



Tuesday, October 10, 2023 at 1:00 PM
Valley Sanitary District Board Room
45500 Van Buren Street, Indio, CA 92201

**BOARD OF DIRECTORS
REGULAR SESSION
AGENDA**

Valley Sanitary District is open to the public and board meetings will be conducted in person. In addition to attending in person, members of the public may view and participate in meeting via the following:

Zoom link: <https://us06web.zoom.us/j/84740883401>

Meeting ID: 847 4088 3401

To address the Board of Directors during the virtual live session via zoom, please email the Clerk of the Board at hgould@valley-sanitary.org or, alternatively, during the specific agenda item or general comment period (i.e. non-agenda items), please use the "raise your hand" function in zoom in order to be recognized by the Clerk of the Board in order to provide comments in real time.

The Clerk of the Board will facilitate to the extent possible any email requests to provide oral testimony that are sent during the live meeting. Members of the public may provide Oral testimony in person or during the virtual live session and are limited to three minutes each. To address the Board in person please complete speaker request card located at in the Board Room and give it to the Clerk of the Board.

If you are unable to provide comments during the meeting, written public comments on agenda or non-agenda items may be submitted by email to the Clerk of the Board at hgould@valley-sanitary.org. Written comments must be received by the Clerk of the Board no later than 11:00 a.m. on the day of the meeting.

1. CALL TO ORDER
2. ROLL CALL
3. PLEDGE OF ALLEGIANCE
4. PRESENTATION
 - *Charles Metcalf, College of the Desert Student - The Great Alumni Hunt*
5. OCTOBER EMPLOYEE ANNIVERSARIES

- *Holly Gould, Clerk of the Board - 14 years*

6. PUBLIC COMMENT

7. CONSENT CALENDAR

Consent calendar items are expected to be routine and noncontroversial, to be acted upon by the Board of Directors at one time, without discussion. If any Board member requests that an item be removed from the consent calendar, it will be removed so that it may be acted upon separately.

7.1 APPROVE THE MINUTES FOR THE BOARD OF DIRECTORS REGULAR MEETING HELD SEPTEMBER 26, 2023

Recommendation: Approve

7.2 APPROVE WARRANTS FOR OCTOBER 10, 2023

Recommendation: Approve

8. NON-HEARING ITEMS

8.1 AUTHORIZE THE GENERAL MANAGER TO APPROVE THE REBUILD OF INFLUENT PUMP #5

Recommendation: Approve

8.2 AUTHORIZE THE GENERAL MANAGER TO EXECUTE A ONE-YEAR CONTRACT FOR SOCIAL MEDIA AND PUBLIC RELATION SERVICES IN THE AMOUNT OF \$116,931

Recommendation: Approve

8.3 AUTHORIZE THE GENERAL MANAGER TO EXECUTE A ONE-YEAR CONTRACT FOR LANDSCAPE AND LAWN CARE SERVICES FOR AN AMOUNT NOT TO EXCEED \$19,896.36

Recommendation: Approve

8.4 AUTHORIZE THE GENERAL MANAGER TO EXECUTE A ONE-YEAR CONTRACT FOR JANITORIAL SERVICES FOR AN AMOUNT NOT TO EXCEED \$39,777.84

Recommendation: Approve

8.5 AUTHORIZE THE GENERAL MANAGER TO EXECUTE AMENDMENT #1 TO A PROFESSIONAL SERVICES AGREEMENT WITH SOFFA FOR THIRD PARTY REVIEW OF SCADA AND PLC PLANS AS PROVIDED BY THE SCHNEIDER ELECTRIC TEAM FOR THE RECYCLED WATER PROJECT - PHASE 1

Recommendation: Approve

8.6 AUTHORIZE SPECIFIC DIRECTORS TO ATTEND THE CSDA SPECIAL DISTRICT LEADERSHIP ACADEMY IN SONOMA, CALIFORNIA, AND REIMBURSE RELATED EXPENSES AND CANCEL THE BOARD MEETING OF OCTOBER 24, 2023

Recommendation: Approve

9. GENERAL MANAGER'S REPORT

9.1 RECEIVE MONTHLY GENERAL MANAGERS REPORT FOR SEPTEMBER 2023

Recommendation: Review

10. COMMITTEE REPORTS

10.1 [DRAFT MINUTES OF THE OPERATIONS COMMITTEE MEETING - OCTOBER 3, 2023](#)

Recommendation: Discuss

11. DIRECTOR'S ITEMS

12. INFORMATIONAL ITEMS

13. ADJOURNMENT

POSTED October 5, 2023
Holly Gould
Clerk of the Board
Valley Sanitary District

PUBLIC NOTICE

In compliance with the Americans with Disabilities Act, access to the Board Room and Public Restrooms has been made. If you need special assistance to participate in this meeting, please contact Valley Sanitary District (760) 235-5400. Notification 48 hours prior to the meeting will enable the District to make reasonable arrangements to ensure accessibility to this meeting (28 CFR 35.102-35.104 ADA TITLE II). All public records related to open session items contained on this Agenda are available upon request at the Administrative Office of Valley Sanitary District located at 45-500 Van Buren Street, Indio, CA 92201. Copies of public records are subject to fees and charges for reproduction.



ITEM 7.1
ACTION

Valley Sanitary District

DATE: October 10, 2023
TO: Board of Directors
FROM: Holly Gould, Clerk of the Board
SUBJECT: APPROVE THE MINUTES FOR THE BOARD OF DIRECTORS REGULAR MEETING HELD SEPTEMBER 26, 2023

Suggested Action

Approve

Strategic Plan Compliance

GOAL 6: Improve Planning, Administration and Governance

Fiscal Impact

None

Environmental Review

This does not qualify as a project for the purposes of CEQA.

Background

The meeting minutes for the Board of Directors Regular Meeting held September 26, 2023.

Recommendation

Approve

Attachments

[26 Sept 2023 Meeting Minutes.edited.docx](#)

**VALLEY SANITARY DISTRICT
MINUTES OF REGULAR BOARD MEETING**

September 26, 2023

A regular Board Meeting of the Governing Board of Valley Sanitary District (VSD) was held on Tuesday, September 26, 2023, at 45-500 Van Buren St., Indio, CA 92201.

1. CALL TO ORDER

President Canero called the meeting to order at 1:00 p.m.

2. ROLL CALL

Directors Present:

Jacky Barnum, Debra Canero, Mike Duran, Scott Sear, William Teague

Staff Present:

Jason Dafforn, General Manager; Jeanette Juarez, Chief Administrative Officer; Dave Commons, Chief Operating Officer; Ron Buchwald, District Engineer; Holly Gould, Clerk of the Board; and Craig Hayes, Best Best & Krieger

3. PLEDGE OF ALLEGIANCE

4. PUBLIC COMMENT - None

5. CONSENT CALENDAR

5.1 Approve the Minutes for the Board of Directors Regular Meeting held September 12, 2023

5.2 Approve Warrants for September 26, 2023

5.3 Receive and File Credit Card for August 31, 2023

5.4 Monthly Financial Report for the Period Ending August 31, 2023

ACTION TAKEN:

MOTION:

Vice President Duran motioned to approve the consent calendar as presented. Secretary/Treasurer Sear seconded the motion. Motion carried by the following roll call vote:

AYES: Barnum, Canero, Duran, Sear, Teague

NOES: None

MINUTE ORDER NO. 2023-3331

6. NON-HEARING ITEMS

- 6.1 Inform the Board of Directors that VSD Cannot Accept the Water Infrastructure Finance and Innovation Act (WIFIA) Loan Invitation to Apply as Provided by the US Environmental Protection Agency (USEPA)

On December 21, 2022, the District received a letter invitation from the USEPA to apply for a WIFIA loan for up to \$44,062,000, which is to be at most 49% of the total eligible project cost. The deadline to apply is December 31, 2023. Unfortunately, the District does not have a suitable project or the required debt/ratio to repay the loan. Staff will notify USEPA about the inability to apply for this loan. The Board thanked Staff for the time and hard work that was put into trying to secure these funds.

7. GENERAL MANAGER’S ITEMS

Jason Dafforn, General Manager, informed the Board of the District’s participation in the College of the Desert’s Great Alumni Hunt. Staff have teamed up with a College of the District student to help him gain points and win a scholarship. Mr. Dafforn stated that the District's exhibit at the Coachella Valley History Museum is complete and ready for the Board to schedule a tour. On October 3, 2023, the District is participating in the Indio Police Department's National Night Out. The District will have a booth and the VSD camera van at the event.

8. COMMITTEE REPORTS

- 8.1 Draft Minutes of the Community Engagement Committee Meeting – September 19, 2023

Chairperson Scott Sear gave an update on the September 19, 2023 Community Engagement meeting. The Committee received an update on the Social Media and Public Relations Request for Proposals, the 100 Year Celebration, possible outreach opportunities with the UC Riverside STEM program, and National Night Out participation.

9. DIRECTOR’S ITEMS

Vice President Duran attended the JFK Memorial Luncheon. He stated they have very good keynote speakers and would like to see Staff attend next year.

10. INFORMATIONAL ITEMS

CSDA Special District Leadership Foundation is held in Sonoma, California, on October 22-25, 2025.

11. ADJOURNMENT

There being no further business to discuss, the meeting was adjourned at 1:29 p.m. The next regular Board meeting will be on October 10, 2023.

Respectfully submitted,

Holly Gould, Clerk of the Board
Valley Sanitary District



Valley Sanitary District

DATE: October 10, 2023
TO: Board of Directors
FROM: Jeanette Juarez, Chief Administrative Officer
SUBJECT: APPROVE WARRANTS FOR OCTOBER 10, 2023

Suggested Action

Approve

Strategic Plan Compliance

GOAL 5: Long-Term Financial Strength

Fiscal Impact

The total charges incurred for the warrants from September 19, 2023, through October 2, 2023, are \$990,056.50.

Environmental Review

This item does not qualify as a project as defined by the California Environmental Quality Act (CEQA).

Background

The attached warrants list shows all disbursements from September 19, 2023, through October 2, 2023.

Recommendation

Staff recommends that the Board of Directors approve the warrants for October 10, 2023.

Attachments

[Warrants for October 10, 2023.pdf](#)

DISBURSEMENTS
Approved at the Board Meeting of
October 10, 2023

41936 Alfa Laval Inc.	Klinger sil	\$467.63
41936 Alfa Laval Inc.	Filter hyd spin on	\$127.79
41937 Cintas Corp	Uniforms, mats, towels etc - 09/08/2023	\$565.85
41938 D & H Water Systems	1/2" TU ball valve CPVC	\$697.36
41939 Innovative Federal Strategies LLC	Federal advocacy - August services 2023	\$7,185.05
41940 MCR Technologies, Inc.	Labor, mileage, meter recalibration	\$1,589.90
41941 Polydyne, Inc.	Polymer delivery - 09/12/2023	\$8,543.27
41942 RA Batchelor Co	Annual inspection certification 38 autocrane	\$450.00
41943 TSI Incorporated	VelociCalc air velocity meter	\$1,666.51
41944 United Way of the Desert	PR 09/01/2023 - 09/14/2023 PD 09/22/2023	\$20.00
41945 USA Blue Book	Hach nitrification inhibitor	\$409.85
41946 Automation Pride	Broken gate repairs	\$795.81
41946 Automation Pride	Install warranty faceplate gate 2	\$190.00
41947 Beck Oil, Inc.	Shell corena s4 r 32	\$1,244.97
41948 California Chemical	Sodium hypo - 09/19/2023	\$12,325.85
41948 California Chemical	Sodium hypo - 09/08/2023	\$12,375.30
41948 California Chemical	Sodium hypo - 09/25/2023	\$12,501.69
41949 Carollo Engineering, Inc	EVRA RWP Services - August 2023	\$10,186.20
41950 Cintas Corp	Uniforms, mats, towels etc - 09/21/2023	\$534.28
41950 Cintas Corp	Uniforms, mats, towels etc - 09/14/2023	\$531.20
41951 Consolidated Electrical Distributors, Inc.	Port cord	\$1,124.15
41951 Consolidated Electrical Distributors, Inc.	Galvanized steel	\$156.76
41952 Daniels Tire Service, Inc.	2014 f150 tires (4)	\$755.86
41953 Desert Arc	Janitorial services - August 2023	\$3,500.36
41954 Enthalpy Analytical, LLC	Fathaed minnow chornic EFF-001C Quarterly testing - 09/01/23	\$1,025.00
41955 Facilities Protection Systems	OSD detector	\$479.92
41955 Facilities Protection Systems	Fire system repair	\$840.00
41956 Geotab USA, Inc	Vehicle telemetrics - August 2023	\$584.75
41957 GRBCON, Inc	Indio downtown sewer improvement - 08/16/2023-9/20/2023	\$578,405.03
41958 Haaker Equipment Company	BIT inspections 6 vehicles	\$1,695.87
41959 J.G. Tucker & Sons, Inc.	O2 sensor mx4, orange w/ pump	\$346.88
41960 Jacky Barnum	CSDA annual conference and expo 2023	\$1,713.85
41961 Linde Gas & Equipment Inc.	Tank rental - 09/20/2023	\$157.09
41962 Master's Refreshment Services LLC	Water delivery - 09/18/2023	\$286.25
41963 McMaster-Carr Supply Co.	316 stainless steel domed head blind rivets	\$136.35
41963 McMaster-Carr Supply Co.	Screw down split bolt splice wire, copper wire	\$339.23
41964 Motion Industries, Inc.	1.75 gasket seal	\$13.72
41964 Motion Industries, Inc.	Fan only, electrical repair parts	\$83.65
41964 Motion Industries, Inc.	Z40120 1hp motor, z71110 pump	\$10,039.32
41965 NBS Government Finance Group	Q4 2023 admin fees 10/01/2023-12/31/2023	\$4,375.00
41966 OpenGov, Inc	Opengov software - 10/01/2023-9/30/2024	\$15,588.00
41967 Quinn Company	Leak in cat telehandler offset by cm BOA30000108	\$3,235.47
41967 Quinn Company	Filter lube, coupler AS-Q	\$121.14
41968 Sharray Riddle	Refund 2022/2023 sewer fees on tax roll	\$2,201.10
41969 Southwest Networks, Inc.	Guardian IT managed, office 365 backup oct-dec 2023	\$9,096.00
41969 Southwest Networks, Inc.	Guardian storage - Oct 2023	\$699.00
41969 Southwest Networks, Inc.	Labor charges - Sept 2023	\$213.75
41970 Stantec Consulting Services, Inc.	IPS rehab owners rep - July - Aug 2023	\$1,932.90
41971 Staples Advantage	New charges - sept 2023	\$394.04
41972 Steven Shepard	Work boot reimbursement - 09/26/2023	\$156.53
41973 Superior Truck & Auto LLC	Rubber fiber gasket, gear oil	\$492.70
41974 Thomas Scientific	Pans aluminum 105MM	\$43.69
41974 Thomas Scientific	TSA USP irrads 3 15x100mm plate pk 10	\$49.74
41975 Tops 'N Barricades Inc.	Decals	\$127.78
41975 Tops 'N Barricades Inc.	No trespassing sign	\$130.50
41976 United Refrigeration Inc.	Fusetron class rk5, fieldpiece silicone, socket, capacitor	\$213.99
41976 United Refrigeration Inc.	Calgon detector spray, arekroil spray, klein flip socket	\$493.04
41977 United Way of the Desert	PR 09/15/2023 - 09/28/2023 PD 10/06/2023	\$20.00
41978 Univar Solutions	Sodium bisulfite - 09/25/2023	\$5,882.02
41979 USA Blue Book	Hach bod nutrient buffer pillows	\$140.27
41979 USA Blue Book	HM Solujet detergent 1 gallon	\$88.51
41980 Valley Office Equipment, Inc	Sharp copier maintenance - 8/13/2023-9/12/2023	\$106.70
41981 Walters Wholesale Electric	Male union, flexible coupling	\$1,161.50
41982 Willdan Financial Services	Arbitrage rebate services 2004 -VSD	\$775.00
202309271 SPOK, Inc.	Pager service - September 2023	\$26.28
202309272 Colonial Life	PR 08/18/2023 - 08/31/2023 PD 09/08/2023	\$1,057.73
202309272 Colonial Life	PR 09/01/2023 - 09/14/2023 PD 09/22/2023	\$1,057.73
202309291 Pitney Bowes, Inc.	Postage meter rental - July - Sept 2023	\$170.37
202309301 Domino Solar LTD	Electricity - August 2023	\$8,278.96
202309302 Imperial Irrigation District	Electricity - August 2023	\$69,842.18
202309303 De Lage Landen Financial Services, Inc	Sharp copier lease payment - 09/30/2023	\$212.07
202309304 Pitney Bowes, Inc.	Postage refill - 07/26/2023	\$208.99
202310011 Standard Insurance Company	Disability and life insurance - October 2023	\$1,843.93
202310031 Rudy's Pest Control	General pest - 09/13/2023	\$200.00
202310031 Rudy's Pest Control	Termite inspection - 09/15/2023	\$90.00
202310041 Imperial Irrigation District	Electricity - August 2023	\$584.39
202310042 Verizon Wireless	Cell service - September 2023	\$1,177.64
202310051 City of Coachella	Water - September 2023	\$48.02
202310061 Paychex - Direct Deposit	PR 09/15/2023 - 09/28/2023 PD 10/06/2023	\$100,841.22

202310062 Paychex - Fee	PR 09/15/2023 - 09/28/2023 PD 10/06/2023	\$268.97
202310063 Paychex - Garnishment	PR 09/15/2023 - 09/28/2023 PD 10/06/2023	\$360.46
202310064 Paychex - Tax	PR 09/15/2023 - 09/28/2023 PD 10/06/2023	\$47,761.63
202310065 Empower (formerly Mass Mutual)	PR 09/15/2023 - 09/28/2023 PD 10/06/2023	\$10.00
202310066 Mission Square (formerly ICMARC / Vantage Point)	PR 09/15/2023 - 09/28/2023 PD 10/06/2023	\$1,470.00
202310067 Nationwide Retirement Solution	PR 09/15/2023 - 09/28/2023 PD 10/06/2023	\$2,271.72
202310068 CalPERS 457	PR 09/15/2023 - 09/28/2023 PD 10/06/2023	\$870.00
202310069 CalPERS Retirement	PR 09/15/2023 - 09/28/2023 PD 10/06/2023	\$27,737.03
202310101 Indio Water Authority	Water - August 2023	\$1,836.26
	Total	\$990,056.50



Valley Sanitary District

DATE: October 10, 2023
TO: Board of Directors
FROM: Tino Tijerina, Facility Miantenance Supervisor
SUBJECT: AUTHORIZE THE GENERAL MANAGER TO APPROVE THE REBUILD OF INFLUENT PUMP #5

Suggested Action

Approve

Strategic Plan Compliance

GOAL 3: Excellent Facilities

Fiscal Impact

The repairs to Influent Pump #5 will be funded from the maintenance and repair budget.

Environmental Review

This does not qualify as a project for the purposes of CEQA.

Background

Influent Pump #5 failed to operate under normal conditions, staff removed the pump and requested Xylem to investigate. Upon disassembly, Xylem determined the pump had extensive water damage and confirmed that a complete rebuild will be required.

Recommendation

Staff recommends that the Board of Directors authorize the approval of the rebuilding of Influent Pump #5 in the amount of \$30,079.60.

