per Task - Graphic Design	Total Hours Per Task	Total Cost Per Task
Marketing outreach audit	Aug 2022- Sept 2022	Review current outreach efforts, materials and messaging; provide report of findings and recommendations	2	\$350.00	2	\$300.00	0	\$-	4	\$650.00
Strategic planning, counsel & messaging	Aug 2022- July 2023	Kickoff meeting for goal and messaging alignment; Ongoing strategic counsel; messaging revisions	12	\$2,100.00	12	\$1,800.00	0	\$-	24	\$3,900.00
Community workshops & events	Oct 2022- Feb 2023	Planning, promotion and on-site support for community events/workshops hosted by SLVWD (estimate 3 events during 12-month period)	10	\$1,750.00	60	\$9,000.00	10	\$1,250.00	80	\$12,000.00
Social media	Sept 2022- July 23	Content development and execution; monthly content calendars, photos and graphics	8	\$1,400.00	25	\$3,750.00	10	\$1,250.00	43	\$6,400.00
Outreach materials	Sept 2022- July 2023	Graphic design services in support of events, workshops, eNews, website and collateral (postcards, doorhangers, signage), events and other outreach materials as needed	6	\$1,050.00	15	\$2,250.00	40	\$5,000.00	61	\$8,300.00
e-Newsletters	Oct 2022- July 2023	Content, layout and execution support for newsletters and other eblasts	5	\$875.00	22	\$3,300.00	8	\$1,000.00	35	\$5,175.00
Media relations	Sept 2022- July 2023	Writing/editing of fact sheets, FAQs, etc.; writing and distribution of press releases; media outreach strategy and support; plan, promote and coordinate media events	12	\$2,100.00	40	\$6,000.00	0	\$-	52	\$8,100.00
Project Management	Aug 2022- July 2023	Monthly written progress reports; attend meetings monthly; regular communications as needed	20	\$3,500.00	48	\$7,200.00	0	\$-	68	\$10,700.00
		Hours	75		224		68		367	
		Hourly Rate		\$175.00		\$150.00		\$125.00		
		Cost		\$13,125.00		\$33,600.00		\$8,500.00		\$55,225.00

ON-CALL:	Proposed Timing	Subtasks/Deliverables	Hour Per Task - Principal	Cost Per Task - Principal	Hours Per Task - Account Mgmt	Cost Per Task - Account Mgmt	Hours Per Task - Graphic Design	Cost Per Task - Graphic Design	Total Hours Per Task	Total Cost Per Task
Technical Writing	Oct 2022- Feb 2023	Review of technical source documents; writing and editing; design and layout of documents	8	\$1,400.00	22	\$3,300.00	6	\$750.00	36	\$5,450.00
ADDITIONAL RECOMMENDED ACTIVITIES	Proposed Timing	Subtasks/Deliverables	Hour Per Task - Principal	Cost Per Task - Principal	Hours Per Task - Account Mgmt	Cost Per Task - Account Mgmt	Hours Per Task - Graphic Design	Cost Per Task - Graphic Design	Total Hours Per Task	Total Cost Per Task
Video	Oct 2022- Feb 2023	Concept and script development in collaboration with video production partner; graphic design/art direction including branding; project management for 2-3 videos of varying length (15 seconds to 3 minutes) for use on website and social media	8	\$1,400.00	25	\$3,750.00	4	\$500.00	37	\$5,650.00
Third-party Cost		Video production		\$7,500						\$7,500
Advertising	Oct 2022- Feb 2023	To support maximum participation in community workshops/events, ad placements with SLV local media SLV Post, Press Banner, Mountain Bulletin KBCZ, and Facebook (promoted posts). Create advertising plan and budget; design ads and coordinate submissions	4	\$700.00	10	\$1,500.00	8	\$1,000.00	22	\$3,200.00
Third-party Cost		Ad buys/insertions with media outlets								\$5,000
Fleet messaging	Oct 2022- Feb 2023	Develop messaging and graphics to be installed on fleet vehicles (example: drought/conservation)	4	\$700.00	4	\$600.00	10	\$1,250.00	18	\$2,550.00
Third-party Cost		Branding production and installation								\$2,000.00

MEMO

TO: Administrative Committee
From: District Manager
SUBJECT: Strategic Plan
DATE: July 12, 2020

Recommendation:

It is recommended that the Administration Committee review the attached information regarding updating the District's Strategic Plan and make a recommendation for updating the District's Strategic Plan.