Attachments

[09282023_014847PM.pdf](#)

[09282023_014905PM.pdf](#)

Tino Tijerina

From: Padilla, Manny - Xylem <Manny.Padilla@xylem.com>
Sent: Monday, September 25, 2023 12:01 PM
To: Tino Tijerina
Cc: Jimmy Garcia; Octavio Briones
Subject: RE: Influent pump #5
Attachments: R2023-LAB-0043.pdf

Hi, Tino

Attached you will find repair estimate, below is the cause of failure possibly a power spike

Should you have any questions please feel free to contact me, thanks!



MANNY PADILLA, JR.
Flygt Sales Representative
Cell 562.760.9258
Office 951.332.3669
11161 Harrel St
Mira Loma, Ca 91752
manny.padilla@xylem.com



VSD

Purchase Order

Please legibly print the information needed below.

Please attach all necessary documentation to the Purchase Order.

45-500 Van Buren Street
Indio, CA 92201
Phone: 760-238-5400

PO # format:	MMDDYYYY-Initials
Purchase Order #:	09262023 TT
Date:	09/26/2023
Requested By:	TINO Tijerina

Vendor Name:	Xylem Water Solutions USA, Inc.
Address:	11161 Harrel Street
City, State, Zip:	Mira Loma, CA. 91752
Phone #:	951-332-3668
Attention:	Manny Padilla

Need By	Ship Via	Ordered By	Terms

Quantity	Description	Unit Price	Extended Price
1	85 HP Influent Pump #5 Rebuild.	\$27,871.82	\$27,871.82
	Note: See Attached Quote		
	Shipping / freight (estimate, if necessary)		

ACCOUNT #	
QUOTE #:	
NOTES AND COMMENTS:	
	SUBTOTAL
	TAX 8.75 %
	TOTAL

\$ 2207.78-
\$30,079.60

APPROVALS, AS NEEDED:

SUPERVISOR:		Date: 09/26/23
MANAGER:	Dir. M. Commins	Date: 09/26/23
FINANCE:		Date:
GEN'L MGR:		Date:
BOARD:		Date:

(SECTION III) EXPLANATION

(Use additional sheet if needed)

Xylem is the Flygt Representative for Southern California.

(SECTION IV) AUTHORIZATION/APPROVALS

Department Maintenance

Requisition/Order Number 092023 TT

Department Head Signature Dave N. Commons

Printed Name Dave N. Commons

General Manager's Signature _____

Date _____



Single/Sole Source Justification Form

Use for all purchases of \$10,000 or more for Goods/Equipment, \$5,000 or more for Services, \$15,000 or more for Public Works/Facilities when the lowest bid has not been selected or where competition may not be feasible due to the single source/sole source nature of a commodity or a particular specification

Brief Description of Purchase: Rebuild 85 HP Influent pump #5
Selected Vendor: Xylem Water Solutions

Check boxes as appropriate:

(Section I) Source Justification

Part A

Award to SINGLE SOURCE (check one)

- Reorder based on previous bid or analysis (within one year). Send copy of previous quote.
Supply previous purchase order number _____ PO Date _____
- Repair service parts unavailable from any other source except original equipment manufacturer or their designated servicing dealer.
- Compatibility of equipment or supplies required. Lit equipment with which purchase will be used: Model Number _____ Serial Number _____
- Upgrade to existing software. Available only from the producer of this software who sells on direct basis only.
- Used or demonstration equipment available at lower-than-new-cost. (Provide a copy of quote showing used vs. new Pricing.)
- Other (Explain in Section III)

Part B

Award to SOLE SOURCE (Check box below)

- Only known source in the world. (Explain technical or other reasons why similar or like items are not available for cost/price analysis in Section III)

(Section II) ESTABLISHMENT OF PRICE REASONABLNESS

Analysis of offer and/or offers has determined that the price proposed is determined to be fair, reasonable and in the best interest of the District based on the following:

- Price obtained was from a catalog or standard price list regularly maintained by the vendor covering standard commercial products sold. (Attach copy of vendor's price list.)
- Price obtained includes a discount from current list prices. (Attach copy of quote showing list price and net price paid.)
- Other. (Explain Below.)



**Xylem Water Solutions USA, Inc.
Flygt Products**

September 20, 2023

11161 Harrel Street
Mira Loma, CA 91752
Tel (951) 332-3668
Fax (951) 332-3679

VALLEY SANITARY DISTRICT
45500 VAN BUREN ST
INDIO CA 92201-3435

Quote # R2023-LAB-0043
Project Name: VALLEY SANITARY DISTRICT
Job Name: VALLEY SANITATION DISTRICT

Block 1				
Qty	Part Number	Description	Unit Price	Extended Price
2	83 53 54	SUPPORT,END	\$ 9.21	\$ 18.41
3	83 53 58	CLAMP,TERMINAL	\$ 11.16	\$ 33.48
6	83 53 62	CLAMP,TERMINAL	\$ 127.41	\$ 764.46
3	83 53 63	CONNECTION,CROSS	\$ 56.73	\$ 170.19
2	84 19 35	GROMMET,NBR 45ID 70OD 33L	\$ 61.38	\$ 122.76
45	94 21 11	CABLE,SUBCAB AWG 1/3-2-1- GC+ 41.7MM	\$ 86.49	\$ 3,892.05
1	608 59 01	JACKET,COOLING 316	\$ 2,253.39	\$ 2,253.39
1	650 51 00	CABLE UNIT	\$ 121.83	\$ 121.83
1	654 82 01	STATOR,35-29-6A 460VD	\$ 7,382.34	\$ 7,382.34
1	657 17 05	KIT,REPAIR BASIC 3301.180	\$ 9,606.90	\$ 9,606.90
1	663 04 00	SENSOR,LEVEL FLS-10	\$ 415.71	\$ 415.71
1	800 45 03	LEAD-THROUGH UNIT	\$ 235.29	\$ 235.29
16	14-69 00 00A	LABOR,SVC FLYGT,NO TAX Z1-TP MODELS: 3000,7000,8000	\$ 165.00	\$ 2,640.00
1	14-69 00 21D	ENV FEE >50HP TP ENVIRONMENTAL FEE	\$ 110.00	\$ 110.00
1	14-69 00 24B	SHOP SUPPLIES-LARGE PUMPS TP MISC SHOP SUPPLIES FOR REPAIR	\$ 105.00	\$ 105.00
Total Price				\$ 27,871.81



Terms & Conditions

This order is subject to the Standard Terms and Conditions of Sale – Xylem Americas effective on the date the order is accepted which terms are available at <http://www.xyleminc.com/en-us/Pages/terms-conditions-of-sale.aspx> and incorporated herein by reference and made a part of the agreement between the parties.

- Purchase Orders:** Please make purchase orders out to: Xylem Water Solutions USA, Inc.
Freight Terms: 3 DAP - Delivered At Place 08 - Jobsite (per IncoTerms 2020)
See Freight Payment (Delivery Terms) below.
- Taxes:** State, local and other applicable taxes are not included in this quotation.
Back Charges: Buyer shall not make purchases nor shall Buyer incur any labor that would result in a back charge to Seller without prior written consent of an authorized employee of Seller.
- Shortages:** Xylem will not be responsible for apparent shipment shortages or damages incurred in shipment that are not reported within two weeks from delivery to the jobsite. Damages should be noted on the receiving slip and the truck driver advised of the damages. Please contact our office as soon as possible to report damages or shortages so that replacement items can be shipped and the appropriate claims made.
- Terms of Delivery:** Prepaid
Terms of Payment: 100% N30 after invoice date.
Xylem's payment shall not be dependent upon Purchaser being paid by any third party unless Owner denies payment due to reasons solely attributable to items related to the equipment being provided by FLYGT.
- Validity:** This Quote is valid for thirty (30) days.
Please note that this pricing is valid for 30 days and contingent upon final approval of submittals and release to fabrication by (within 90 days of bid date).
This quotation is subject to change if any changes to the specifications or plans are made that alter the scope of supply.
- Schedule:** Please consult your local Flygt Branch Office to get fabrication and delivery lead times.

Thank you for the opportunity to provide this quotation. Please contact us if there are any questions.

Sincerely,

Joshua Duguay
Customer Experience Specialist





Customer Acceptance

This order is subject to the Standard Terms and Conditions of Sale – Xylem Americas effective on the date the order is accepted which terms are available at <http://www.xylem.com/en-us/Pages/terms-conditions-of-sale.aspx> and incorporated herein by reference and made a part of the agreement between the parties.

A signed copy of this Quote is acceptable as a binding contract.

Purchase Orders: Please make purchase orders out to: Xylem Water Solutions USA, Inc.

Quote #: R2023-LAB-0043
Customer Name: VALLEY SANITARY DISTRICT
Job Name: VALLEY SANITATION DISTRICT
Total Amount: \$ 27,871.81
(excluding freight)

Signature: _____ Name: _____
(PLEASE PRINT)

Company/Utility: _____ PO: _____

Address: _____ Date: _____

_____ Phone: _____

_____ Email: _____

_____ Fax: _____





Introducing the Xylem Preventative Maintenance Agreement

Don't forget to protect your new assets

Thank you for considering Xylem for your pumping equipment needs. We appreciate the significance of your purchase decision and want to ensure you get the most out of your investment. The most cost-effective way to do this is to sign-up for a preventative maintenance agreement (PMA) that we tailor to your specific requirements and budget. A Xylem PMA offers a proven method to extend your equipment life, prevent expensive repairs and minimize unplanned failures. It's also ensures you remain in compliance with environmental, health and other government regulations – critical to maximizing operation uptime.

Our Flygt Gold PMA Includes:

- One scheduled preventative maintenance service visit with multi-point inspection, 12 months after purchase and discounted access to Xylem's rental fleet
- An additional 12-month warranty when purchased with your new or replacement Flygt pump(s)
- The option to renew annually or on a multi-year basis following the first service visit
- Priority service on repairs and field service calls

** Flat-Rate Pricing is available for new and replacement Flygt models 3069, 3085, 3102, 3127, 3153, 3171, 3202, 3301 & 3315 starting at \$500 per pump.*

Multi-year PMA packages are available as well.
Contact your Xylem Sales Representative today for more information.

Visit our [PMA site](#) for more info

xylem
Let's Solve Water 19



Introducing the Xylem Preventative Maintenance Agreement

Don't forget to protect your new assets

Thank you for considering Xylem for your pumping equipment needs. We appreciate the significance of your purchase decision and want to ensure you get the most out of your investment. The most cost-effective way to do this is to sign-up for a preventative maintenance agreement (PMA) that we tailor to your specific requirements and budget. A Xylem PMA offers a proven method to extend your equipment life, prevent expensive repairs and minimize unplanned failures. It's also ensures you remain in compliance with environmental, health and other government regulations – critical to maximizing operation uptime.

Our Flygt Gold PMA Includes:

- One scheduled preventative maintenance service visit with multi-point inspection, 12 months after purchase and discounted access to Xylem's rental fleet
- An additional 12-month warranty when purchased with your new or replacement Flygt pump(s)
- The option to renew annually or on a multi-year basis following the first service visit
- Priority service on repairs and field service calls

** Flat-Rate Pricing is available for new and replacement Flygt models 3069, 3085, 3102, 3127, 3153, 3171, 3202, 3301 & 3315 starting at \$500 per pump.*

Multi-year PMA packages are available as well.
Contact your Xylem Sales Representative today for more information.

Visit our [PMA site](#) for more info

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Let's Solve Water 20



Valley Sanitary District

DATE: October 10, 2023
TO: Board of Directors
FROM: Jason Dafforn, General Manager
SUBJECT: AUTHORIZE THE GENERAL MANAGER TO EXECUTE A ONE-YEAR CONTRACT FOR SOCIAL MEDIA AND PUBLIC RELATION SERVICES IN THE AMOUNT OF \$116,931

Suggested Action

Approve

Strategic Plan Compliance

GOAL 4: Increase Community Understanding and Support

Fiscal Impact

This is a budgeted item within the current FY 23-24 budget.

Environmental Review

This does not qualify as a project for the purposes of CEQA.

Background

For almost 98 years, Valley Sanitary District has been the best kept secret in the Valley. Moving forward, this will no longer be the case. The Board of Directors and Staff have committed to changing the current dynamic and making the District one of the most respected and understood government agencies in the Valley. To achieve this high level of public knowledge and understanding, the District requires the services of a well-respected social media and public relations team of experts. Staff prepared a Request for Proposals that described and outlined the District needs which generally included the following tasks to be provided by the consultant:

- Community Outreach
- Public Relations
- Social Media
- Video Presentation
- Centennial Celebration Planning
- Account Management

- Reporting

On August 1, 2023, a Request for Proposals (RFP) was issued through our online procurement portal OpenGov.

On August 24, seven proposals were received by the posted deadline. The proposals were first evaluated to ensure that all the required information/documentation was properly submitted with the proposal. Unfortunately, two of the proposals did not submit all the required information and those proposals were considered non-responsive and removed from the review process. Five properly submitted proposals were then sent to a panel for review and scoring. The proposals were evaluated on the following categories utilizing a 100-point scoring system:

1. Understanding of Project and Project Approach - 30%
2. Scope of Work and Schedule - 25%
3. Relevant Qualifications/Experience - 25%
4. Overall Quality of Proposal - 10%
5. Cost Evaluation - 10%

The proposals were ranked in order from one through five and the evaluations are summarized below:

Vendor	Evaluator 1	Evaluator 2	Evaluator 3	Evaluator 4
Ardurra Group, Inc.	82% (1)	93% (1)	92% (2)	84% (2)
Regional Government Services Authority	79% (2)	78% (2)	93% (1)	86% (1)
Tripepi Smith and Associates, Inc.	72% (3)	66% (3)	88% (3)	76% (3)
NBS	67% (4)	56% (4)	85% (4)	68% (4)
TOC Public Relations	17% (5)	11% (5)	38% (5)	45% (5)

The top two firms were then invited to participate in a panel interview which included a presentation followed by a question-and-answer session.

On September 27, the two selected firms participated in the interview process. Staff was able to clearly identify the best firm to recommend the Board of Directors award a contract. The scoring summary from the panel interviews are as follows:

Vendor	Evaluator 1	Evaluator 2	Evaluator 3	Evaluator 4
Ardurra Group, Inc.	90% (1)	90% (1)	90% (1)	80% (1)
Regional Governmental Services Authority	60% (2)	70% (2)	60% (2)	60% (2)

Recommendation

Staff recommends the Board of Directors approve a 1-year contract for social media and public

relations services with Ardurra Group, Inc. in the amount of \$116,931 and authorize the General Manager to execute the agreement.

Attachments

[Social Media Evaluation Tabulation Final.docx](#)

[Ardurra.pdf](#)

[Regional Government Services RGS.pdf](#)



EVALUATION TABULATION
RFP No. 2023-RFP-007
Social Media and Public Relations Services

RESPONSE DEADLINE: August 24, 2023 at 4:00 pm

Monday, October 2, 2023

VENDOR QUESTIONNAIRE PASS/FAIL

Question Title	Ardurra Group, Inc.	Regional Government Services Authority	NBS (Excluded)	TOC Public Relations (Excluded)
Have you read and agreed to all Terms and Conditions?	Pass	Pass	Pass	Pass
Submit Proposal Document Here	Pass	Pass	Pass	Pass

Question Title	Tripepi Smith and Associates, Inc (Excluded)	Business Marketing Solutions Group (Disqualified)	Coachella Valley Historical Society Inc. (DBA - Coachella Valley History Museum) (Disqualified)
Have you read and agreed to all Terms and Conditions?	Pass	Pass	Pass
Submit Proposal Document Here	Pass	No Response	No Response

PHASE 2

EVALUATION CRITERIA

Criteria	Scoring Method	Weight (Points)
Interview	0-10 Points	10 (100% of Total)

AGGREGATE SCORES SUMMARY

Vendor	Evaluator 1	Evaluator 2	Evaluator 3	Evaluator 4
Ardurra Group, Inc.	90% (1)	90% (1)	90% (1)	80% (1)
Regional Government Services Authority	60% (2)	70% (2)	60% (2)	60% (2)
NBS Excluded	0% (4)	0% (4)	0% (4)	0% (4)
TOC Public Relations Excluded	0% (4)	0% (4)	0% (4)	0% (4)
Tripepi Smith and Associates, Inc Excluded	0% (4)	0% (4)	0% (4)	0% (4)

Vendor	Total Score	Total Average Rank
Ardurra Group, Inc.	87.5%	1
Regional Government Services Authority	62.5%	2
NBS Excluded	0%	4
TOC Public Relations Excluded	0%	4
Tripepi Smith and Associates, Inc Excluded	0%	4

VENDOR SCORES BY EVALUATION CRITERIA

Vendor	Interview 0-10 Points 10 Points (100%)	Total Score
Ardurra Group, Inc.	87.5%	87.5%
Regional Government Services Authority	62.5%	62.5%
NBS Excluded	0%	0%
TOC Public Relations Excluded	0%	0%

EVALUATION TABULATION
RFP No. 2023-RFP-007
Social Media and Public Relations Services

Vendor	Interview 0-10 Points 10 Points (100%)	Total Score
Tripepi Smith and Associates, Inc Excluded	0%	0%

PHASE 1

EVALUATION CRITERIA

Criteria	Scoring Method	Weight (Points)
Understanding of Project and Project Approach	Points Based	30 (30% of Total)

Criteria	Scoring Method	Weight (Points)
Scope of Work and Schedule	Points Based	25 (25% of Total)

Criteria	Scoring Method	Weight (Points)
Relevant Qualifications/Experience	Points Based	25 (25% of Total)

Criteria	Scoring Method	Weight (Points)
Overall Quality of Proposal	Points Based	10 (10% of Total)

Criteria	Scoring Method	Weight (Points)
Cost Evaluation	Points Based	10 (10% of Total)

AGGREGATE SCORES SUMMARY

Vendor	Evaluator 1	Evaluator 2	Evaluator 3	Evaluator 4
Ardurra Group, Inc.	82% (1)	93% (1)	92% (2)	84% (2)
Regional Government Services Authority	79% (2)	78% (2)	93% (1)	86% (1)
Tripepi Smith and Associates, Inc	72% (3)	66% (3)	88% (3)	76% (3)
NBS	67% (4)	56% (4)	85% (4)	68% (4)
TOC Public Relations	17% (5)	11% (5)	38% (5)	45% (5)

Vendor	Total Score	Total Average Rank
Ardurra Group, Inc.	87.75%	1.5

EVALUATION TABULATION
RFP No. 2023-RFP-007
Social Media and Public Relations Services

Vendor	Total Score	Total Average Rank
Regional Government Services Authority	84%	1.5
Tripepi Smith and Associates, Inc	75.5%	3
NBS	69%	4
TOC Public Relations	27.75%	5

VENDOR SCORES BY EVALUATION CRITERIA

Vendor	Understanding of Project and Project Approach Points Based 30 Points (30%)	Scope of Work and Schedule Points Based 25 Points (25%)	Relevant Qualifications/Experience Points Based 25 Points (25%)	Overall Quality of Proposal Points Based 10 Points (10%)
Ardurra Group, Inc.	88.3%	86%	90%	87.5%
Regional Government Services Authority	86.7%	89%	87%	75%
Tripepi Smith and Associates, Inc	82.5%	82%	77%	57.5%
NBS	70.8%	75%	66%	55%
TOC Public Relations	29.2%	22%	33%	22.5%

Vendor	Cost Evaluation Points Based 10 Points (10%)	Total Score
Ardurra Group, Inc.	85%	87.75%
Regional Government Services Authority	65%	84%
Tripepi Smith and Associates, Inc	52.5%	75.5%
NBS	70%	69%
TOC Public Relations	30%	27.75%



PROPOSAL TO PROVIDE SOCIAL MEDIA AND PUBLIC RELATIONS SERVICES

August 24, 2023

Prepared for: Valley Sanitary District
Request for Proposal #2023-RFP-007





Valley Sanitary District
Holly Gould
Clerk of the Board
45500 Van Buren Street
Indio, CA 92201

RE: PROPOSAL TO PROVIDE SOCIAL MEDIA AND PUBLIC RELATIONS SERVICES

Dear Ms. Gould,

Our community relations team would be honored to serve Valley Sanitary District (VSD, the District) with community outreach and public relations services and are confident we can meet all the requirements of the RFP. We have enjoyed creating award-winning public relations programs – large and small – to support a variety of water and wastewater agencies, city departments and sanitary districts like VSD.