Background:

The District's current Strategic Plan dated December 2016 can't be verified as ever being adopted by the Board. In 2019 the Board of Directors discussed updating the existing plan. A great deal of discussion has taken place in drafting an updated Plan.

In September 2019, Director Fultz submitted a draft plan to the Board for review. After discussion, it was decided that Directors Fultz and Farris would edit the draft.

In June 2020, the Board directed the District manager to review the Fultz/Farris draft and return with a modified document to reflect the Manager's goals and objectives.

COVID, changes in Board members, and the CZU Fire put the Strategic Plan on hold. Only one Board Member, Director Fultz, is still on the Board that worked on the draft document and is familiar with the past process.

At this point, the staff is recommending we jump-start the discussion and give direction to staff on moving forward with a draft Strategic Plan.

Attachment

San Lorenzo Valley Water District

2019 – 202x Strategic Plan

Approved xx/xx/2019

Mission Statement

The primary mission of the San Lorenzo Valley Water District is to provide our customers with reliable, safe, high quality water at the lowest possible sustainable price.

To support this primary mission, the District must:

- improve the District's fiscal vitality and infrastructure integrity, for current and future generations;
- maintain a robust water supply to meet current customer and future demographic demands, in addition to adequate flows to support fire suppression;
- provide outstanding service and community relations; and
- protect the environmental health of the land and aquifer upon which the District's water sources depend and facilities reside.

1.0 Introduction

What is a Strategic Plan?

A Strategic Plan is a broad-vision, top-level policy document for the District to set clear direction for all aspects of its mission. It serves as a framework under which tactical and operational decisions are made by District staff and approved by the Board over a multi-year period. It is a concise and disciplined effort to articulate the Board’s vision for the District.

Each year the Board of Directors will review the Strategic Plan. Concurrently, the Board will review the District’s staff tactical and operational plans every quarter.

The District is committed to prioritizing, planning and implementing Strategic Plan projects in an inclusive and transparent manner. We welcome and encourage input from the entire San Lorenzo Valley Water District community.

Assessment of SLVWD’s Strengths, Weakness, Opportunities and Threats (SWOT)

The table below provides a summary of our District assessment.

<p>Strengths</p> <ul style="list-style-type: none"> • Community • Staff • Water Sources Diversity • Water Practices and Conservation • History 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Money • Customer Density (relative to other Districts) • Historical lack of investment in infrastructure • District Size (# customers relative to other Districts) • Geography • Reserves
<p>Opportunities</p> <ul style="list-style-type: none"> • Water Sources • Water Distribution • Technology • Leveraging Assets • Operational Efficiencies • Growth (selected) • Bulk/wholesale water sales 	<p>Threats</p> <ul style="list-style-type: none"> • Natural and human-caused disasters • Regional Water Planning • Felton Permit Overdraft • Increased Regulation (relative to value of regulation) • State drive to consolidate districts

A strategic plan is also intended to help leverage our strengths, find creative ways to minimize the impact of our weaknesses, pursue opportunities and either avoid or prepare for threats.

1.0 Introduction

Strategic Plan Theme: Focus

The District assessment shows a full range of important topics for the SLVWD to address over the next five years, and beyond. The Board believes a district strategic plan must have one overarching theme: **Focus**. Without it, the District could stray from our primary mission.

To the SLVWD Board, management and staff, **Focus** provides a set of guidelines to use when making decisions about how to:

- spend money—and save money
- decide which tasks merit investment of staff and Board time
- allocate resources to implement day-to-day tasks
- measure the effectiveness of the resources allocated in a clear and transparent fashion (operational metrics)
- recalibrate as needed based on outcomes and variances from desired results
- determine the scope of activities and other pursuits for District involvement

San Lorenzo Valley Water district is a small district, with approximately 8,000 customers spread out over about 60 square miles and served by close to 170 miles of pipeline and 38 storage tanks. To be successful, our District must **Focus** on the activities necessary to deliver on its core mission—ensuring that water is there when we open the tap in our homes, today and for decades to come. To overcome our small size, low-density and limited resources, our District must be “ruthlessly efficient”, working as hard as possible to bend our operating cost curve downwards to ensure as much of our ratepayers’ money as possible can go towards urgently needed infrastructure improvements.

There are several key areas the District must address to support our **Focus**, as outlined in this Strategic Plan.

- Finances
- Infrastructure, including fire suppression resources
- Operations
- Water Stewardship
- Civic Engagement
- Organization and Staffing

With one additional special topic: Bear Creek Estates Wastewater.

1.0 Introduction

Long Term Vision

The San Lorenzo Valley Water District is now in its eighth decade of service to our local community, which stretches from almost Highway 17 in Scotts Valley through Zayante, Lompico, Felton, Ben Lomond, Brookdale, Boulder Creek and all the way to north of Boulder Creek. While the District's service area boundaries have expanded over the years, its founding principles have not changed. The SLVWD represents the essence of local government: an agency that is governed by its local community through its locally elected Board of Directors. The District reaffirms its commitment to maintaining this local focus and control for generations to come.

While this document focuses on the next five years, the vision guiding our plans must stretch out towards a more distant horizon, one that encompasses the timeline for future generations.

There are four long-term trends that may affect the District during the next two decades:

1. **Growth.** The SLVWD community is a no-growth area with limited opportunities for additional housing. However, portions of our District in Scotts Valley could see significant growth, based on that city's current pro-growth cycle. New septic technologies may enable limited in-fill growth in select areas of the SLVWD community. Finally, while the number of dwelling units in the SLVWD may not grow substantially, the number of people per dwelling unit may possibly grow, resulting in an overall population increase as more young families move to our community to take advantage of our unique way of life (which is only 35 miles from the center of the most dynamic economic engine the world has ever seen—Silicon Valley). Historically, the SLVWD population was about 30% higher just two decades ago when we had more and younger families. More people per housing unit means more water required to serve that population.
2. **Drought.** While drought—even severe drought—has come and gone throughout the decades, climate forecasts now predict droughts may be longer and more severe. Those same forecasts predict that we will receive the same average rainfall, but it may also be in shorter, more intense events. We recently experienced the worst drought our area has seen in the past three decades. During this drought, and combined with the increase in water rates, the SLVWD residential customers substantially reduced indoor and outdoor water use, more than 30% overall, down to an average of under 60 gallons per day from July 2016 to June 2017 (assuming an average of about 2.6 residents per SLVWD residential customer). While indoor and outdoor usage has crept up a little since then, to an average of just over 60 gallons per day, it will be a major challenge for most District customers to reduce another 30% to 42 gallons per day, during the next drought. While our customers have shown that they are prepared to conserve as much as possible when needed, a prudent and rational plan must also include expanding our water supply sources and, if feasible, storage, to provide more of a buffer against the droughts that will come our way. It's also important to note that the average rainfall over the last 39 years, as measured by the District, is the same as the average rainfall measured by the District for the last 10 years—49.16 inches.

1.0 Introduction

3. **Natural disasters.** Earthquakes, severe and concentrated rainfall, mudslides, and wildfire are a constant threat to our community. Over the past several decades, we have been hit with disasters, including recent disasters—severe concentrated rainfall (2017) which led to substantial damage to District facilities and wildfire (2017 and 2018), which were quickly suppressed. We hope for a calm future but we must plan for the worst. When disaster strikes the District and the community must be prepared to work together to do whatever is necessary to keep the water flowing.
4. **Infrastructure and deferred maintenance.** Many elements of our water system are well beyond their design lives. Replacing old and failing infrastructure has not been a funding priority for the District in the past. We have a responsibility to modernize our system so that when we pass it on, the next generation doesn't have to pay more than its fair share.

The Board's strategic goals

The current board has committed to **bending the operating cost curve down** while fundamentally **changing our District's spending patterns** so that every dollar that isn't essential and necessary to deliver water or needed to meet regulatory requirements will be **channeled into infrastructure**. To provide our community with a clear picture of the state of our infrastructure, our top priority is the completion of a **Water Master Plan**, a comprehensive inventory of our system, including design life and how much of that design life is left as well as the cost to modernize our infrastructure for future generations.

Modernizing our infrastructure will cost money. The District is behind schedule in that effort and so to bring the infrastructure up to date we are committed to **operating efficiently** (through use of technology) and being as cost-effective as possible through **operational measurements** which will be made available to our community. To that goal we intend to be completely and **maximally transparent** about operating costs, liabilities (funded and unfunded), and the state of our infrastructure and the costs associated with modernizing. We intend to **look for every creative financing source** and improvement method possible in order to keep the direct costs to our local community as low as possible. We are **committed to supporting staff** in finding ways to **bring construction and operating costs down**, working cooperatively with neighboring water districts to **enter into win-win arrangements** and by working with our state and federal legislators for **regulatory relief** to small districts like ours without compromising the quality of the water delivered to our taps.