The Ardurra team proposed is highly experienced and attuned to the needs and scope of work you've presented in the RFP, and we hope to be considered to provide the services that will grow and move VSD forward with invaluable customer presence.

We agree that VSD is "the best kept secret in the Coachella Valley" and have worked with agencies that similarly are not well known even by their own customers, who may think sanitary services are city services.

PROVEN WORK IN WASTEWATER INFRASTRUCTURE & COMMUNICATIONS

When we started working with Ross Valley Sanitary District (RVSD) eight years ago, RVSD was experiencing the same challenges you face now, finding it difficult to communicate about services that are often unseen and underappreciated. With our disciplined and dedicated team, we have helped RVSD make significant strides and achieve proven results. For example, just this month, the local newspaper, [Marin IJ, Editorial Board](#) wrote that "RVSD deserves our thanks for addressing infrastructure issues."

As our case studies for long-time sanitary agency clients RVSD, the East County Advanced Water Purification program and the City of Oceanside's Water Utilities show, we have delivered proven results in communicating about complex wastewater issues and have created public relations and social media engagement programs that are successful in creating trust and support for crucial wastewater services and infrastructure.

WHY SELECT ARDURRA?

Our qualifications, experience and knowledge make us the right fit for you and our passion for communicating about wastewater, infrastructure and sustainability is unmatched. We know wastewater issues – locally, regionally, statewide and nationally – and have experience and documented success implementing every single item delineated in your scope of work. We bring an experienced bench of talented public relations professionals based in Southern California.

IN-HOUSE, FULL-SERVICE EXPERTISE

A key benefit is that we are a full-service agency with all the tools needed in-house, including graphic design, Spanish translation, event planners and media/social media experts. We will apply all of our strategic methods and expertise to deliver measurable success for you.

Please feel free to contact me by phone at 760.525.9995 or email CKasner@Ardurra.com or Rebecca Cole at 619.300.5044 or RCole@Ardurra.com. By signing this letter, please know I, Carmen Kasner, am authorized to bind the firm contractually.

Sincerely,

Carmen Kasner, PE
Southwest Operations Director

Rebecca Cole
Director of Community Relations



B | PROPOSER STATEMENT OF QUALIFICATIONS

1. EXECUTIVE SUMMARY

Ardurra is a proven team of communicators, engineers, and design professionals dedicated to serving our clients through our unique balance of experience and innovation. We are a leading provider of consulting solutions for public sector clients and we help clients communicate about the services they provide, infrastructure they maintain, construction projects underway and environmental stewardship programs that improve the communities where people live and work. We take pride in helping our clients plan and implement cost-effective, award-winning public relations campaigns.

The Ardurra communications team is comprised of experts in communications, copywriting, public outreach, social media, marketing, media relations and graphic design. We are specialists who have dedicated our careers to assisting public agencies to effectively communicate with its stakeholders, promote services, and educate and raise awareness. We offer essential and proven expertise to successfully serve VSD.

As a full-service agency, we have all the tools needed to service this contract in-house, including graphic design, web design, Spanish translation, event planners and social media experts.

We combine innovation and high quality, high-touch service and responsiveness. This is a key difference in achieving well-rounded, effective communication programs. By combining traditional public outreach expertise with innovative communication tools, our team can achieve immediate results.



Our core team members possess an unparalleled wealth of experience providing public relations and social media services for agencies and cities throughout southern California. Our team's work for similar districts includes Ross Valley Sanitary District, Encina Wastewater Authority, Jurupa Community Services District, the cities of Oceanside, Menifee, San Diego, Chula Vista, Carlsbad and National City, the San Diego County Water Authority, Vallecitos Water District, Helix Water District, Carlsbad Municipal Water District and a Joint Powers Authority for the East County Advanced Water Purification Project. Our knowledge and experience will allow us to seamlessly integrate into and serve as an extension of the VSD team.



2. QUALIFICATIONS AND EXPERIENCE

The Ardurra Community Relations team, led by Rebecca Cole, is uniquely qualified to deliver public relations and outreach services to support Valley Sanitary District because we focus on outreach programs like VSD's throughout Southern California. We are confident our work experience, skill sets and strong relationships with industry, community, government and media representatives will provide the needed depth and knowledge to achieve VSD's goals.

Full resumes and work samples are provided in the Appendix (page 33) for key staff involved in the performance of the scope of work.



EDUCATION
San Diego State
University, B.A. English

REBECCA COLE | PROJECT MANAGER

Rebecca brings 26 years of communications experience. As Director of Communications at Ardurra, she manages public affairs and community relations programs for infrastructure improvement programs and has developed and implemented award-winning public affairs programs for local governmental agencies that span Southern California. She specializes in public outreach with unique expertise in water including drinking, recycled, wastewater, indirect potable reuse, emergency water storage and conservation outreach. She collaborates with government agencies and cities to navigate the changing landscape that is normal in our desert region. Rebecca's expertise also includes a specialty in construction relations and environmental projects. She collaborates with elected officials, media representatives and civic groups throughout the San Diego region and on the statewide and national stage to achieve successful outcomes and meet important project milestones using a range of proven communication tactics. Rebecca has worked on controversial, high-profile projects in some of the most vocal and organized communities in the county. Weaving a variety of proven traditional and contemporary communication strategies and techniques into her campaigns, her tactics consistently achieve successful results by initiating open dialogue, facilitating collaboration and fostering credibility that turns ardent opponents into passionate supporters.

RELEVANT PROJECTS

- CIP and Environmental Programs, *City of Oceanside*
- Pure Water Oceanside, *City of Oceanside*
- East County Advanced Water Purification (AWP), *Joint Powers Authority*
- Avenida Encinas Construction, *City of Carlsbad*



EDUCATION
University of Arizona
BA, Political Science

George Washington
University
Public Relations
Certification

RACHEL KULIS | ASSISTANT PROJECT MANAGER

Rachel manages public affairs and community relations programs for projects throughout the San Diego region. She has 24 years of communication experience, specializing in the planning and implementation of award-winning public involvement, community education, construction outreach and marketing programs for government agencies and not-for-profits. Rachel specializes in writing visually appealing and easy to understand materials, overseeing branding and graphic design and planning special events. She has dedicated most of her career to managing community relations programs for water, wastewater, environmental, construction and transportation projects. Her skills also include public education, community-based social marketing, call to action messaging and perception/behavior change campaigns. Her exceptional writing style and tactical acumen conveys a professional and trustworthy voice and tone tailored to create a memorable and goal-achieving work product.

RELEVANT PROJECTS

- WaterSmart Meters, *City of Oceanside*
- Downtown Water and Sewer Pipeline Replacement Project, *City of Oceanside*
- Prevent Sewer Clogs, *City of National City*
- Water Rate Adjustment Public Information, *City of San Diego*



GABRIELA DOW | STRATEGIC GUIDANCE

Gabriela brings 30 years of experience in public affairs, media and government relations. Her experience includes developing communications strategies and programs, public outreach and engagement, construction management, message and collateral development, events management, media relations and incorporation of digital/social media technology. Her career includes print and TV news, service in the White House Office of Public Liaison (now the Office of Public Engagement), as an intergovernmental affairs officer for Governor Pedro Rossello of Puerto Rico and as lead facilitator for Kelco Community Advisory Panel in Barrio Logan. She has managed hundreds of engagement programs for public agencies and public/private partnership programs and developed communications strategies that include facilitation on sensitive topics. She has also worked to grow San Diego-based e-Government tech startups and thus developed her unique ability to leverage technology as a tool to maximize outreach and manage results-driven programs. A native of Guadalajara, Mexico, Gabriela is fluent in Spanish and offers true bicultural engagement for Latino communities.

EDUCATION

University of California, Los Angeles, B.A. English Literature and Communications

Universidad Complutense, Madrid, Spain, Journalism and International Relations

RELEVANT PROJECTS

- East County Advanced Water Purification (AWP), *Joint Powers Authority*
- CIP Program, *Ross Valley Sanitary District*
- As Needed Communications and Facilitation Services, *City of Carlsbad*
- Pure Water Oceanside, *City of Oceanside*



YOLANDA ART | COMMUNITY RELATIONS COORDINATOR

Yolanda is a community relations coordinator offering bilingual outreach that is also bicultural (as a native of Guadalajara, Mexico). She brings 15 years of experience that began serving as the secretary for the first community outreach meetings held by the Kelco Community Advisory Panel (CAP) in Barrio Logan, which included members of the San Diego Environmental Health Coalition, Barrio Logan Health Clinic, Barrio Station, and other community groups that were vocally and forcefully opposed to plant emissions and the corporation's very presence in the community. She also served as secretary for the County of San Diego TAC and as assistant project manager for projects like the City of Chula Vista Tenant Landlord Ordinance public education and Harborside Park engagement project. Yolanda's community engagement and special events management spans from water conservation and education outreach to transportation and as-needed municipal services. Her bilingual skills and organizational support are key for community relations project success.

EDUCATION

San Diego State University
B.A., Communications

RELEVANT PROJECTS

- East County Advanced Water Purification (AWP), *Joint Powers Authority*
- Capital Improvement Projects, *City of Carlsbad*
- CIP Program, *Ross Valley Sanitary District*
- Pure Water Oceanside, *City of Oceanside*
- CIP and Environmental Programs, *City of Oceanside*



SUSAN DUFFETT | SENIOR GRAPHIC DESIGNER

Susan is a graphic design professional with over 24 years of experience. Working with public agencies, large corporations and production departments, she has developed effective, cohesive and memorable campaigns. Susan excels in designing branding and carrying consistency throughout a variety of eye-catching collateral materials, including fact sheets, flyers, bill inserts, posters, social media graphics, brochures and signage. She has designed graphics for the Cities of Carlsbad, Chula Vista, Corona, Imperial Beach, Lemon Grove and Oceanside, Jurupa Community Services District, the Santa Fe Irrigation District, Olivenhain Municipal Water District, Padre Dam Municipal Water District, Ross Valley Sanitary District, San Diego County Water Authority and Vallecitos Municipal Water District.

EDUCATION
Platt College
Graphic Design
Diploma

RELEVANT PROJECTS

- East County Advanced Water Purification (AWP), *Joint Powers Authority*
- Pure Water Oceanside, *City of Oceanside*
- Oceanside Water Utilities
- CIP and Environmental Programs, *City of Oceanside*

Our talented graphic designers work with our public relations and communications experts to create engaging and targeted social media images that are branded for each client agency and bring in followers, support and understanding on Facebook, Instagram, Twitter/X, LinkedIn, Threads, NextDoor, Pinterest, TikTok, YouTube, and more.



LAUREN CLULOW | GRAPHIC DESIGNER

Lauren has 22 years of experience designing environmental graphics, marketing materials and brands for public and community relations firms as well as independently. Over the past five years, she has specialized in both print and digital marketing materials for regional and local government agencies and municipalities – including cities of Chula Vista, Carlsbad and Oceanside, as well as SANDAG, East Bay Municipal Utility District and Padre Dam Municipal Water District/East County Advanced Water Purification Program JPA – while focusing on transportation, water reuse and sustainability projects. She has a unique ability to educate, inform and inspire behavior change relating to all aspects of public works, engineering, infrastructure, transportation and water through eye-catching design.

EDUCATION
Carnegie Mellon
BFA, Communication
Design

RELEVANT PROJECTS

- CIP Program Communications, *Ross Valley Sanitary District*
- As-Needed Graphic Design, *City of Chula Vista*
- As-Needed Graphic Design, *Sweetwater Authority*
- As-Needed Graphic Design, *City of Carlsbad*

**EDUCATION**

California State University, San Bernardino, Master's in Public Administration, Water Resources Management emphasis

Macalester College, B.A., Biology

CARI DALE | STRATEGIC GUIDANCE

Cari is a skilled utility executive, having spent over 29 years in the public sector, leading the management of potable water, wastewater and water reclamation programs for a variety of agencies in Southern California. In these roles, she routinely guided relevant technical studies, programs and funding initiatives to develop reliable water supplies and ensure program implementation. For over a decade, she served as the City of Oceanside's Water Utilities Director where she oversaw annual operating and capital budgets in excess of \$200 million. Her political acumen has allowed the agencies she has represented to move forward with high-profile utility projects including San Diego County's first Potable Reuse Project, Pure Water Oceanside, recycled water system expansions as well as groundwater supply development. Cari is versed in water use planning estimates, water purchase agreements and the development of Master Plans, Conservation Master Plans, Urban Water Management Plans, and other critical water supply studies.

RELEVANT PROJECTS

- Pure Water Oceanside, *City of Oceanside*
- Water Utilities Director, *City of Oceanside, 2010-2014, 2016 -2022*

**EDUCATION**

BS Environmental Policy, Analysis, and Planning - University of California, Davis

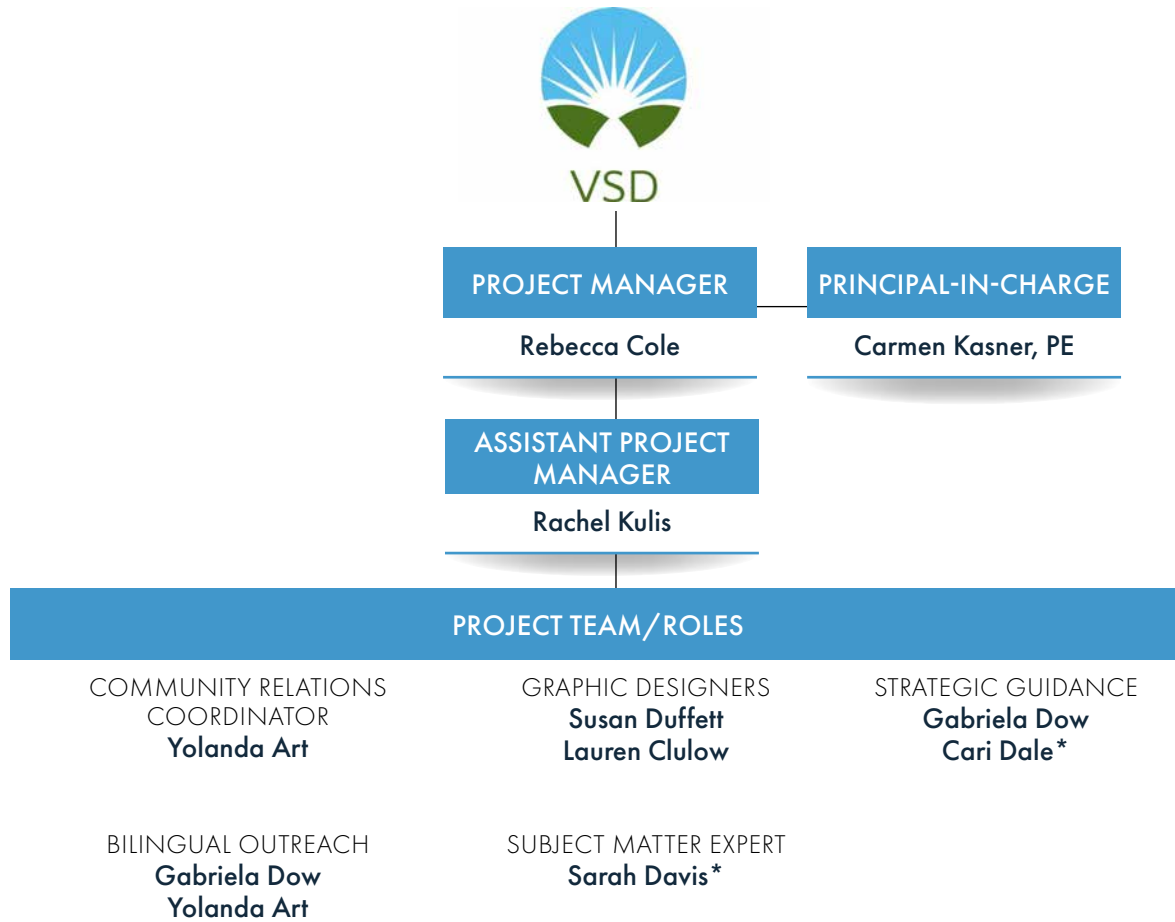
SARAH DAVIS | SUBJECT MATTER EXPERT

Sarah is an experienced water resource professional, with knowledge and technical experience in water, wastewater management planning, project management, regulatory advocacy, climate action, conservation, and public outreach. Sarah joined Hoch Consulting in February of 2022. Prior to joining Hoch Consulting, Sarah was with the City of Oceanside Water Utilities Department (water, wastewater, recycled water, and solid waste) for eight years. During this time, Sarah conducted water, wastewater trend forecasting, and regulatory advocacy, prepared technical reports, implemented strategic planning, and served as the communications and outreach liaison for the City of Oceanside's Water Utilities Department.

Sarah has a deep understanding of the importance of public awareness and engagement as it relates to public utilities throughout California. Customer acceptance and understanding are vital roles in any project, especially as it relates to utility services. Through her technical background, Sarah is able to effectively bridge the gap between technical projects and community relations and outreach. Sarah delivers credible, relevant, and timely information to the public in a cohesive and understanding manner in order to build and foster community trust and acceptance. Sarah has successfully implemented several high-profile customer-facing public outreach programs including automatic metering, FOG inspections, What-to-Flush, sewer maintenance, indirect potable reuse, device rebates, and leak detection.

RELEVANT PROJECTS

- Member Agency Administered Program (MAAP) (2020-2022), *City of Oceanside*
- Automated Metering, 2010-2014, 2016 -2022, *City of Oceanside*
- Unified Industrial Inspection Outreach (FOG), *City of Oceanside*
- Pure Water Oceanside, *City of Oceanside*
- Prop 218 noticing, *City of Oceanside*
- Recycled Water Expansion, *City of Oceanside*
- Sewer collection and lateral maintenance outreach, *City of Oceanside*



* Hoch Consulting - Sarah Davis and Cari Dale’s prior City of Oceanside Water Utilities experience and institutional knowledge can be an as-needed invaluable collaborative resource for Ardurra and VSD through this contract.

COMMITMENT TO VSD

The assigned personnel will not be substituted without your approval.