This is a living strategic plan, and we welcome and encourage the participation of our staff and the public in finding creative ways to meet District objectives and **sustainability**.

2.0 Finances

Overview

Fiscal oversight is the Board's #1 job. Spending money wisely is the District's #1 job.

Goals

To that end, the Board establishes seven financial strategic goals:

1. Reduce the growth rate of operating expenses. Our District must look for ways to bend the operating expense curve downwards through strategic focus, more efficient operations and tight cost control, including leveraging technology for operations and customer service (e.g., customer and field service software integrated with the District's communications systems) that shows a positive Return on Investment (ROI) and provides the District with more visibility into how to improve operational efficiencies. To support this goal, financial and operating costs (metrics) will be established to show our customers that money is being spent well and wisely.
2. Over a period of 5–7 years, fund the District's operational and infrastructure reserve funds to sustainable levels as set forth in the District's reserve policy and, once there, maintain those levels. The District will also establish reserve goals for other unfunded liabilities including, but not limited to, unfunded pensions (about \$3.7 million), post-retirement benefits (about \$1.0 million), accrued employee vacation pay (currently over \$500,000), deferred maintenance (currently being calculated) and deferred meter replacement (currently being calculated) as soon as those costs are known.
3. Direct all funds not otherwise needed for reserve funds and operating expenses towards regular, recurring, methodical and incremental infrastructure improvements with a goal of spending between 2% - 2.5% of the replacement cost of our system, once calculated, every year (adjusted for inflation). An example of this approach is a seasonal "pipe crew" to replace leaky pipes; the number of leaks in our aging system drive up our District's operational costs and diverts our field operations staff from other needed activities.
4. Use the District's website to post easy to understand reports and graphics for key performance metrics (e.g., "Top 10"), updated periodically to reflect changes and progress.
5. Achieve and sustain financial reporting awards from independent organizations, which this Board views as a floor, not a ceiling, for the level of financial transparency needed by this District. The District will examine and update its financial reporting schedule and information provided to the Board and public to reflect the key performance metrics.
6. The District will ask for support from the community to change bill payment methods to move away from expensive options like credit cards, to efficient methods like direct pay.
7. Move to multi-year budgets as soon as possible, i.e.: three years detail; 5 years total, and accelerating completion of the fiscal year-end annual report, to improve timeliness and a better ability to monitor results and change course if necessary.

Supplemental Financing

In addition to searching for new revenue sources, District staff will also investigate grants and state funds (e.g., Prop 1). Supplemental resources leverage District resources, and thus protects the District from even greater rate increases. The District will determine proper funding and assistance necessary to support an organized effort to seek out and secure these funds.

3.0 Infrastructure

Overview

This section focuses on new and replacement infrastructure; not maintaining the infrastructure the District already has in place. That will be covered in the next section (Operations).

Historically, infrastructure replacement has been given a lower funding priority. In addition, this Board finds that the SLVWD community has not had sufficient information regarding the state of the District's infrastructure and, more importantly, the cost of replacing that infrastructure over time. This Board will ensure that information is available.

Goals

To that end, the Board establishes nine Infrastructure strategic goals:

1. As rapidly as possible, develop a comprehensive inventory of the District's infrastructure populated with information as determined by the engineering staff and engineering committee (the metadata), with a particular emphasis on fire suppression facilities. This information will vary by infrastructure type (e.g., tanks, pipe, pumps, treatment plant, etc.). However, at a minimum, the inventory will identify the specific inventory item, its age, its design life, its estimated replacement cost in current dollars, its general condition (from the Field Operations staff), customers served, above/below ground, etc.
2. Invest at least 2% - 2.5% per year in infrastructure replacement based on the inventory and to do the engineering work necessary to prepare the projects for construction¹.
3. Working with the Field Operations team, geocode all field activities and repairs, and include other metadata that could be useful for infrastructure improvement decisions (e.g., size of leak, customers served, etc.)
4. Staff the engineering team so as to be able to perform a substantial portion of work in-house, using consultants for only specialized tasks and functions.
5. To support the Board's policy of directing as much of our resources as possible to infrastructure replacement, engineering department tasks which would otherwise drain engineering resources must be minimized or otherwise funded to be self-supporting.
6. All new projects will be assessed for improvements to fire suppression capabilities. For example, to improve fire suppression in residential neighborhoods, the District needs to upgrade its 2-, 3- and 4- inch pipe (about 50% of our installed base of pipe and a majority of our residential service lines) to a minimum of 6 inches, or as determined by design.
7. To support a "catch-up" program to counteract decades of infrastructure neglect, the District will increase its debt while ensuring a conservative debt coverage ratio as determined by District revenues.
8. Review the District's current storage tank and pressure zone design guidelines.
9. Complete the Lompico projects (identified in the merger agreement) as soon as possible.