As Ardurra’s Southwest Operations Manager, I will assure the community relations team has the resources required to meet your needs. Having worked with this full-scale community relations team for 15 years, I’m confident they will continue to provide award-winning work you can showcase. The team’s passion, dedication and loyalty to wastewater agencies is unmatched in the industry!

Carmen Kasner

Carmen Kasner, PE
Southwest Operations Director





NUMBER OF YEARS ARDURRA HAS CONDUCTED BUSINESS

Ardurra was founded in 1977. We are proud to be a leading provider of consulting solutions specializing in water/wastewater, infrastructure, utilities, environmental health sciences and more. Our stability assures we will be available and committed for the duration of the contract.

ARDURRA

Sacramento
Oakdale
San Jose
Bakersfield
Los Angeles
Newport Beach
Oceanside
Temecula
San Diego

9 offices in CALIFORNIA

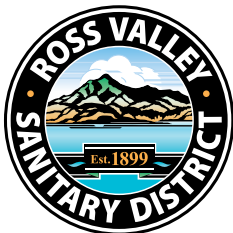
more than **200** professionals available in CA

NATIONWIDE resources of **1,250+** employees in **70+** OFFICES

Community Relations team has earned **20+ AWARDS** for strategic communications services

RELEVANT PROJECTS HELD WITHIN THE LAST FIVE YEARS

The case studies presented on the following pages exemplify the extensive breadth of experience our team possesses in public relations, communication and social media.





CASE STUDY 1

1 – WASTEWATER PUBLIC RELATIONS PROGRAM

ROSS VALLEY SANITARY DISTRICT

CLIENT REFERENCE: Felicia Newhouse

PHONE: 415-259-2949

EMAIL: fnewhouse@rvsd.org

PROGRAM VALUE: \$155,000

PROJECT DATES: 2015 – Present

AMENDMENTS/CLAIMS: None

PROJECT BACKGROUND

The Ardurra team works with Ross Valley Sanitary District (RVSD), located in Marin County, to implement communications and public outreach strategies that inform and educate customers, increase awareness and enhance perceptions about how their wastewater services are provided. As part of this work, Ardurra also manages all outreach for the agency’s ongoing \$100+ million Capital Improvement Program (CIP). Our team began working with RVSD more than eight years ago with a different firm to conduct the “360 for RVSD” community survey to gauge stakeholders’ awareness and understanding of RVSD services and community presence, as well as issues of concern and topics of interest. Using the results of the survey, our community relations team developed and continues to implement a communication a public relations program that has significantly improve perceptions.

OUR STRATEGY

Our team developed a Strategic Communications Plan with key messaging, strategies and tactics based on the results of a community survey that we administered for RVSD in 2017. The community survey (“360 for RVSD”) gauged stakeholders’ awareness and understanding of RVSD services and community presence, as well as issues of concern and topics of interest to stakeholders. Our team also measured how RVSD stakeholders prefer to provide and receive information related to RVSD. This insight was applied to engage stakeholders including, but not limited to, RVSD customers, local government senior management, elected officials, school districts, the local business community, the local media OP/ED board, the environmental community, outdoor enthusiasts, and the contractor/Marin Builders community. The Strategic Communications Plan has been updated year to year as a living document that guides the agency in implementing and sustaining effective communications programs with updated recommendations for clear branding and updated messaging and imagery via the following specific tactics and deliverables.

AS SEEN IN

Ross Valley Sanitary District Shines: From Utility Transformation to Statewide Recognition!

Ross Valley Sanitary District has been recognized for its **excellent** operations and commitment to innovation, as the utility was named Wastewater Collection System of the Year by the California Water Environment Association

July 11, 2023 - Just two short years ago, Municipal Sewer & Water profiled the Ross Valley Sanitary District – a wastewater utility hailing from San Rafael, California – which had undergone a comprehensive transformation. The utility has been awarded the prestigious Wastewater Collection System of the Year in the Small System category by the California Water Environment Association. RVSD was selected as the top sewer system in the state in 2022 out of the hundreds of systems less than 250 miles in length.

“Our focus on delivering projects and results in a data-driven manner, at all levels of our organization, was recognized by the CWEA judges. We will continue to look for innovative and cost-effective ways to provide excellent customer service to our local community, while renewing and maintaining the infrastructure that protects our health and water environment.”
- Steve Moore, RVSD General Manager

Ross Valley Sanitary District General Manager Steve Moore (second from left), is joined with operations managers, from left, Noel Sandoval, Manny Virgil and Rafael Zarco in the district’s yard in Larkspur, California

Home - About - GM Bulletin

GM Bulletin

RVSD provides the General Managers' Monthly Bulletin (GM Bulletin) to stay connected to the community we serve. We welcome your feedback on any information in the bulletin. Email: [Administrative.Staff](mailto:Administrative.Staff@rvsd.org)

Join the [GM Bulletin Email List](#).

Click on each of the tabs below to view individual GM Bulletins by year!

2023 | 2022 | 2021 | 2020 | 2019 | 2018 | 2017

- December 2022
- November 2022
- October 2022
- September 2022
- August 2022
- July 2022
- June 2022
- May 2022
- April 2022
- March 2022
- February 2022
- January 2022

Select Language

Our team created the monthly GM bulletin newsletter and has produced/distributed it for RVSD since 2017.

Ross Valley Sanitary District

General Manager's Monthly Bulletin

July 2023

AS SEEN IN

Ross Valley Sanitary District Shines: From Utility Transformation to Statewide Recognition!

Ross Valley Sanitary District has been recognized for its **excellent** operations and commitment to innovation, as the utility was named Wastewater Collection System of the Year by the California Water Environment Association

July 11, 2023 - Just two short years ago, Municipal Sewer & Water profiled the Ross Valley Sanitary District – a wastewater utility hailing from San Rafael, California – which had undergone a comprehensive transformation. The utility has been awarded the prestigious Wastewater Collection System of the Year in the Small System category by the California Water Environment Association. RVSD was selected as the top sewer system in the state in 2022 out of the hundreds of systems less than 250 miles in length.

“Our focus on delivering projects and results in a data-driven manner, at all levels of our organization, was recognized by the CWEA judges. We will continue to look for innovative and cost-effective ways to provide excellent customer service to our local community, while renewing and maintaining the infrastructure that protects our health and water environment.”
- Steve Moore, RVSD General Manager

July has been a busy month, culminating in the Pump Station 14 (Larkspur) ribbon cutting on July 19. More than 50 community members and agency officials attended the celebration. Additionally, RVSD was featured in the July issue of Municipal Sewer & Water magazine. “From Utility Transformation to Statewide Recognition.” The article acknowledges RVSD as the proud recipient of the esteemed 2022 CWEA Wastewater Collection System of the Year Award. Click below for our other noteworthy accomplishments, updates, and notifications.

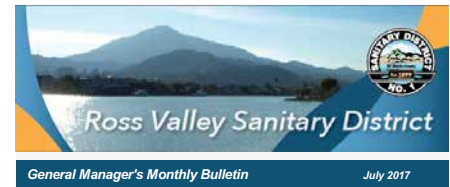


UTILIZED TACTICS

Our team applies tactics to educate RVSD stakeholders about local issues such as removal of chemical contaminants from RVSD's Larkspur Landing property, field smoke testing to check for sewer pipe blockages and leaks and methods used to repair or replace existing sewer pipes and related infrastructure. This information is contained in outreach materials, the RVSD website and social media, all of which we manage.

Tactics we employ include collateral materials creation, a monthly GM Bulletin newsletter, sewer rate increase information, smoke testing resources and CIP construction notices/advisories. We also manage media relations, print advertising, door-to-door notifications, workshop planning, presentations and more.

- Managed a photo shoot to obtain images for use in digital and print format.
- Create and deploy a monthly General Manager Bulletin e-newsletter.
- Implement special events, community workshops and ribbon cuttings.
- Prepared press releases and media advisories, as well pitched RVSD news to industry publications and local/regional media outlets. We also built out RVSD's media contact list and in responding to media inquiries.
- Managed standard ad rotations; developing, reviewing, updating and coordinating a standard print/web ad sequence of ads that are placed in local community newspapers and other print and digital opportunities including social media platforms.
- Manage development of a new district website; replacing the existing outdated RVSD website with an improved aesthetic, content layout, and functionality to serve as a platform for future communications plan elements. We transferred information for hundreds of pages, testing, branding, graphic design, roll-out and final adoption.
- Developed brochures, fact sheets and informational materials in print and digital formats.
- After conducting a Social Media Audit for RVSD, we implemented a specific platform via NextDoor and placement of community workshops and key projects via partner agency and elected officials' Facebook, Twitter, Instagram platforms.
- Manage engagement of RVSD customers and regional community on specific projects and the comprehensive CIP construction effort of multiple projects, including development of Construction Advisories and door-to-door notifications and alerts.
- Advised the General Manager on conveying community impacts from the use of potentially controversial methods to repair and/or replace sewer pipe - such as the release of emissions via use of Cured in Place pipe lining method through a project information sheet and a local Town Council presentation.
- Managed "Customer Alert" on the RVSD website during PG&E's planned outages in late October 2019.
- Manage public communication during cleanup of polychlorinated biphenyls (PCBs) at RVSD's Larkspur Landing site.



As part of Ross Valley Sanitary District's (RVSD) ongoing efforts to improve communications and outreach with the community we serve, RVSD is providing this monthly news bulletin of current notable activity and events. We welcome your feedback on any information in the bulletin and if at any time you no longer prefer to receive this information, simply unsubscribe using the link below.

More information on the topics below can be found in the June RVSD Board meeting agenda package, available for download at www.RVSD.org.

Thank You for a Successful Community Workshop: The Board and RVSD managers hosted a Community Workshop on June 21, 2017, to share information related to the District's upcoming capital construction projects, lateral grant program, budget and finances, community survey and remediation efforts for the 2000 Larkspur Landing property. Thank you to all members of the public and agency partners who joined us with great questions. Our dedicated staff and community groups helped to make this evening a success. [Click here to see a photo collage of this event.](#)

Community Survey Extended to Midnight Tonight: The response to our online community survey has been much appreciated, and we extended the deadline to June 30th at the request of a local environmental group who wanted to invite their partners to participate. Please [click here](#) to complete the 5-minute survey that will allow us to better understand your customer service needs.

Adoption of Fiscal Year (FY) 2017-18 Budget: The RVSD Board unanimously approved the District's FY 2017-18 Budget, which is organized along two primary revenue and spending categories: Operations and Maintenance (O&M) and Capital. District revenues in the new FY include \$19.2 million in wastewater utility service rate revenue, \$6.7 million in ad valorem property tax revenue, and one-time proceeds from a \$25 million long term bond issuance. The ad valorem revenue and bond proceeds are for capital assets (infrastructure) use only. Major categories of O&M expenses include personnel costs and CMSA treatment charges. Total personnel costs are \$6.25 million, remaining flat over the past five FYs. CMSA charges are \$7.6 million, a six percent (6%) increase over the prior FY. Capital costs include approximately \$28 million in construction projects for rehabilitation and replacement of aging pipelines and pump stations, \$1.9 million for sewer lateral replacement assistance, \$3.5 million for long-term debt service, and \$7 million for remediation of the parcel at 2000

PROJECT RESULTS

When we started working with RVSD eight years ago, the District was experiencing the challenges of difficulty in communicating about services that are often unseen and underappreciated. Our disciplined and dedicated services helped RVSD make significant strides to the point where in **August 2023 the Marin IJ Editorial Board wrote the following headline "Ross Valley Sanitary deserves our thanks for addressing infrastructure issues."**

The community is informed about key projects and related information at all levels and positive comments have been provided about the timeliness and quality of the information, photos, website usability, etc. The Assistant General Manager explained that our team, "provided RVSD with an unprecedented opportunity to share wastewater news and technology advancements to our 47,000 rate payers with cohesive and professional branding through prepared monthly GM Bulletins, website management, NextDoor postings, neighborhood fliers, and other electronic presentation and published presentation material. Without them, we would not have been as successful in updating and improving our public image."



CASE STUDY 2

2 – WATER AND WASTEWATER UTILITIES

CITY OF OCEANSIDE

CLIENT REFERENCE: Lindsay Leahy, P.E.

PHONE: 760-435-5913

EMAIL: lleahy@oceansideca.org

PROGRAM VALUE: \$75,000

PROJECT DATES: 2019 – Present

AMENDMENTS/CLAIMS: None

PROJECT BACKGROUND

The Water Utilities Department is responsible for the operation and maintenance of the City’s wastewater collection and treatment facilities. The Ardurra team provides communications and construction relations services to support the City’s efforts to provide reliable drinking water deliveries and to enhance wastewater flows and treatment to ensure a safe, reliable and efficient water and wastewater distribution system. The campaigns our team members have implemented include:

- Wastewater treatment facility tour program
- Renewable energy from food scraps and food-soiled materials
- Cogeneration facility fact sheet and groundbreaking event
- Correct disposal of fats, oil and grease (FOG)
- Water and sewer lateral responsibilities
- Sewer line cleaning, rehabilitation and replacement
- Advanced water purification project called Pure Water Oceanside
- Environmental compliance programs and BMPs
- Prop 218 rate increase notice

OUR STRATEGY

The Ardurra team uses a combination of traditional and cutting-edge outreach tactics to inform the city’s customers about the many services, programs, environmental stewardship efforts, and infrastructure projects the city spearheads. Our team created communications and engagement programs using strategic messaging, branding, marketing, and a variety of other communications tactics.



Construction News

Downtown Oceanside Water and Sewer Replacement Project

ABOUT THE CONSTRUCTION PROJECT

In early November 2017, the City of Oceanside Water Utilities Department will begin the Downtown Oceanside Water and Sewer Replacement Project in the harbor area (see map).

This project will replace important water and sewer lines, improve drinking water deliveries and enhance wastewater flow to ensure a safe, reliable and efficient water and wastewater distribution system.

PROJECT DETAILS

The harbor area portion of the project is expected to be complete by Dec. 2017/Jan. 2018. Work includes replacing water lines, sewer lines, water meters, hydrants and customer water service connections. To minimize impacts to the surrounding properties, temporary pipelines and pumps will be in place to allow for normal water delivery and sewer collection throughout the course of the construction.

CONSTRUCTION SCHEDULE AND WORK HOURS:

Fall 2016 - Winter 2018
Monday - Friday
7 a.m. to 4 p.m.

There will be times when temporary "no parking zones" will be needed during construction hours. Temporary "no parking" signs will be posted 48 hours before parking restrictions begin.


At the end of each pipe replacement section, there will be a temporary eight-hour water shut off to connect the new pipeline connections to the existing main pipeline. Residents and businesses will be informed of the shut off at least 48 hours in advance.



**City of Oceanside Water Utilities
LOMA ALTA CREEK EMERGENCY
SEWER REPLACEMENT PROJECT**

**CONSTRUCTION SCHEDULE:
May to December 2016**

**FOR INFORMATION: (760) 435-5833
www.OceansideUtilitiesProjects.com**





WaterSmart Meters

Bringing Smart Technology to Water Meters

The City of Oceanside is improving all water customer meters by installing new **WaterSmart** meters. This exciting modern technology is part of the City's continuing efforts to enhance customer service, conserve water, replace aging infrastructure, be more efficient and reduce the environmental impact of our operations.

The WaterSmart Meters Will:

- Provide** near real-time water use information
- Identify** unusual water use patterns such as leaks and breaks
- Streamline** staff time for efficient & enhanced customer service

Customers will have **24/7 ACCESS** to their water use readings

Currently water meters are manually read each month by the City of Oceanside to obtain customer water use data. The new **WaterSmart** meters will provide remote updates on an **hourly** basis allowing customers 24/7 access to this near real-time data. Customers can view and monitor water use, identify leaks and reduce overall water consumption.

WaterSmart Meters and Customer Portal BENEFITS

- Increases** water bill transparency to customers
- Saves** an estimated 55 million gallons each year
- Delivers** near real-time water use information to customers
- Provides** water leak alerts
- Encourages** efficient water use habits

LEARN More About the **WaterSmart** Customer Portal

www.Oceanside.WaterSmart.com

See other side for more information

Project Notification
Sewer Pipe Cleaning and Televising

The City of Oceanside is conducting city-wide sewer pipe cleaning and viewing pipe conditions by way of closed-circuit television (CCTV) camera.

This important 254 mile-long cleaning and CCTV effort is part of the City of Oceanside Water Utilities Department's efforts to enhance wastewater flow to ensure a safe, reliable and efficient wastewater distribution system.

WHAT WILL THE WORK INVOLVE?

Sewer access, cleaning and viewing is performed through sewer manholes. A large specialized truck that contains a vacuum, called a Vactor, cleans a segment of the sewer line. A second smaller truck will then access the manhole. There, workers will use a small camera to video the sewer pipe to ensure it's been properly cleaned to document potential problems in the pipe. The entire cleaning and televising process should take up to three hours for each manhole.

The cleaning and televising work will not include the sewer line lateral (the pipe that runs from the home or building to the sewer main which is typically located in the street). It is the property owners' responsibility to maintain and repair the lateral.

WHAT CAN YOU EXPECT?

It is common in the vacuuming process for toilets to bubble and cause minor splashing due to air pressure in the sewer line. If this occurs, a regular toilet cleaning in and around the toilet is all that will be needed when the work is complete.

Thank you for your patience during this important infrastructure maintenance project.

FOR MORE INFORMATION

The City is committed to keeping residents informed about the project. For more information, please visit www.OceansideUtilitiesProjects.com or call the project information line at (760) 435-5833. Calls will be returned within one business day.

WORK DAYS AND HOURS
Monday through Friday
7 a.m. to 4:30 p.m.

greenoceanside

UTILIZED TACTICS

- Social media graphics and content
- Strategic communications plans and tour plan
- PowerPoint presentations
- Logo and branding creation
- Fact sheets and FAQ development
- Webpage content writing
- Video production, including script writing
- Prepared template article for inclusion in City newsletter and local papers.
- Wrote and designed e-newsletters
- Media relations management, press release drafting and distribution
- Tour program planning and leading of tours
- Facility signage design and production
- Special event planning, promotion, implementation
- Construction notifications, door hangers and street signs
- Interactive map with project updates available 24/7

City of Oceanside Water Utilities
May 12, 2022

There's still time! You have until May 13th to complete the City's survey regarding sustainability goals and infrastructure improvements for zero waste and renewable energy. The survey can be found here: <https://bit.ly/3KGAtjv> and you will have the opportunity to win a Green Oceanside Kit!

#GreenOceanside #ZeroWaste #Sustainability #ClimateAction #OnePlanetTakeAction @CityOceanside

GREEN OCEANSIDE

We want to hear from you!

Please take our sustainability projects survey!

PROJECT RESULTS

Our communication campaigns inspired support and shifted broad perceptions while inspiring important stakeholder groups and strategic partners to champion city messages and programs.





3 – EAST COUNTY ADVANCED WATER PURIFICATION PROGRAM

PADRE DAM MUNICIPAL WATER DISTRICT

CLIENT REFERENCE: Melissa McChesney

PHONE: 619-258-4644

EMAIL: mmcchesney@padre.org

CONTRACT VALUE: \$1.5 million

PROJECT DATES: 2014 – Present

AMENDMENTS/CLAIMS: None

PROJECT BACKGROUND

This \$750M advanced water treatment program is under construction to create a new, local, sustainable and drought-proof drinking water supply to by purifying East County’s recycled water. Using advanced technology, the East County Advanced Water Purification Program will meet approximately 30 percent of east county’s current drinking water demands and reduce dependence on imported water. The Program is governed by the Joint Powers Authority (JPA) comprised of Padre Dam Municipal Water District, the City of El Cajon, County of San Diego and Helix Water District. Learn more about the Program at www.EastCountyAWP.com.

The Ardurra Community Relations team has worked on this program since its inception in 2014 (working as a group under two prior consulting firms). Ardurra is currently contracted to conduct community and construction relations with this client through the end of construction in 2025. We recently created a memorable June 2022 groundbreaking with community leaders to celebrate the start of this historic project.

OUR STRATEGY

Since 2014, Rebecca Cole, Rachel Kulis, Gabriela Dow, Susan Duffett and others from our community relations team have created a multi-pronged, comprehensive approach to inform water customers, local leaders and regional communities about the East County AWP.

We spent years working to implement strategic tactics to raise awareness and educate audiences about the purpose, need and benefits of the project, change public attitudes about recycled advanced purified water, and inform and mitigate impacts from construction which includes an 11-mile pipeline and advanced water purification facility.



The tour program was strategically planned and carefully implemented by our team. We developed a comprehensive tour plan that included results from customer surveys as well as field visits of the facility with project team members from operations to engineers. In the plan we identified key messages, visuals, run of show, tour promotion tactics and speakers as well as speaking remarks that address a range of diverse stakeholder groups. For instance, we worked to identify appropriate technical tour leads to address industry groups such as WateReuse or APWA and also individuals who resonated with younger student groups. We drafted suggested speaking remarks for each speaker for each tour stop. Eye-catching, graphically striking signs for the welcome room and treatment facility were designed, tailored PowerPoint presentations for different stakeholder types were created, a background video and shorter animated video were produced and collateral materials and interactive activities were prepared. Notepads, pens, bookmarks, watergami (cootie catchers) pencils, erasers and stuffed animal water drop plushies were popular with guests to take home.

Our staff led public tours became highly popular with schools and scout groups. To respond to the high demand from Girl Scouts of America, we hosted three Girl Scout Days that attracted 150-200 scouts per event. We leveraged this opportunity to educate the next generation to inform parents and guardians with a take home flyer. In the pandemic, we pivoted to virtual reality (VR) tours which included a slide presentation, a 360-degree virtual reality video and live tours with Q&A.



UTILIZED TACTICS

- Developed a communication plan outlining public outreach goals and tactics.
- Drafted a mail-in and web-based public opinion survey and findings summary.
- Created a fresh, modern project logo and branding design.
- Prepared key project messages and talking points for presentations.
- Created project fact sheets, posters, signs, newsletter and other collateral pieces.
- Drafted webpage content and updated as needed.
- Planned and implemented comprehensive tour programs and created online tour reservations.
- Designed the demonstration facility visitor center with eye-pleasing and informative displays.
- Developed interactive activities, including 'selfie station' to share tour photos, engaging origami games for kids and filter squeeze bottle activities that mimic membrane filtration.
- Managed elected official briefings and speakers bureau opportunities.
- Planned and oversaw award-winning groundbreaking and ribbon cutting events for the demonstration facility.
- Planned and staffed the Water Festival community event that was attended by 400-plus water customers.
- Developed and distributed news releases, pitched stories and obtained favorable media coverage in local, industry and international press and broadcast outlets.
- Managed production of four videos, including drafting the script, managing logistics and rehearsing with spokespersons.
- Coordinated construction outreach as needed for each package. Met regularly with contractors, park staff and partners to assure community outreach was on track.

PROJECT RESULTS

More than 7,000 people toured the facility while the tour program was underway. Quantitative survey results from the tour program showed the Program's understanding rate soared to 98 percent. The program exceeded the 30 percent goal to increase in public acceptance while providing program purpose, need and benefits information and establishing a better understanding of why the Advanced Water Purification Program is essential for East San Diego County. Extensive media coverage was obtained for the program including local print and broadcast as well as wide-ranging trade media reporting. On average, each major media relations effort obtained fourteen positive, in-depth media placements, garnering approximately 4.6 million impressions.

The East County AWP's tour and education program has been awarded countless honors. In total, this program has secured more than 20 industry awards.

AWARD HIGHLIGHTS

- California WaterReuse Association
Excellence in Public Information & Communication, Community Outreach of the Year, Recycled Water Agency of the Year
- California Association of Public Information Officials (CAPIO)
Three video, three special events, a graphic design and writing awards.
- The Public Relations Society of America San Diego/Imperial County Chapter
Three video, three special events, one creative tactics, one editorial/op-ed column and one best in show (for the Water Festival event).
- Water Reliability Coalition
WaterReuse Agency of the Year

Provides CLEAN, SAFE, high quality drinking water SOURCE	Protects CUSTOMERS' Water & Wastewater rates by being COMPETITIVE with Imported Water & Treatment	Creates NEW, LOCAL, sustainable & drought proof DRINKING WATER SUPPLY
Reduces THE REGION'S dependence on imported WATER	East County Advanced Water Purification www.EastCountyAWP.com	Supplies Up to 30% of East County's Drinking Water DEMAND <small>(more than 13 million gallons/day)</small>
Sustains & SAFEGUARDS the region's ECONOMY & way of life	Eliminates 15 MILLION gallons/day of wastewater discharge into the Pacific Ocean	Helps SENSITIVE ecosystems and helps the ENVIRONMENT



Please see below Ardurra's licensed in the State of California.

STATE OF CALIFORNIA

GAVIN NEWSOM, GOVERNOR



BOARD FOR PROFESSIONAL ENGINEERS, LAND SURVEYORS, AND GEOLOGISTS

2535 Capitol Oaks Drive, Suite 300, Sacramento, California, 95833-2944

Telephone: (916) 999-3600 – Toll Free: 1-866-780-5370

Facsimile: (916) 263-2246

www.bpelsg.ca.gov



ORGANIZATION RECORD FORM

Businesses whose Principal Office is located Outside of California

(Required pursuant to Sections 6738 and 8729 of the California Business and Professions Code)

Principal Office

Business Name Ardurra Group, Inc.				
Address	Street Address	City	State	Zip Code
4921 Memorial Highway, Suite 300		Tampa	Florida	33634
Telephone Number 813-880-8881		Website Address www.ardurra.com		

Type of Business

Corporation Partnership/Limited Liability Partnership (LLP) Sole Proprietorship

Business Legally authorized to Practice in:

Florida
State

12 19 1977
Month Date Year

Florida Board of Professional Engineers

Certificate of Authorization or License Number issued (if applicable)

Professional Services:

Civil Engineering Electrical Engineering

Mechanical Engineering Land Surveying

Other Branch of Engineering _____

List the name of the owner (sole proprietorship), the names and titles of **ALL** corporate officers (corporation), or the names of **ALL** partners (partnership or LLP). Include the license number and state of license issuance of all licensees. If you have a branch office in California, the person in charge of the branch office must be either a corporate officer (corporation) or partner (partnership or LLP). At least one of the officers or partners must be licensed in California in each area branch of engineering or land surveying being provided at the branch office. **(Attach additional pages if needed)**

Name	Title	License Number
Please see the attached Officers List		

List the names of the licensed engineers or land surveyors who are in responsible charge of professional engineering or land surveying services being provided in California: **(Attach additional pages if needed)**

Name	Discipline/Branch	License Number
Lisa M. Penna	Engineering/Responsible Charge for all branch locations	CA #59166

Note: This page must be signed by one of the owners or corporate officers of the business (need not be licensed in California).

I declare under penalty of perjury that the information contained in this record is true and correct to the best of my knowledge and belief.

06/16/2022 *Lisa M. Penna* CA#59166
Date Signature License Number



Branch Office for Out of State Businesses

(Pursuant to Sections 6738 and 8729 of the California Business and Professions Code)

Branch Address and Telephone number

Please see the attached Branch Office Location List

Professional Services Offered at Branch:

- Civil Engineering Electrical Engineering Mechanical Engineering
- Land Surveying Other Branch of Engineering _____

List the names of the California licensed engineers or land surveyors in responsible charge of professional engineering or land surveying services at this branch office. The law requires that at least one California licensee in each branch of engineering or land surveying being offered must be the owner (sole proprietor), a corporate officer (corporation), or a partner (partnership or LLP) of the company, must be present at the branch office on a regular basis, and must be in charge of the branch office. (Attach additional pages if needed)

I declare under penalty of perjury that the information contained in this record is true and correct to the best of my knowledge and belief.

Printed/Typed Name	License Number	Signature	Date
--------------------	----------------	-----------	------

I declare under penalty of perjury that the information contained in this record is true and correct to the best of my knowledge and belief.

Printed/Typed Name	License Number	Signature	Date
--------------------	----------------	-----------	------

Branch Address and Telephone Number

Professional Services:

- Civil Engineering Electrical Engineering Mechanical Engineering
- Land Surveying Other Branch of Engineering _____

List the names of the California licensed engineers or land surveyors in responsible charge of professional engineering or land surveying services at this branch office. The law requires that at least one California licensee in each branch of engineering or land surveying being offered must be the owner (sole proprietor), a corporate officer (corporation), or a partner (partnership or LLP) of the company, must be present at the branch office on a regular basis, and must be in charge of the branch office. (Attach additional pages if needed)

I declare under penalty of perjury that the information contained in this record is true and correct to the best of my knowledge and belief.

Printed/Typed Name	License Number	Signature	Date
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I declare under penalty of perjury that the information contained in this record is true and correct to the best of my knowledge and belief.

Printed/Typed Name	License Number	Signature	Date
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CALIFORNIA BOARD OF PROFESSIONAL ENGINEERS, LAND SURVEYORS & GEOLOGISTS
ORGANIZATION RECORD FORM – SUPPLEMENTAL INFORMATION

BUSINESS NAME: ARDURRA GROUP, INC.

PRINCIPAL OFFICE LOCATION: 4921 Memorial Highway, Suite 300, Tampa, FL 33634

CORPORATE OFFICERS:

NAME	TITLE	LICENSE TYPE	LICENSE #	STATE
Ernesto Aguilar	CEO & President	PE	71556	CA
Catherine Cahill	CFO, Secretary & Treasurer	N/A		
Donald Stouten	Vice President	LS	LS3839	FL
Carmen Kasner	Vice President	PE	50856	CA
Lisa M. Penna	Vice President	PE	59166	CA
Kenneth Scott Smith	Vice President	LA	LA6667187	FL
Alexandra Smith	Asst Vice President	N/A		

RESPONSIBLE CHARGE FOR ENGINEERING FOR ALL BRANCH LOCATIONS IN CALIFORNIA:

LISA M. PENNA, PE# C59166

BRANCH OFFICE LOCATIONS:

9100 Ming Avenue, Suite 202, Bakersfield, CA 93311

NAME	LICENSE TYPE	LICENSE #
Dolores Salgado	PE	C67536



1960 East Grand Avenue, Suite 300, El Segundo, CA 90245

NAME	LICENSE TYPE	LICENSE #
Lisette Bice	PE	C83157
Dino D'Emilia	PE	C55453
Oscar Gonzalez	PE	C66241
Arash Rostamian	PE	C91561
Joseph Stoakley	PE	C83184
Earl Schwartz	PE	C64411

3737 Birch Street, Suite 250, Newport Beach, CA 92660

NAME	LICENSE TYPE	LICENSE #
Stephan Badum	PE	C36106
Joe Buckner	PE LS	C45531 LS7206
Eli Farah	PE	C90120
Brad Fowler	PE	C29168
Jim Garvin	LS	LS6343
Jose Hernandez	PE	C68384
Miguel Hurtado	PE	C88091
Dennis Jue	PE	C36672
Theresa Kelley	PE	C39532
Mark Lewis	PE	C49335
Robert Merrell	PE	C28100
Andrea Mosqueda	PE	C93376
Lisa M. Penna	PE	C59166
Kenneth Rosenfield	PE	C033496
Anissa Voyiatzes	PE	C57710

440 S. Yosemite Avenue, Suite A, Oakdale, CA 95361

NAME	LICENSE TYPE	LICENSE #
William Kull	PE LS	C34935 LS5792
Kevin Cole	LS	LS8853
Nicholas Prichard	PE	C76538
Jacob Harvey	PE	C86630



301 Mission Avenue, Suite 202, Oceanside, CA 92054

NAME	LICENSE TYPE	LICENSE #
Richard Howard Kennedy	PE	M18710

14271 Danielson Street, Poway, CA 92064

NAME	LICENSE TYPE	LICENSE #
Anders Egense	PE	C40654
Jamie Fagnant	PE	C78967
Aric Gnesa	PE	C68339
Patrick Mulvey	PE	C069189
Robert Weber	PE	C059312

2515 Venture Oaks Way, Suite 120, Sacramento, CA 95833

NAME	LICENSE TYPE	LICENSE #
Bradley Waldrop	PE	C59724

1735 North First Street, Suite 304, San Jose, CA 95112

NAME	LICENSE TYPE	LICENSE #
Kaitlyn Leong	PE	C89478
Shyamala Raveendran	PE	C72074

43410 Business Park Drive, Temecula, CA 92590

NAME	LICENSE TYPE	LICENSE #
Amy Czajkowski	PE	C59082
Ryan Houston	PE	C60324



Please find below client references from city and special district governments for whom our team has previously performed similar services over the past 5 years. All of these long-time clients continue to entrust our team with their Public Relations, Community Outreach, Social Media and Communications needs.

REFERENCE #1	
NAME OF FIRM	Padre Dam Municipal Water District
ADDRESS	9300 Fanita Pkwy. - Santee, CA 92071
CONTACT	Melissa McChesney, Communications Manager
TELEPHONE #	(619) 258-4644
E-MAIL ADDRESS	mmcchesney@padre.org

REFERENCE #2	
NAME OF FIRM	City of Oceanside
ADDRESS	300 North Coast Hwy - Oceanside, CA 92054
CONTACT	Lindsay Leahy, P.E.
TELEPHONE #	(760) 435-5913
E-MAIL ADDRESS	lleahy@oceansideca.org

REFERENCE #3	
NAME OF FIRM	Ross Valley Sanitary District (RVSD)
ADDRESS	2960 Kerner Blvd. - San Rafael, CA 94901
CONTACT	Felicia Newhouse, Assistant GM
TELEPHONE #	(415) 259-2949
E-MAIL ADDRESS	fnewhouse@rvsd.org

REFERENCE #4	
NAME OF FIRM	City of Chula Vista
ADDRESS	276 Fourth Avenue - Chula Vista, CA 91910
CONTACT	Adrianna Hernandez, Special Projects & Legislative Manager City Manager's Office
TELEPHONE #	(619) 691-5254
E-MAIL ADDRESS	ADHernandez@chulavistaca.gov

REFERENCE #5	
NAME OF FIRM	City of Carlsbad
ADDRESS	1635 Faraday Ave. - Carlsbad, CA 92008
CONTACT	Kristina Ray, Communication and Engagement Director
TELEPHONE #	(760) 434-2957
E-MAIL ADDRESS	kristina.ray@carlsbadca.gov



The Proposer shall identify functions that are likely to be subcontracted and identify the subcontractor that is anticipated to perform each function, if known at this time.

SUBCONTRACTOR #1	
NAME OF FIRM	Hoch Consulting
ADDRESS	804 Pier View Way, Suite 100 Oceanside, CA 92054
TELEPHONE #	(858) 431-9767
E-MAIL ADDRESS	ahoch@hochconsulting.com
WEBSITE	www.hochconsulting.com



Hoch Consulting is a civil engineering and water resources firm headquartered in Oceanside, California. The firm is focused on providing clients with high-quality, cost-effective, and practical engineering, management, and funding solutions. Founded in 2012, Hoch’s guiding principles are to provide technical expertise, creativity, accountability, integrity, and efficiency in everything they do. As a local small business, the Hoch team offers a wide range of customized technical and support services to their clients in the water, wastewater, recycled water, and stormwater sectors. Founded and led by former public utility managers, Hoch offers a deep understanding of public agency needs and takes an owner’s perspective with every assignment. This has earned Hoch a reputation for being a valuable teaming partner and providing exceptional customer service.

The Ardurra team worked with Cari Dale and Sarah Davis, now at Hoch, to implement several large community-facing events with the City of Oceanside. One of the most significant was “Oceanside’s World of Water Day” celebrated on World Water Day to raise awareness about the importance of water and to launch the City’s new indirect potable reuse project, Pure Water Oceanside. Over 500 customers attended, where they traveled through several activities and toured the water recycling facility to learn the ways the City of Oceanside works to provide its customers with water and wastewater services.

The project team included our proposed Project Manager and Assistant Project Manager, Rebecca Cole and Rachel Kulis, who have extensive, integrated experience with these public agency Hoch experts. Together they all developed interactive and informative activities for all ages including testing water pH, learning how to read a meter, exploring recycled water pipes, watching a tractor truck at work, and more. And together, again, they will deliver the same results for VSD and your community.

As customers traveled through each station, they had a “Water Passport” created by Ardurra, that once completed entered them into a raffle. The public that attended the event enjoyed it so much that the event turned into an annual occurrence. This project team has extensive experience working together to develop interactive and engaging large scale events.

With the opportunity to work for Valley Sanitation District, the project team would bring the same level of commitment and effort. Creating an opportunity for the public to truly understand the value and level of commitment VSD brings to the community.



1. ACCOUNT MANAGEMENT

As Alexander Graham Bell said, “Before anything else, preparation is the key to success.” Our communication experts will prepare for success with you by planning a **kickoff meeting followed by monthly strategy discussions**. The goal of the initial meeting will be to understand your objectives and expectations, obtain foundational insights/historical information and offer strategies to reach and exceed your goals. We will also include a discussion about the District video so our team can get started preparing the video script that same week.

After our kickoff meeting, as a part of our effort in Task 3, we will prepare a **communications** plan to guide our year-long efforts. The communications plan will include:

- Goals
- Key Messages
- Stakeholders and Target Audiences (including customers, internal staff, elected officials, media, industry colleagues, community groups and more)
- Outreach Activities/Tactics (including materials, social media, website, video, media relations and more)
- Evaluation Methods

Subsequent monthly meetings will include sharing Ardurra’s **strategic planning and concept development** ideas with your team and collaborating to improve upon ideas to achieve your goals. The communication plan will be regularly updated to reflect innovative ideas and plans.

In accordance with the Scope of Work listed in the RFP, our comprehensive public relations team will seamlessly integrate the Account Management tasks with our strategic communication strategies. Our approach to Account Management aligns perfectly with the VSD’s needs, fostering strong communication and collaboration throughout the partnership.



1. Monthly Strategy Discussions: We will actively participate in monthly strategy discussions through phone or tele/videoconference meetings with designated District contact(s). This proactive approach will ensure that our efforts remain aligned with your objectives and enable us to swiftly adapt to any evolving needs.

2. Media Monitoring: Our team will diligently monitor local and regional and industry publications, as well as online alerts, to stay attuned to Valley Sanitary District stories. This enables us to respond promptly, capitalize on positive coverage, and address any potential concerns.