¹ To keep up with replacement requirements, if we assume a current replacement cost of the District's infrastructure at \$150 million with an average design life of 50 years, this means that the District must spend \$3 million a year on replacing water infrastructure. This does not include "catch-up" funding needed due to deferred improvements.

4.0 Operations

Overview

The focus for this section is on maintaining the infrastructure the District already has in place.

Historically, infrastructure maintenance has had a lower priority. In fact, the 2016 Staffing Study stated:

"16. The District is currently not able to maintain an active preventative or predictive maintenance program for most aspects of its physical infrastructure. Based on interviews with operations and maintenance staff, the majority of all work is reactionary. This practice is not sustainable and may ultimately lead to larger catastrophic failure of critical systems impacting public health and safety."

This was a major reason for employee additions made in 2016 and 2017 in the Operations department.

Goals

To that end, the Board establishes five Operations strategic goals:

1. Sustain the ongoing effort to shift the emphasis of the Field Operations team to a proactive focus. To that end, establish and publish, as soon as possible, an ongoing maintenance program and schedule, including items for which maintenance has been deferred. The scope of the initial publication should be at least 15 years into the future with an ultimate goal of through the end of each asset's design life. Once established, execute that maintenance program.
2. Establish an ongoing meter replacement program, based on the meter's design life, along with an examination of the best way to implement that program given the impact of operational costs where most meters are read automatically. A key input into this program is an assessment of using meters past their design life.
3. Establish performance metrics for the Operations department that will augment and/or replace the current metrics in the Operations department monthly reports.
4. Execute a leak detection program at least every 3 years and more often if leak reports (meaning water produced minus water sold minus other internal uses) indicate a need to do so. For example, this will be the subject of one of the performance metric reports. Fixing leaks is important because it's one of the best tools, under District control, to conserve water and augment support for the re-introduction of coho and steelhead into the San Lorenzo river watershed.
5. Continue to monitor, and update as necessary, the laboratory and equipment requirements for water testing as mandated by other governmental agencies and continue the assessment about which tests should be done using SLVWD resources and which tests should be done by external companies, maximizing cost savings.

5.0 Water Stewardship

Background and Current State Policy

In order to ensure an abundance of water for future generations, particularly in light of California's periodic droughts, and given the technology available at that time, our ancestors built storage infrastructure like dams and reservoirs around the state. In Santa Cruz County, the Newell Creek Dam/Loch Lomond Reservoir (owned by the City of Santa Cruz), is the only example of this approach. Due to environmental and regulatory requirements, that approach is no longer possible. Instead, California's current approach appears to be:

1. With a "one size fits all" approach that doesn't take into account regional geography, water sources or climate conditions, requires persons living in California to use no more than 55 gallons of water per day (indoor use) declining to 50 gallons per day by 2030. By contrast, estimates from various groups indicate national average indoor water use per day of 60 – 80 gallons. (The District is in compliance with this requirement.)
2. Focus on replenishing groundwater resources so groundwater reservoirs can act as a substitute for above-ground reservoirs to help during drought years. One possible approach under consideration is to do this via "injection" wells where treated water generated during wet periods is forced, under pressure, back into the underground aquifers. Over time this builds up the groundwater reserves, which can be used during drought years. Treated water injected into the aquifer and later extracted must be treated again. (The District has not yet taken a position on this approach.)

Overview

The SLVWD is unique in two ways among Santa Cruz County water districts:

1. Our District generates about 50% of its water from surface sources and 50% from groundwater sources. Other districts are either all or mostly surface or ground—but not both.
2. About 50% of the water the District produces (and which customers use) already goes back into the aquifer via septic and leach fields.