3. Translation Services: Recognizing the diversity of your audience, we are well-prepared with in-house native Spanish speakers and certified translation subcontractors to provide translation services for targeted communication pieces, including those in Spanish and other languages, ensuring your messages reach all segments of your community.



4. Communication Calendar: Our expertise in communication planning allows us to develop and manage a comprehensive 12-month calendar for District communications. This calendar will outline the strategic execution plan for disseminating messages across various platforms, ensuring consistent engagement.

5. Strategic Media Relations: We will implement and maintain the strategic communication plan which will detail media relations services for VSD. Our approach will keep the public and key stakeholders well-informed while engaging them on key District, wastewater, and project/program matters.

6. Enhancing Image and Messaging: Drawing from our experience, we will provide insightful recommendations and strategies to elevate the District’s image, messaging, and brand identity. Our goal is to establish a distinct and impactful presence that resonates with your audience. Just as we created a campaign that elevated awareness and positive perceptions for the City of Chula Vista, created understanding for water reuse with countless communities and helped RVSD achieve praise from their local editorial board, we know that consistent messaging with engaging presentation enhances and positively elevates an agency’s image. We will create materials that simplify complex wastewater issues to build trust and support for the crucial services, programs and infrastructure that VSD delivers.

7. Crisis Communication: We are experienced with members of our team that bring more than 30 years of experience and have worked for news outlets as reporters/assignment desk editors. We are prepared to offer timely and effective crisis communication counsel should the need arise, ensuring that the District navigates challenging situations with transparency and confidence.

8. Creative Development: Our team will be responsible for conceiving creative concepts, including quality graphic design, that visually capture the essence of your messages and campaigns.

9. Copywriting and Editing: We will develop original copy, providing copywriting and editing services for all communication materials. Our proficiency extends to creating content in Spanish and other languages to maximize inclusivity.

2. COMMUNITY OUTREACH

The Ardurra team will implement a robust public relations campaign by leveraging engaging a variety of tactics to:

- 1. Inform and educate.**
- 2. Build awareness, trust, support and confidence.**
- 3. Inform and engage all stakeholders.**
- 4. Convey key messages, clearly, accurately and creatively.**

We will put our electronic newsletter experts to work, starting with setting up a Constant Contact account for the District. Constant Contact will provide many promotional benefits for the VSD that will help seamlessly build your email list, engage with your customers and grow your online presence. We would also use Constant Contact to distribute event invitations, take RSVPs, integrate your social media accounts and conduct surveys. We would be happy to provide a training to your staff to learn how to use the platform.

Our skilled copy writers work to draft and design e-newsletters. The newsletter content would include educational information, milestone updates, services, event news (i.e., public meeting, tours etc.), projects and topical stories.

To effectively gather and distribute news about the District, a strategic approach involving collaboration with district partners and influencers is crucial. We will begin by identifying and fostering relationships with district partners, local organizations, community leaders, and influencers who are actively involved and respected within the community. These individuals and groups can contribute valuable insights and news-worthy updates. We will then set up communication channels to engage with partners and influencers and encourage them to share updates, events, success stories, and relevant information about the VSD. We will plan the distribution of the content across different channels, including social media, the e-newsletter and website. This approach will strengthen the District’s community engagement and build trust in your messaging.



We intend to employ a range of strategies, in alignment with the approaches outlined in your RFP to develop news releases, media advisories, articles, website content, and fact sheet for District events, initiatives, projects, and services. This entails utilizing tools such as newsletters, discussed above, press releases, collateral materials, social media content and website content. These techniques will be effectively orchestrated to spotlight District events, initiatives, projects, and services, ensuring widespread visibility and engagement. We will use our proven expertise to draft a wide variety of publications, media relations for VSD that include well-written copy, graphic design/branding and as appropriate, eye-catching photos, clear graphics and infographics. Our efforts will secure high quality, positive media coverage via earned media and educational feature news stories.

We will implement robust community outreach by leveraging engaging graphic design/content we create and media relations to foster public engagement with District’s ongoing activities and objectives. We will utilize multiple channels, interactive events and influencer partnerships and more for effective dissemination.

At every strategic step, our team strives to infuse creativity, uniqueness and when appropriate, fun, to make each campaign tactic memorable. We know wastewater and are eager to learn more about VSD’s existing and upcoming services, projects and efforts! The key to our success will be to have a deep knowledge of VSD and be closely attuned to the community so we can identify potential opportunities and challenges and provide strategic communications guidance to the team.

3. PUBLIC RELATIONS

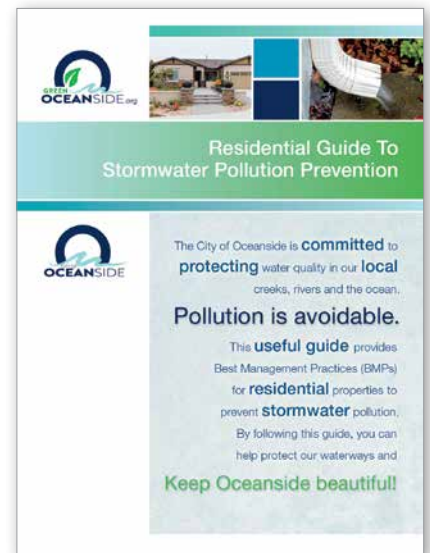
The primary goal of our public relations methodology is to establish and maintain a positive image, foster goodwill, and facilitate effective communication using a variety of activities and strategies. Ardurra will use this task to create a tailored, comprehensive communication plan that will create a road map to accomplish your goals, including raising awareness, improving perceptions, creating District champions, educating customers, changing behaviors (if desired) and communicating with internal audiences.

The communication plan will include the following, as identified in the RFP:

Messaging: Key message points will be developed for a variety of topics and projects, as well as countering misinformation and misconceptions to refer to when preparing collateral materials, social media, media relations efforts, video scripts and other communication efforts.

Strategies: The strategies we will identify will be crucial for communications success. They will provide a structured and purposeful approach to conveying messages, define clear objectives, identify target audiences, and select the most effective channels and messaging tone. The strategies will be well-defined, assuring that the District’s communication efforts about existing and upcoming programs and initiatives are focused, coherent and aligned with overarching goals to achieve success.

Collateral Materials, Website and Graphics: Collateral materials, website content and graphics will play a pivotal role in effective communication and promotion efforts. These visual elements serve to enhance the presentation and comprehension of information by making it more engaging and memorable





for your customers and other stakeholders. These materials and website sources will be planned and implemented to convey key messages, highlight VSD's services and leave a lasting impression.

Social Media: To reinforce established District messaging and expand on existing community engagement efforts, we will prepare consistent, creative and responsive social media campaigns and track their effectiveness to fine tune the efforts over time. Our approach will ensure a consistent and engaging online presence that resonates with the community. The result will increase awareness of VSD services and brand, advance your image, and create lasting trust and relationships with the community and your customers. See Task 4 for more detailed methodology on our proposed social media efforts.

Emails and Newsletters: The plan will include electronic communications, e-newsletters and onboarding emails to be educational and provide information and updates on District milestones, services, projects events (such as public meetings and tours).

As positive news is gathered, a regular e-newsletter is a great way to share the constructive sentiment. This can help to create community trust to reach the sentiment described in our cover letter of appreciation. In the example of the Marin IJ editorial of what we can help achieve for your agency, our communications efforts paired with RVSD's technical work and commitment to service, led this community institution to publicly and very visibly explain, "Of course, local ratepayers saw an increase in their bills and construction crews at work. But that work, overhauling sewage pump stations and underground pipes, doesn't attract a lot of attention, unless they aren't working the way they should."

"The lesson learned is this out-of-sight network of pipes and pumps has to be maintained and repaired. There is an 'out of sight, out of mind' attitude toward sewers, but local leaders committed to keeping them in good repair deserve credit." Quotes like this shared throughout multiple platforms will aid in creating awareness and increasing positive perceptions.

Media Relations and Tracking: Our proposed methodology is designed to align with the Valley Sanitary District's objectives, enhancing communication and fostering strong community engagement. Our strategies aim to effectively share positive narratives, promote events, drive interaction, combat misinformation, and track media efforts, all while maintaining a data-driven approach for continual improvement.

We will diligently track stories, events, and potential crises in the media that could benefit from a District response. Our timely engagement will ensure that the District's perspective is effectively communicated to the public.

Public Awareness Strategies for Events and Services: Our team will develop targeted public relations strategies to elevate public and community awareness of the District's upcoming events. By crafting compelling messaging, we aim to maximize attendance and participation in these events.



Raising Awareness of District Matters: Our expertise extends to developing public relations strategies that increase public and community awareness of the District's key matters. By employing effective communication techniques, we will ensure that vital information reaches the intended audience.

Customer Onboarding and Engagement: We will refine and expand customer onboarding engagements via email messages, providing informative content about District services, meetings, and service options. This proactive approach aims to enhance customer understanding and engagement.



Counter-Misinformation Strategies: Our team will develop targeted strategies to address and counter misinformation and misconceptions. By addressing inaccuracies promptly and transparently, we will maintain a credible and trustworthy image for the District.

Community Outreach and Promotion of Initiatives: Our services encompass community outreach to facilitate public engagement related to ongoing District activities and objectives. Our team will analyze existing and upcoming District programs and initiatives, developing effective strategies for promoting these efforts within the community. This includes graphic design and media production, ensuring visually appealing and informative content. By highlighting the value of these programs, we aim to enhance community involvement and support.

Our data-driven approach will allow us to continually adapt and optimize our efforts, ensuring transparent communication and strong public engagement.

4. SOCIAL MEDIA

Social media offers the ability to interact with audiences and should be a key component of Valley Sanitary District’s communication program. We know how to use social media to build audiences and get the messages out. Our social media experts will draft creative social media content that best engages your audiences and quickly disseminates important, timely information.

We look forward to helping the District increase its reach and digital engagement by incorporating social media into the communications and message distribution to increase the number of “likes,” “follows” and the satisfying “shares” of District posts among community members. Our team is excited to lead a disciplined messaging and public outreach effort for the District that includes robust social media engagement to help achieve communication objectives.

Our team’s expertise in social media led to selection by the California Association of Public Information Officials (CAPIO) of our “THIS is Chula.” campaign for the City of Chula Vista as the EPIC award winner for a branding campaign for the state of California. The social media, earned media and sponsored posts component of this campaign achieved more than 20 million impressions in the first five months, delivering 23% more impressions than projected. The community embraced the campaign adding more positive impressions via their social media shares and engagement. The digital campaign delivered a .13% CTR with 2,451 clicks (over 2.5 times industry standard) and a .26% CTR for geofencing with 861 clicks (over five times industry average).

A post-campaign survey measured increased improvement on positive and neutral perceptions of Chula Vista and key issues related to the city. Specifically, the 2018 post-campaign survey conducted by LUTH research showed 415 county residents measured an increase to 45% (from 35%) reporting a positive perception of Chula Vista.

The campaign was extended with Instagram takeovers that further exceeded expectations. Our team secured and coordinated with Good Morning America and Food Network star Chef Marcela Valladolid whose takeover earned the Chula Vista Instagram account 1,800 new followers on the day of the takeover and achieved more than 40,000 engagements in just the first 24 hours. Another IG Takeover with celebrity BMX Racer Tyler Brown further showcased his home town through unique eyes with positive experiences. Brown’s campaign garnered more than 21,638 engagements – including views, impressions, likes, shares, comments and more – plus over 450 new followers for the City’s Instagram page. Together, with other platforms

We understand the importance of tailoring each social media graphic not just with branding, messaging and engaging graphics but also technical details like customized sizing, metadata and tags for each platform.





like Twitter and Facebook included, both IG Takeovers generated more than 70k positive engagements.

Our team further built upon the collaboration with Valladolid and Brown on behalf of the City to include featuring them in billboards that had been negotiated as bonus boards by our media buyer. The positive imagery was extended from digital to printed outdoor advertising at no added cost to the IG Takeover effort, and in fact the overall campaign was provided with fresh new imagery that now involved authentic brand adoption by well known local celebrities. All of this added to the more than 50 million total impressions earned by the "THIS is Chula." brand in the first year.

While the VSD social media campaign will be on a smaller scale, the level of creativity and leveraging of each penny spent will be equal to this award-winning effort.

5. MONTHLY REPORTS

To monitor and capture the progress of our efforts, we will prepare monthly activity summaries that record the accomplishment of our initiatives and the implementation of the community outreach plan. The report will list all our activities, including details relating to video development, e-newsletter, branding and collateral materials preparation, media relations efforts, special event planning and other campaign work. Our monthly summaries will also include a monthly activity plan – or "lookahead" – for the upcoming month to assist in planning purposes.

6. PUBLIC OUTREACH MUSEUM DISPLAY VIDEO PRESENTATION

Videos are an engaging and lasting way to tell a bright, vivid story in an interesting and upbeat style that communicates key messages and showcases the District's impressive services and accomplishments. Brief, engaging one to two-minute videos can help personalize key messages communicated in a new way.

We have created a variety of award-winning videos, including traditional 5-10-minute-long videos, animated videos, 360-degree videos and specialized short videos, tailored for social media.

Due to the urgency of your video need, our team will hit the ground running and meet with key District staff and leaders to fine tune messaging and script for videos. We will then work with our creative and disciplined videographer to deliver an educational award-winning video for viewing at the Coachella Valley History Museum to compliment the District's exhibit, explaining the history wastewater in the Coachella Valley.



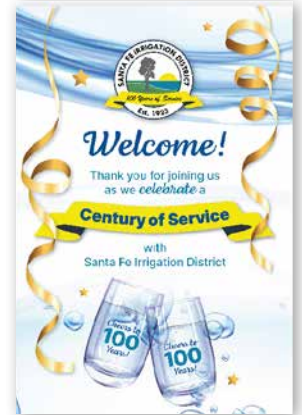
We recommend creating several shorter, bite-sized videos from the longer, museum version, which work better on social media. These would be strategically planned during the development and script-writing phase to be cost effective and impactful. The videos will be prepared to be distributed and shown through multiple media platforms (mobile, social media, website, internally, etc.). We will shoot new footage, as well as develop interesting animation to convey your story in a new, fresh approach that engages the community, wows industry colleagues and wins awards.



7. CENTENNIAL CELEBRATION DEVELOPMENT AND PLANNING

Ardurra puts the “special” in special events. We have planned and executed hundreds of special events of all size and scale. The passion, organization and creativity we bring to each event are unmatched when it comes to special event planning. Our team can plan and implement everything: invitations, event promotion, script writing, agenda/logistics, rentals, mementos and more.

Most recently we planned a 100-Year Celebration event for the Santa Fe Irrigation District which featured a 5-foot high “100” sign with a photo collage featuring photos representing the services the agency has provided the community throughout the years. Some other notable events include the Pure Water Oceanside groundbreaking and ribbon cuttings well as the Olivenhain Dam and Reservoir groundbreaking and dedication for the San Diego Water Authority. We also planned and implemented a Water Festival community-wide open house event at the East County Advanced Water Purification Facility as well as a meet and greet for local elected officials and their staff to attend and learn about upcoming program initiatives. All of these events won awards from PRSA and the California Association of Public Information Officers.



We are prepared to plan and implement your Centennial event in any size or scale envisioned. We will use this opportunity to elevate the District’s services and programs and create a memorable experience reaping long-lasting advantages. The event will be planned to create hooks for media, inform your customers/stakeholders, elected officials and targeted audiences to help nurture, foster relationships, and create District champions. Your event will be tailored to meet and exceed event goals and be fiscally responsible with ratepayer funds. If selected, we look forward to planning a unique and memorable event for the Valley Sanitation District.





Our four-step RPIE methodology, developed by the Public Relations Society of America (PRSA), will be applied to this effort, as with all successful public relations programs that we deliver: Research, Planning, Implementation and Evaluation. As discussed, Ardurra will prepare and execute a tailored communications plan to focus on identifying key messages through education and information and identifying tactics to build District awareness, trust and support. The plan will include trackable, measurable milestones and a schedule for accomplishing the tasks to achieve all program and project goals. We will prepare an additional plan devoted to your special event as well.

**STEP
1**

RESEARCH

We review existing research and conduct an audit on existing media/messaging to prepare an overview for your team in order to develop an effective advertising and awareness plan. We are experts at conducting research to identify the most cost-effective platforms (including digital, print, social media, retail outlets, and potential amplification partners) to convey messages via branded materials. Our research leads to sound recommendations that include cost-effective strategies for incorporating campaign-related visuals into existing/new collateral.

**STEP
2**

PLANNING

Information gathered is distilled into a tailored strategic plan with recommended tactics that apply consistent messaging and visuals distributed via impactful, efficient and cost-effective communication channels for maximum effect. We will plan according to key milestones and the needs of identified target audiences. The strategic plan will include and identify awareness/perception communication goals, key messages for target audience, outreach activities and creative tactics to enhance the overall campaign.

**STEP
3**

IMPLEMENTATION

Implementation of messaging through the strategic plan will be well organized, leveraging completed work in multiple formats for maximum effect and cost-effective roll-out. We will negotiate rates with selected media outlets and manage media contracts, as well as reconcile invoices and verify placement with detailed monthly reports that include a look-ahead. We will also assure our implementation is clearly coordinated with the VSD project manager as we include recommended public relations and earned media efforts.

**STEP
4**

EVALUATION

Regular evaluation will be key for success in branding and messaging. Our measurements track quantitative and qualitative results. We use comprehensive databases and task lists updated in real-time in order to make the most of each advertisement, collateral piece and expression of awareness and shift in perception (through social media, earned media, stakeholder outreach and community analysis).



D | CERTIFICATION OF PROPOSAL

The undersigned hereby submits its proposal and, by doing so, agrees to furnish services to VSD in accordance with the Request for Proposal (RFP), and to be bound by the terms and conditions of the RFP.

Request For Proposal #2023-RFP-007

Title: Social Media and Public Relations Services

5. VENDOR QUESTIONNAIRE

5.1. Have you read and agreed to all Terms and Conditions?*

Yes

No

*Response required



APPENDIX



East County Advanced Water Purification August Newsletter

The Clear SOLUTION

East County Advanced Water Purification

After a year of construction, the East County AWP Program is closer than ever to providing a new drinking water supply for East County. Noticeable construction is occurring in Santee and Lakeside to build the pipelines and facilities for this important project. Over 3,200 linear feet of purified water pipeline have been installed to date. More updates on current specific updates are provided below.

Purified Water Pipeline Related Work

Santee Pipeline Work Moves East of Mast and Magnolia
 Pipeline construction near Mast Blvd. and Magnolia is moving east. Work at the intersection is complete just in time for the start of the school year for Santee High. The crew is now heading east from the Mast and Magnolia intersection.

Lakeside Pipeline Construction - El Monte Rd and Laurel Canyon Rd
 Crews have progressed outside the fence line of the Helix Water District yard and have started work on El Monte Rd. Traffic is reduced to one lane so please proceed slowly. Work will cross both lanes on El Monte Rd. and continue northwest toward Laurel Canyon Rd. before getting to Lake Jennings Park Rd.

When complete, the purified water pipeline will transport purified water from the East County Advanced Water Purification treatment facility to Lake Jennings. Construction involves extensive drilling in some areas, material excavation, pipe placement and lane closures. The work schedule is Monday through Friday, 7:30 a.m. to 3:30 p.m.

Wastewater Pipeline Related Work





REBECCA COLE

PROJECT MANAGER

Rebecca Cole has 26 years of communications experience. As director of communications at Ardurra, Rebecca manages public affairs and community relations programs for infrastructure improvement programs, and has developed and implemented award-winning public affairs programs for local governmental agencies that span Southern California. She specializes in public outreach for government agencies and cities with unique expertise in water including drinking, recycled, wastewater, Indirect Potable Reuse, emergency water storage, and especially water conservation for cities to navigate the changing landscape that is normal to our desert region. Rebecca's expertise includes a specialization in construction relations and environmental projects. She collaborates with elected officials, media representatives and civic groups throughout the San Diego region and on the statewide and national stage to achieve successful outcomes and important project milestones using a range of proven communication tactics. Rebecca has worked on controversial, high-profile projects in some of the most vocal and organized communities. Weaving a variety of proven traditional and contemporary communication strategies and techniques into her campaigns, her tactics consistently achieve successful results by initiating open dialogue, facilitating collaboration, and fostering credibility that turns ardent opponents into passionate supporters.

EDUCATION

San Diego State University
BA, English, 1990

AWARDS

2022 PRSA Bernays Silver Awards: Community Relations, Business: Pure Water Oceanside Puts Customers 1st During Construction—City of Oceanside; Events and Observances Less than Seven Days: Building Our Water Future – East County Advanced Water Purification (AWP) Groundbreaking—East County AWP Program; Videos: A Water Experiential Learning Experience Using a 360° Video—East County AWP Program; Media Relations, Press Conferences: East County AWP EPA \$388M Loan Press Conference—East County AWP Program; and Social/Digital Media: SANDAG, Caltrans, MTS “Bus on Shoulder” Digital Awareness—SANDAG, Caltrans, and MTS

2021 PRSA Bernays Best of Show Awards, Silver, Community Relations – Pure Water Oceanside, City of Oceanside; PRSA Bernays Best of Show Awards, Creative Tactics Excellence – Water Festival, East County AWP Program; PRSA Bernays, Bronze, Research/Evaluation Excellence – Pure Water Oceanside, City of Oceanside

PRSA National Bronze Anvil Commendation – Advanced Water Purification Video; PRSA Regional Chapter Bronze Bernays – Advanced Water Purification Video

Association of Marketing and Communication Professionals, Hermes Award – Advanced Water Purification Video

PROJECT EXPERIENCE

PURE WATER OCEANSIDE, CITY OF OCEANSIDE WATER UTILITIES DEPARTMENT (OCEANSIDE, CA)

Pure Water Oceanside will purify recycled water to create a new, local source of high-quality drinking water that is clean, safe, drought-proof and environmentally sound. The program will produce enough water to provide more than 30% of the city's water supply. Rebecca currently works with the city to communicate with residents and businesses about project construction, and to engage and educate Oceanside's customers about the project. To date Rebecca and her team have branded the program, created a fact sheet and drafted, designed and installed signs placed inside the visitors center to learn about the project. Currently Rebecca is overseeing a newly revised project video, helping secure support letters from local leaders and managing website updates. Most recently, Rebecca oversaw the project video and coordinated the city's first “World of Water Festival” that showcased the city's water utilities department and introduced Pure Water Oceanside to the 400 guests that attended.

ADVANCED WATER PURIFICATION (AWP) PROGRAM: PUBLIC RELATIONS AND OUTREACH, PADRE DAM MUNICIPAL WATER DISTRICT (SANTEE, CA)

Rebecca currently manages the public outreach team in its effort to build support for the East County AWP Project. Rebecca managed the project's successful and award winning groundbreaking and ribbon cutting events that highlighted the project's purpose and need, garnering extensive media coverage and elected official and community supporters. She also led media training and drafted key message points for the core team and board of directors to increase their effectiveness and comfort with media professionals. Rebecca currently oversees outreach to industry leaders, government officials and east county stakeholders through the strategic use of written information, community events and first-hand tours of the demonstration facility where nearly 7,000 have visited to learn about the project. Previously, Rebecca coordinated a community water festival where more than 400 east county residents and elected officials gathered to learn more about the project and taste water samples from the demonstration facility.



AWARDS (CONT.)

PRSA, Best Video – Olivenhain Dam & Reservoir; PRSA, Best Brochure – Olivenhain Dam & Reservoir

PRSA, Best Fact Sheet – Olivenhain Dam & Reservoir

AVENIDA ENCINAS SEWER IMPROVEMENT PROJECT, CITY OF CARLSBAD (CARLSBAD, CA) – Rebecca managed community relations for this large-scale construction project by the cities of Carlsbad and Vista to improve its shared sewer system along a busy thoroughfare in the City of Carlsbad. Improvements included sewer system upgrades and a new sewer pipeline, recycled water pipeline, 140-foot bridge over the Aqua Hedionda Lagoon and a new lift station. Rebecca managed outreach to the businesses that line the construction area and nearby residents affected by construction noise, road detours and construction traffic as well as complete road closures. Efforts included mailers to residents within the alignment, personal visits to more than 100 affected businesses, coordination with North County Transit District (NCTD) regarding road closures, email blasts, door hangers, website information and project information line management. During the heart of construction, Rebecca met weekly with the city team and contractor to strategize impacts and outreach to those along the busy and highly visible thoroughfare.

LAKE MURRAY TO SWEETWATER RESERVOIR PIPELINE 3 RELINING, SAN DIEGO COUNTY WATER AUTHORITY (SAN DIEGO, CA) – Rebecca provided strategic guidance for this important infrastructure project that rehabilitated more than four miles of drinking water pipelines. With 18 portals spanning 20 miles, from La Mesa to Sweetwater, outreach focused on neighborhoods near each portal as well as commuters, community leaders and businesses. Postcards, informational materials, social media, community briefings, one-on-one meetings and community events were tactics the team used to engage with cities and its stakeholders during this impactful project.

EMERGENCY STORAGE PROJECT, SAN DIEGO COUNTY WATER AUTHORITY (SAN DIEGO, CA) – For 10 years, Rebecca was the public affairs manager for the \$832 million Emergency Storage Project, which included a system of reservoirs, pipelines and pump stations to make water available to the San Diego region in the event of a natural disaster. Rebecca managed the public affairs for the project’s EIR-EIS, and construction relations for the construction of a new dam and reservoir, and underground and tunneled pipelines. She drafted communication plans and information materials, worked with impacted stakeholders, elected officials and media representatives, and planned the groundbreaking and dedication events. The project team was recognized by the Public Relations Society of America and received a number of awards, including the coveted Silver Anvil Award for Best Communication Program.

WATER CONSERVATION AND RATE INCREASE PUBLIC OUTREACH, CARLSBAD MUNICIPAL WATER DISTRICT (CARLSBAD, CA) – Rebecca was the project supervisor overseeing community relations for City of Carlsbad outreach efforts to support successful implementation of mandatory water use restrictions and approval of increased water rates and new water rate structure. To communicate important updates to customers, Rebecca managed production of information materials, website updates, media materials and bill inserts.

CITY OF OCEANSIDE WATER UTILITIES DEPARTMENT INFRASTRUCTURE COMMUNICATION, CITY OF OCEANSIDE (OCEANSIDE, CA) – The city is working steadily to improve its aged water infrastructure in neighborhoods throughout Oceanside and at the Oceanside Harbor. Rebecca has managed and currently oversees community relations services on a variety of pipeline and infrastructure projects that support the city’s infrastructure improvement projects. Projects have included water and sewer pipeline rehabilitation/replacement and reservoir rehabilitation projects in various dense neighborhoods.



GABRIELA DOW

STRATEGIC GUIDANCE

Gabriela is a communications specialist with 25 years of experience in public outreach, public affairs and media relations. Her career includes experience in the media (two CNN bureaus and KCBS News) as well as work with the City of San Diego water conservation and repurification programs and White House World Water Day innovation team. She has worked to grow San Diego-based e-Government tech startups and thus developed her unique ability to leverage technology as a tool to maximize outreach and manage results-driven programs. Gabriela’s experience with water conservation programs goes back to the 1990’s when she served as a community relations specialist in southern California, Texas and New Mexico. She continues to specialize in effective bilingual strategy and communications for sustainable water usage, and was honored as the “SDCWA Influencer of the Year” in 2018 by the San Diego County Water Authority. In January 2014, Gabriela was listed as one of nine “People to Watch in 2014” by the San Diego Union Tribune (SDUT) Business section and in March 2015, SDUT profiled Gabriela’s leadership in a feature article titled “Connecting Tech and Government.” A native of Guadalajara, Mexico, Gabriela is fluent in Spanish and offers true bicultural engagement for Latino/a communities.

EDUCATION

University of California, Los Angeles
B.A. English Literature and Communications, 1996

Universidad Complutense - Madrid, Spain
Journalism and International Relations

AWARDS

2022 PRSA Bernays Silver Awards: Community Relations, Business: Pure Water Oceanside Puts Customers 1st During Construction—City of Oceanside; Events and Observances Less than Seven Days: Building Our Water Future – East County AWP Groundbreaking—East County Advanced Water Purification Program; Videos: A Water Experiential Learning Experience Using a 360° Video—East County Advanced Water Purification Program; Media Relations, Press Conferences: East County AWP EPA \$388M Loan Press Conference—East County Advanced Water Purification Program; and Social/Digital Media: SANDAG, Caltrans, MTS “Bus on Shoulder” Digital Awareness—SANDAG, Caltrans, and MTS

2021 PRSA Bernays Silver Award – City of Carlsbad Sustainable Mobility Plan – Stakeholder Working Group as part of the team that secured a total of thirteen awards at the Edward L. Bernays Mark of Excellence

2019 PRSA (Public Relations Society of America) “Best of Show” award as part of the team that secured a total of seven awards at the Edward L. Bernays Mark of Excellence

2018 San Diego County Water Authority Influencer of the Year

2018 CAPIO EPIC Award for “THIS is Chula.” Association of Marketing and Comm. Professionals (AMCP)

PROJECT EXPERIENCE

COMMUNITY RELATIONS AND CONSTRUCTION OUTREACH FOR THE EAST COUNTY ADVANCED WATER PURIFICATION (AWP), EAST COUNTY AWP JPA, ADMINISTERED BY PADRE DAM MWD (SANTEE, CA) – Gabriela provides facilitation services and manages elected official outreach for the Padre Dam Advanced Water Purification (AWP) project and secured more than 15 letters of support and official proclamations from elected officials and regional leaders. She also prepared remarks for more than eight federal, statewide, regional and local speakers at the groundbreaking and grand opening of the AWP demonstration plant. Gabriela continues to manage government relations for this program, as well as provides guidance on media relations, social media, event management and public outreach services. Gabriela also conducts media training for Padre Dam and JPA members, conducts live TV news interviews at special events, and works with the team to help assure a cohesive and successful public engagement effort.

COMMUNICATIONS AND COMMUNITY RELATIONS FOR RVSD CIP PROGRAM, ROSS VALLEY SANITARY DISTRICT (SAN RAFAEL, CA)

– Gabriela serves as the Program Supervisor for ongoing communications and engagement services for Ross Valley Sanitary District, the oldest sanitary district in California, with more than 100 years providing wastewater collection services to communities in Marin County. Gabriela leads a team of community relations experts in developing the district’s communications and public outreach program to provide the District’s customers with valuable information, and increase confidence in the District while educating customers on wastewater services. Gabriela implemented an entirely new agency website and also oversees public outreach for the District’s extensive CIP program.

“LIFE IN ACTION” ECONOMIC DEVELOPMENT FAMILIARIZATION TOURS AND FACILITATION SERVICES, CITY OF CARLSBAD (CARLSBAD, CA)

– Gabriela utilized marketing to support economic development, business and real estate for the City of Carlsbad in support of the Economic Development Department and “Life in Action” program. Business outreach included highlighting programs and services utilizing multiple platforms for regional and national media, and for public and private sector targets in select industry verticals. The Ardurra team works to help assure citywide adherence to branding and utilizes advanced tools to evaluate and measure marketing outcomes that provide real-time, detailed



AWARDS (CONT.)

2018 HERMES Award for "THIS is Chula." Video production

2017 Videography Award for "Innovation Station" video

2017 Entrepreneur of the Year by Latina Style Magazine

PROFESSIONAL AFFILIATIONS

San Diego County Water Authority (SDCWA) Social Influencer Award, 2018

Habitat for Humanity, Board President and Vice President, 1999-2007

Barrio Logan College Institute (BLCI) mentor 1999-2001

Valley Elementary Education Foundation, Board Member, 2013-2016

San Diego Business Alliance for Water, 2015-2019

San Diego City College Industry Advisory Board, School of Business and Accounting, 2016-Present

Graduate of the San Diego County Water Authority "Citizen's Water Academy" 2017

Women Who Change the Game Host Committee Member, 2018

ENTREPRENEUR OF THE YEAR, Latina Style Magazine & Hispanic Chamber of e-Commerce 2018

Poway Unified School District Technology Advisory Committee, 2015 to 2016

analysis. For the City's Sustainable Mobility Plan (SMP), Gabriela worked with the city and community to identify the vision, policies and specific actions to facilitate implementation of the city's Mobility Element of the General Plan and the Climate Action Plan. She managed business surveys, internal messaging sessions, focus groups and field intercepts. She developed a strategic communication and public engagement plan and schedule; created a webpage; created a Stakeholder Working Group (SWG) with representatives from multiple key community and business sectors and conducted three SWG meetings to provide detailed presentations and gather extensive input. She also created SMP fact sheets, PPT and informational poster boards to utilize and hand out at community meetings, events and presentations. She coordinated one-on-one meetings with key stakeholders like the Carlsbad Unified School District (Superintendent and staff) as well as Viasat Sustainability team and developed an online MetroQuest community survey for more broad community engagement.

PURE WATER OCEANSIDE COMMUNICATIONS, CITY OF OCEANSIDE WATER UTILITIES DEPARTMENT (OCEANSIDE, CA)

– Gabriela helped to develop a communications plan for rebranding the utilities department and environmental programs, which extends into assisting with rebranding and logo development for the entire city. She managed the implementation of the GreenOceanside mobile app and Myers Tait mobile landing page to engage the public in a more modern and effective manner. She is also currently supporting the implementation of a comprehensive branding and outreach campaign to educate Oceanside's residents and businesses about Pure Water Oceanside – a developing project that will bring a new source of drinking water to the city. Gabriela leads government relations and bilingual engagement for the client and special events that include the educational event "World of Water" and the Pure Water Oceanside groundbreaking event in early 2020. She managed securing of an award from the White House for this innovative program that will produce enough water to provide more than 30% of the city's water supply by purifying recycled water to create a new, local source of high-quality drinking water that is clean, safe, drought-proof and environmentally sound. Gabriela also supports Oceanside results-focused water conservation campaign efforts that educate customers/water users about using water wisely, water restrictions, drought/climate change, incentive opportunities (rebates, grants), workshops/classes and water saving tips. She leads government partner engagement and bilingual development of fact sheets, videos, infographics, bill inserts, lobby signs, street banners, social media content, the Mayor's Challenge, wrapped vehicles, water fountain signs promoting tap water and more.

GOVERNMENT, MEDIA AND COMMUNITY RELATIONS, EL PASO WATER UTILITIES (EPWU) AND THE NEW MEXICO TEXAS WATER COMMISSION (EL PASO, TX AND LAS CRUCES, NM)

– Gabriela delivered strategic planning and execution of public awareness plan to address water resource challenges. She conducted stakeholder interviews and formed a public advisory panel, developed informational pieces, handled media relations and also executed a "State of the Water" event attended by regional officials.

COMMUNITY ENGAGEMENT, KELCO/MONSANTO COMMUNITY ADVISORY PANEL (BARRIO LOGAN, CA)

– Gabriela created a Community Advisory Panel (CAP) for Kelco/Monsanto in the Barrio Logan community, and she served as and worked as the facilitator with bilingual capabilities. CAP members included Hispanic leaders, environmental activists, business representatives and neighbors to this biogum and kelp processing plant. She also created and implemented a successful Open House for the plant to take its first step in engaging the community at an event hosted onsite. As one of the largest and most visible consumers of water in San Diego at the time, information about sustainability and responsible water use was a key component.



RACHEL KULIS

ASSISTANT PROJECT MANAGER

Rachel has managed the successful Landscapes for Living EMWD program and provides public affairs and community relations services throughout California. She has 24 years of communication experience, specializing in the planning and implementation of award-winning public involvement, community outreach and marketing programs for government agencies and not-for-profits.

Rachel has a deep knowledge of water and wastewater topics. She specializes at writing visually appealing and easy to understand materials, event and tour planning, overseeing graphic design efforts and spearheading media relations campaigns. She has dedicated most of her career to planning and implementing public affairs and community relations programs for water, wastewater, environmental, construction and transportation projects.

EDUCATION

University of Arizona
B.A., Political Science, 1991
George Washington University
Public Relations Certification, 1996

AWARDS

PRSA Bronze Anvil PRSA Bronze Bernays & CAPIO Epic Awards for "Water Too Good to Waste" Video
PRSA Bernays - Best in Show Award for Creative Tactics Water Purification Program
PRSA Silver Bernays and CAPIO Events Awards for San Diego County Water Authority Emergency Story Project, City of Oceanside World of Water Festival, Pure Water Oceanside groundbreaking and dedication, East County AWP Water Festival, and "Beer Starts With Water," groundbreaking, tour program and Girl Scout Day.
PRSA Bernays Research and Evaluation Award for Pure Water Oceanside Survey
PRSA Bernays and CAPIO Video Awards for "Water is a Big Deal" and Pure Water Oceanside and East County AWP 360-Degree VR videos
Best Marketing Program Hermes Creative Award
Public Education Program of the Year (two awards) WaterReuse Association

PROFESSIONAL AFFILIATIONS

Public Relations Society of America

PROJECT EXPERIENCE

EAST COUNTY ADVANCED WATER PURIFICATION (AWP) PROGRAM (INDIRECT POTABLE REUSE PROJECT), JOINT POWERS AUTHORITY (SANTEE, CA) – Serving as assistant project manager, Rachel strategizes, plans and implements the public outreach program to change perceptions and build support for the East County AWP. Program tactics Rachel has coordinated include logo, branding and message development, website development and updates, tour program and school field trip development and tour lead, stakeholder identification, speakers bureau, collateral materials development, video creation, elected officials outreach and special events. Rachel planned, implemented and led tours of the program's demonstration facility that was visited by 7,000 people. She was also instrumental in helping to plan the program's award-winning groundbreaking, ribbon cutting and Water Festival events. Currently she is planning and implementing construction outreach of the treatment facility, 11-mile purified water pipeline and additional infrastructure to assure stakeholders are informed and their questions are expeditiously answered.
www.EastCountyAWP.com

PURE WATER OCEANSIDE (INDIRECT POTABLE REUSE PROJECT), CITY OF OCEANSIDE (OCEANSIDE, CA) – Rachel served as assistant project manager to educate, change public perception, create support and communicate about construction of the city's indirect potable reuse project. The project was designed to produce enough water to provide more than 30% of the city's water supply. Award-winning communication efforts have included developing and implementing a customer survey to guide outreach efforts, coordinating program branding, drafting communications plan, managing video production, developing project materials (fact sheet, FAQ, visitor center signs), drafting and managing website content, preparing social media content, planning and leading the tour program and coordinating special events including the project groundbreaking, dedication and the city's first World of Water Festival. Construction outreach efforts included notifications, signage, interactive map and managing the inquiry phone line.
https://www.ci.oceanside.ca.us/gov/water/pure_water_oceanside.asp

MISSION TRAILS PROJECT AND FLOW REGULATORY STRUCTURE II, SAN DIEGO COUNTY WATER AUTHORITY (SAN DIEGO, CA) – Rachel served as project manager for the community outreach efforts to inform and educate nearby park residents, park users, schools and park rangers for the construction of a water pipeline and flow control regulatory structure. Construction efforts required multiple trail closures in portions of a regional park prized by hikers, mountain bikers and nature lovers. Her efforts included



developing an email sign-up campaign, preparing project fact sheets and electronic newsletters, mailed notifications, door hangers, trail signs, interactive map updating the project webpage, providing community presentations, planning the project groundbreaking and project site stakeholder tour and implementing the school outreach "Street Smart" campaign. <https://www.sdcwa.org/projects/mission-trails-flow-regulatory-structure-ii/>

ADVANCED METERING INFRASTRUCTURE (AMI), CITY OF OCEANSIDE (OCEANSIDE, CA) – The city is upgrading all 44,000 of its residential and business water meters to provide remote water use updates on an hourly basis. The project, called WaterSmart, provides water use and billing transparency, enables customers to view water use 24/7 and to more quickly identify possible leaks and opportunities to reduce water use. Rachel managed the implementation of the communication plan starting with creating a project name, WaterSmart meters, branding, collateral materials, graphics and a webpage. She prepared protocol for the installing contractor to follow, bill insert, public meeting PowerPoint presentation, installation notices, door tag, FAQ and "Just the Facts" flyer. Rachel also facilitates the virtual public meetings, responds to customer inquiries and coordinates opt out requests. <https://www.ci.oceanside.ca.us/gov/water/watersmart/default.asp>

TWIN OAKS VALLEY WATER TREATMENT PLANT, SAN DIEGO COUNTY WATER AUTHORITY (SAN MARCOS, CA) – Rachel planned and managed a celebrated dedication event and tour program for the Twin Oaks Valley Water Treatment Plant - the largest submerged membrane water treatment plant in the world and the first treatment plant built by the San Diego County Water Authority at the time. Rachel also managed the creation of fact sheet, displays and webpage content for the project.