In addition, the District recently concluded a multi-year, \$800,000+ watershed study which clearly demonstrated that the SLVWD's use of water does not have a measureable environmental impact on either water flow or temperature required for fish—meaning that our District is sustainably supporting the re-introduction of coho and steelhead into our watershed.

Finally, the SLVWD's sale of water is down 20% from 10 years ago (30% from five years ago), and the number of dwelling units inside the District's boundaries has only minimally increased in the last 10 years.

Therefore, these facts, combined with the fact that the District is already at or near the California water usage goals, means that the SLVWD is already supporting sustainability.

5.0 Water Stewardship

Goals

To that end, the Board establishes twelve water stewardship strategic goals:

1. As rapidly as possible, move to managing water resources in the SLVWD as a unified whole rather than as a collection of independent and separately managed resources.
2. Re-establish the use of Loch Lomond water, suspended in the late 1970s, to deliver about 14% of the District's current water consumption, either by treating raw water or purchasing treated water.
3. Resolve the status of the District's Fall Creek permit² as quickly as possible.
4. As available, acquire property, assets or infrastructure with water source potential and/or develop already owned—but unused—water sources.
5. Dispose of surplus and non-strategic property not directly involved in water generation or hosting water generation sources, storage, transport or offsets, and that have no potential to do so—with a goal of transferring selected properties to other entities whose primary focus (and funding) is environmental and habitat remediation and preservation.
6. In light of our District's demographic realities and historically good environmental stewardship, work with federal and state agencies to minimize and reduce the regulatory costs imposed on the District in order to direct as much money as possible to desperately needed infrastructure improvements.
7. Continue to cooperate with federal, state and local agencies and groups to find new ways to continue the current fish monitoring study, recognizing that a significant and fast way to increase water flow for fish is to replace aging and leaky infrastructure.
8. Upgrade and modernize the following reports as quickly as possible: Watershed Management Plan, Urban Water Management Plan, Integrated Pest Management Plan and complete the Blue Ribbon Commission report on broom control options compatible with existing District policy banning glyphosate.
9. Drive the District's participation in the Santa Margarita Groundwater Agency to a conclusion that represents the best interests of the District and its customers.
10. Maintain the District's current operational practices to minimize its output of greenhouse gases in an economically viable and responsible fashion, including energy efficiency, fuel efficiency, use of renewable energy generation (solar) and carbon sequestration made possible through the District's ownership of, or involvement with, resource lands.
11. Maintain water conservation awareness and education through information on the District's new website and ramp up activities as needed during drought years.
12. Update District policies to state that, going forward, the District will not accept ownership of, or responsibility for, any third-party project that has unfunded maintenance requirements, unless those maintenance requirements are either minimal or funded, and unless appropriate indemnification is in place.

² For a variable number of days each year (e.g., in CY2018, 57 days), depending on rainfall, the District, like all water entities before it, operates its Felton system in violation of a state permit. The District must do this to keep Felton residents supplied with water since other state regulatory requirements currently prohibit the importation of water into Felton from other parts of the District. With the City of Santa Cruz perfecting its water rights to the San Lorenzo River, this appears to be a great opportunity to address this issue since those two permits are related.

6.0 Civic Engagement

Overview

The Board believes that good civic engagement is the result of maximum transparency, which the Board defines as going well beyond the bare minimum requirements mandated by California law (i.e., Brown Act) or recommended by other groups like the Special District Leadership Foundation (SDLF) or the Government Finance Officers Association (GFOA).

Goals

To that end, the Board establishes seven Civic Engagement strategic goals:

1. Implement a new website, compliant with new California state regulations for public agencies, as soon as possible. The new website must retain the richness of documentation currently provided to the public while having a more modern and easier to navigate look-and-feel. It must also create new areas for each SLVWD department or initiative (e.g., (i) infrastructure construction and (ii) key financial information, with an emphasis on graphics). The website must also have a place for a District video library, which will include not only Board meeting videos but also videos showing District operations and people as well as selected and curated information from third-parties. And finally, the website must support the District's intention to aggressively migrate to lower-cost means of invoicing, receiving invoices and payment.
2. Emphasize electronic communication and engagement. Social media, especially when combined with more outreach to neighborhood groups, is lower cost and has greater reach than printed brochures, separate mailers and most other hardcopy information. Electronic outreach must provide opportunities for all SLVWD departments. Printed material may be used in conjunction with paper bills (e.g., a 6 month newsletter regarding District activities) and should be designed to reinforce overall District messaging.
3. Assign Board members to work with civic organizations and maintain community interaction via tabling, community chats, participation in community events (e.g., Felton Farmer's Market), outreach to civic groups and other agencies in our community and other meetings designed to promote visibility within the community.
4. Conduct periodic customer surveys about selected topics using web-based applications or cloud subscription (SaaS) services.
5. Implement the 2018 Grand Jury recommendations for outreach and training.
6. Using community resources and the Administration committee, develop a Communications Plan to implement these goals.
7. Introduce the use of new technologies (e.g., conference calling, live-streaming, etc.) to committees and Board meetings as soon as possible.

In addition, the District will continue its efforts to collect e-mail addresses to facilitate swift and low-cost communication with customers. In order to ramp up its efforts in social media and the new website, the Board may acquire professional assistance in this area.

7.0 Organization and Staffing

Overview

As identified in the District assessment (page 2), our District staff is one of our key strengths, and the District could not exist without its dedicated staff. Each water district in the state has its own unique challenges—but we believe that the SLVWD is unique in so many areas—and it is a testament to our staff’s dedication that water flows to our taps every day even with those challenges.

Goals

To that end, the Board establishes six Organization and Staffing strategic goals:

1. Continue to offer District staff a competitive compensation package commensurate with District size and community resources, recognizing that the SLVWD cannot compete with the far larger and wealthier cities “over the hill”, while simultaneously offering a unique work environment and quality of life not available in suburban environments elsewhere. The District will monitor compensation levels through publicly available resources (e.g., Transparent California)—and will maintain current information on them.
2. Resolve the issue of facilities in a manner that leverages existing assets, emerging technologies and workforce flexibility dynamics, while recognizing asset location vulnerability during disasters, in a fiscally responsible fashion. The Board reaffirms its opposition to the “campus project” (2014) and the more recent facilities plan (2017).
3. The Board recognizes that the field operations and administrative staff are the people that know best what is needed to do their jobs. The Board is committed to providing the training, tools and technology the District staff needs to do their jobs better, faster and with greater quality—demonstrating acceptable Return on Investment (ROI)—which is needed to fulfill the District’s mission.
4. The Board commits the District to leverage “cloud” applications, to the greatest extent possible, and to minimize its paper-based footprint as much as possible while providing more and better tools to the District staff. This includes mandating electronic generation at the point of document creation while retaining searchability. The District also commits to incorporating geographical-based information (GIS) technology in all of its activities to ensure quantitative decision-making in the future.
5. Recognizing that consultants and other temporary assistance plays a vital role in augmenting staff, particularly at a small district like SLVWD, the District will establish policies that balance speed, workload, skills, cost and transparency in the acquisition process.
6. Starting in FY2019-2020, conduct a staffing review every other year to ensure that staffing levels are optimized for District needs, priorities, funding and community resources, especially as more infrastructure projects get underway.

8.o Bear Creek Estates Wastewater Facilities

Objective

The District will manage the Bear Creek Estates wastewater operation until a successful transition to a more appropriate solution is found and implemented, at which time the SLVWD will exit this line of business. The Bear Creek Estates residents have been more than patient. With the current system at the end of (if not beyond) its design life, it is imperative that the existing system be replaced as soon as possible with a more modern system. Specifically, this means first doing an assessment of possible solutions—which are well-known—including feasibility of each solution for the specific Bear Creek Estates location as well as generating cost estimates. We will then work with our Bear Creek Estates wastewater customers to find an appropriate means of financing the project.

The Board affirms its commitment to getting the feasibility study done as soon as possible, regardless of budget year considerations.

The District has been attempting to find another agency to take over the operation of this facility for years. In light of the lack of interest on the part of Santa Cruz County, or any other agency, it is imperative that the District and the Bear Creek Estates residents face the reality that a takeover by another agency is not likely to happen and to prepare for a different future.

The Board directs District staff to work on financing options and models concurrent with the engineering study. The goal is that when the final numbers come back for each feasible option, those numbers can be plugged into an already built model showing the Bear Creek Estates residents the future cost for a system replacement. Time is of the essence—parallel work is required.

In addition, the Board asks District staff to vigorously seek and identify possible sources of grant or other funding which will reduce the impact to the residents for the replacement of the system. The Board asks District staff to reach out to other wastewater agencies and any other resources to see if they can assist in this effort.