FAT, OIL & GREASE AND WASTEWATER SERVICES EDUCATION, CITY OF CARLSBAD, CA – Rachel managed a pilot program to raise awareness of improper disposal of fat, oil and grease into sewer pipes and to encourage positive sewer lateral maintenance habits for the City of Carlsbad. Responsibilities included creating a new "Scrape Your Plate" logo and food scraper, drafting a new fact sheet and coordinating information mailer and food scraper to a pilot community. Rachel also reorganized and created new pages for the wastewater website to feature homeowner sewer responsibilities, the City's sewer maintenance efforts and frequently asked questions.

COMMUNITY AND PUBLIC AFFAIRS OUTREACH, SANTA FE IRRIGATION DISTRICT (RANCHO SANTA FE, CA) – Rachel served as strategic advisor and project coordinator for public outreach efforts. Prepared per- and polyfluoroalkyl substances (PFAS) communications plan, COVID-19 frequently asked questions and a PowerPoint presentation for water officials. Efforts also included communication efforts to inform customers of proposed water rate increases including 218 notices, frequently asked questions and a speakers bureau Prezi presentation.

WATER CONSERVATION PUBLIC OUTREACH, VALLECITOS WATER DISTRICT (SAN MARCOS, CA) – Rachel served as project manager to plan and implement the water conservation communications program. She managed the development of a lobby banner, restaurant flyer with water efficiency tips and water use restrictions materials. Rachel also oversaw the development of new newsletter graphic design template, production of the agency's historical video and development of a social media guidelines manual.

WATER CONSERVATION CAMPAIGNS AND WATER COMMUNICATIONS, CITY OF OCEANSIDE (OCEANSIDE, CA) – Rachel serves as assistant project manager, providing community outreach services for water conservation, behavior change campaigns and green living communication. Rachel's water conservation communication efforts have included water conservation/behavior change key messaging, mailers/bill inserts, lobby and outdoor signs/banners, van and truck tailgate wraps, landscape workshops invitations, Oceanside Saves graphic icon, webpage and social media content. She has also coordinated the development of polyfluoroalkyl substances (PFAS/PFOA) key message points, COVID-19 water quality information, CCR/Water Quality Reports, signage, water/sewer rate 218 notices, CCR/water quality reports and WaterSmart program sign up outreach. Water/sewer infrastructure communication efforts have included reservoir upgrades, water/sewer pipeline replacement, emergency repairs, reclaimed water pipeline installation and connections, and automated meter infrastructure installation.

WATER EFFICIENCY MARKETING AND BEHAVIOR CHANGE PROGRAM, CITY OF SANTA MONICA (SANTA MONICA, CA) – Rachel managed the planning of a behavior change-marketing program for the City of Santa Monica. The city identified a water self-sufficiency goal to stop importing water by 2020. To be successful, each person would need to reduce his or her water use to 123 gallons a day. Rachel conducted a statistically sound baseline survey, managed the development of a new logo, branding and drafting of key messages that most motivate the City's water customers. A brochure, advertisements, lawn sign, press release and newsletter articles were prepared and a step-by-step pilot program was developed for the city to implement.



SUSAN DUFFETT

GRAPHIC DESIGNER

Susan is a graphic design professional with over 23 years of experience in branding and marketing. She specializes in logo designs and brand identity, social media graphics, brochures, marketing, and signage for public agencies and commercial developments. Working with public agencies, large corporations and production departments, Susan has developed effective, cohesive and memorable campaigns. Her creativity is matched by her ability to meet production deadlines in fast paced environments. She excels in incorporating branding and logo consistency throughout a variety of eye-catching collateral materials, including fact sheets, flyers, bill inserts, posters, PowerPoint presentations and banners. Susan has designed graphics for the Cities of Carlsbad, Chula Vista, Corona, Imperial Beach, Lemon Grove and Oceanside, Jurupa Community Services District, the Santa Fe Irrigation District, Olivenhain Municipal Water District, Padre Dam Municipal Water District, Ross Valley Sanitary District, San Diego County Water Authority and Vallecitos Municipal Water District. Susan's prior work includes a position with Hendry Lindman & Associates, a full-service advertising firm and Motivational Systems, Inc. a full service environmental graphic design firm.

EDUCATION

Platt College
Graphic Design Diploma

AWARDS

PRSA Bernays Best of Show Awards, Bronze, Creative Tactics – East County Advanced Water Purification Program

PRSA Bernays Best of Show Awards, Silver, Community Relations – Pure Water Oceanside, City of Oceanside

PRSA Bernays Best of Show Awards, Silver, Pure Water Oceanside, City of Oceanside

PRSA Bernays Best of Show Awards, Creative Tactics Excellence – Water Festival, East County Advanced Water Purification Program

EPIC Award, Best in Show, Green Oceanside Kitchen Launch Event

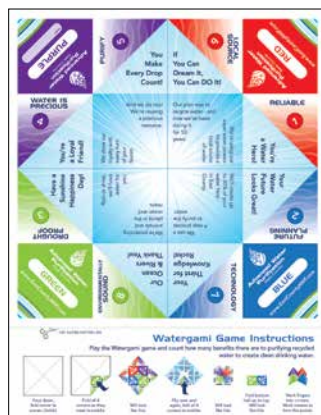
EPIC Award, Communications or Marketing Plans/Campaigns/ Medium Population, Pure Water Oceanside

CAPIO Award of Distinction, Padre Dam Municipal Water District - 2018 Annual Report

PROJECT EXPERIENCE

ADVANCED WATER TREATMENT PROGRAM - PUBLIC RELATIONS SUPPORT AND OUTREACH, PADRE DAM MUNICIPAL WATER DISTRICT (SANTEE, CA) –

For the facility, Susan designed the signs, branding guidelines, letterhead, PowerPoint graphics, Prezi presentation graphics, pocket folder, brochure, fact sheets, program and project elements maps, bill inserts, infographics, social media and website graphics, mailers, invitations, posters and lobby banners. For events, the facility's groundbreaking, Grand Opening, Beer Starts with Water, Water Festival and Secondary Connection Project, Susan designed nametags, a-frame directional signs, posterboards, banners, a 10x10 tent canopy, tablecloths, selfie station signs, a custom spin wheel game, table toppers, lenticular coasters, character tattoos, cups, frisbees and social media graphics. For the Tours Program, Susan designed stickers, bookmarks, cootie catchers, water journey flyer, character pillow, a logo patch, informational flyers, forms, student activity sheets, posters, social media and website graphics.



PURE WATER OCEANSIDE, CITY OF OCEANSIDE WATER UTILITIES DEPARTMENT (OCEANSIDE, CA) –

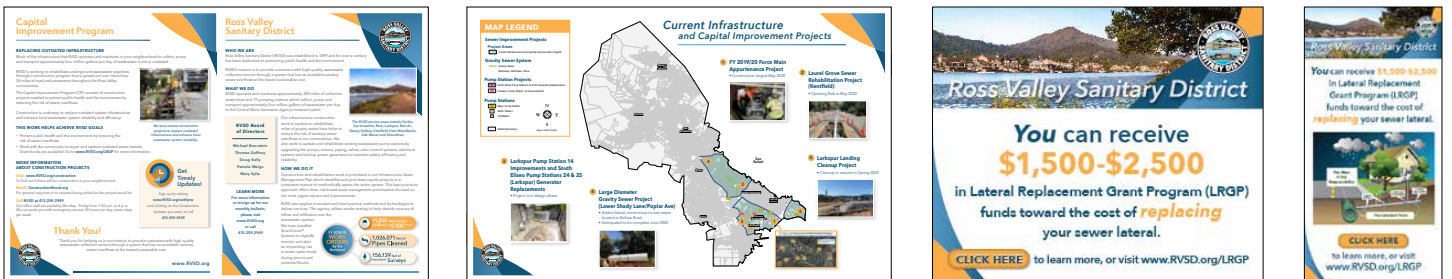
For the permanent facility, Susan designed various signs, history wall, forms, PowerPoint graphics, resident letters, stickers and lobby banners. For events: World of Water and the facility's Groundbreaking, Susan designed nametags, a passport booklet for stamping at stations, station signs, banners, a-frame



directional signs, flyers and collateral, social media graphics, tablecloths, stickers, lenticular coasters, lobby banners, wall banners (including a 11' wide by 24.5' high banner that unfolded down the side of a water tank for the unveiling), a custom logo rug and selfie station signs for photos. For the Tours Program, Susan designed flyers, forms, survey cards, bookmarks, decals, a logo patch, pens and a custom logo notebook.

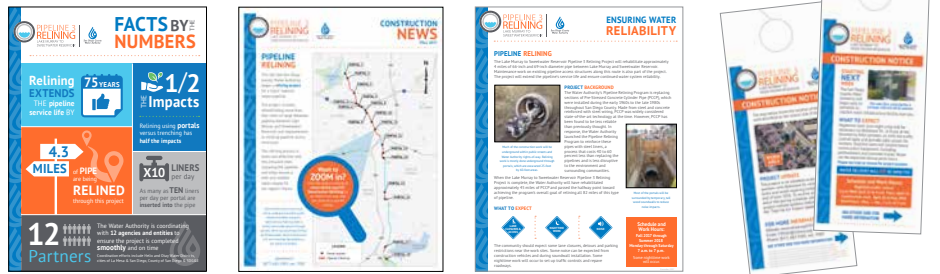


ROSS VALLEY SANITARY DISTRICT (RVSD) (SAN RAFAEL, CA) – Susan created the branding and graphics for RVSD and designs/manages all CIP maps, advertisements, digital assets, poster boards, brochures and web content.

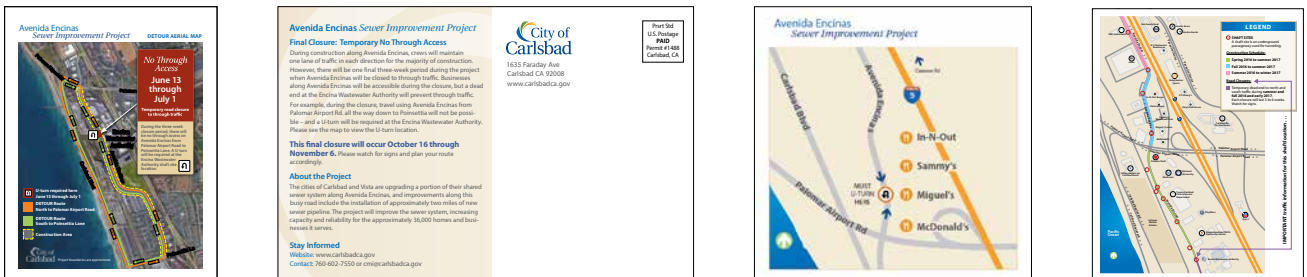


CONSERVATION OUTREACH, CITY OF OCEANSIDE WATER UTILITIES DEPARTMENT (OCEANSIDE, CA) – Susan has designed yearly water rate public notices, water quality reports, flyers, drought level notices, lobby banners, bill inserts, fountain barricade signs, drought response project signs, postcard mailers, workshop/class flyers, bill inserts, lobby signs, street banners and social media content for this project.

PIPELINE 3 RELINING PROJECT, SAN DIEGO COUNTY WATER AUTHORITY (SAN DIEGO, CA) – For this important infrastructure project, Susan designed business cards, letterhead, fact sheets, infographics, a-frame directional signs, banners, door hangers, direct mail postcards, magnets, maps, flyers and forms.



AVENIDA ENCINAS SEWER IMPROVEMENT PROJECT, CITY OF CARLSBAD (CARLSBAD, CA) – Susan has designed maps, business access signs, construction a-frames, door hangers, social media posts, flyers, folding mailers and postcards for this project.





LAUREN CLULOW

GRAPHIC DESIGNER

Lauren has more than 20 years of experience designing collateral for community relations programs – including transportation, water reuse and sustainability projects – for regional and local government agencies and municipalities. She works on projects for the cities of Chula Vista, Carlsbad and Oceanside, as well as SANDAG, East Bay Municipal Utility District and Padre Dam Municipal Water District/East County Advanced Water Purification Program JPA. As a professional who comes from a long line of artists and artisans, Lauren describes her drive to make things beautiful as a quality deeply ingrained and “inherited as an ability to conceptualize an aesthetic plan with the awareness of how to execute” a mother who is an interior designer and her father, who is a carpenter. For Lauren, graphic design is the perfect intersection of these two skills. Lauren began her career designing environmental graphics, marketing plans, books and brands for corporations. After a decade she established her own design studio and thrived providing creative direction, editorial design, production services and photo styling to an ever-growing roster of businesses and entrepreneurs. She believes that “while beauty is important, it’s not the whole story: great design also conveys clarity, purpose and meaning.” At Ardurra, Lauren focuses on branding and designing both print and digital marketing materials that educate, inform and inspire behavior change relating to all aspects of public works, engineering, infrastructure, transportation and water.

EDUCATION

Carnegie Mellon
BFA, Communication and Design

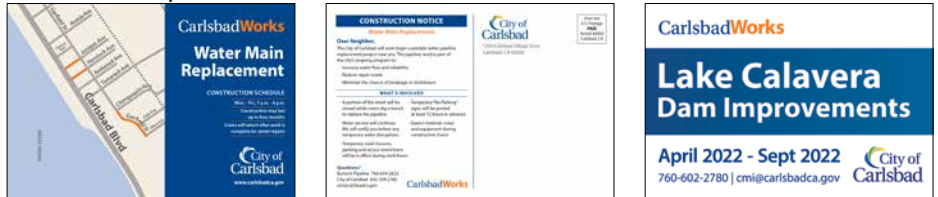
AWARDS

2021 PRSA Bernays Silver Award – City of Carlsbad Sustainable Mobility Plan – Stakeholder Working Group as part of the team that secured a total of thirteen awards at the Edward L. Bernays Mark of Excellence

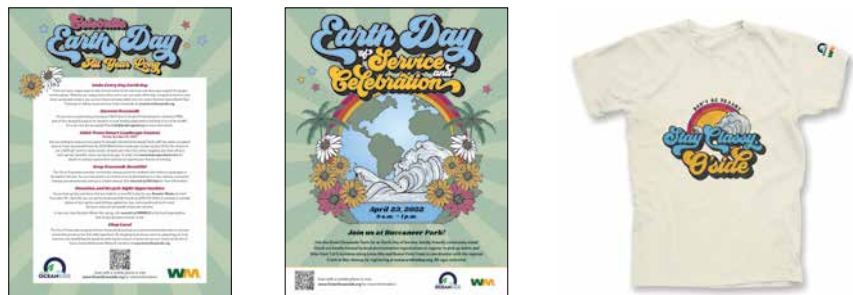
2019 PRSA (Public Relations Society of America) “Best of Show” award as part of the team that secured a total of seven awards at the Edward L. Bernays Mark of Excellence

PROJECT EXPERIENCE

CITY OF CARLSBAD (CARLSBAD, CA) – Designed construction signage, notifications, postcards and maps.



CITY OF OCEANSIDE (OCEANSIDE, CA) – Designed posters, t-shirts, flyers and bill inserts.



CITY OF EL CAJON AND EAST COUNTY AWP (EL CAJON, CA) – Designed social media graphics.

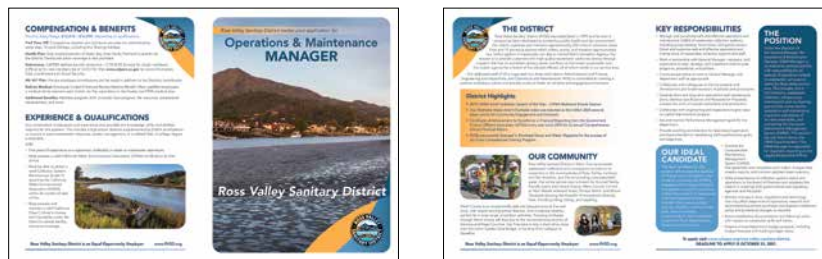




JURUPA COMMUNITY SERVICES DISTRICT (JURUPA, CA) – Created map graphics for JCSD’s Recycled Water Project.

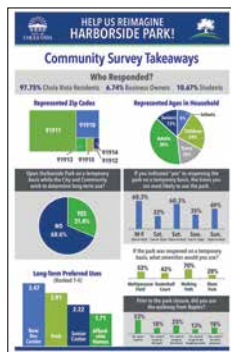


ROSS VALLEY SANITARY DISTRICT (SAN RAFAEL, CA) – Designed flyers for community engagement.



SANDAG AND CITY OF SAN DIEGO (SAN DIEGO, CA) – Designed billboards, social media and website graphics, branding guidelines and PowerPoint templates.

CITY OF CHULA VISTA (CHULA VISTA, CA) – Designed social media graphics, public hearing materials, infographics for “Help Us Reimagine Harborside Park!” Created logos and social media graphics for the City’s Landlord Tenant program. Created posters, infographics, fact sheets, banners for announcement of Cinematic Arts Academic Center & Library.



EASTERN MUNICIPAL WATER DISTRICT (PERRIS, CA) – Designed social media graphics, fact sheets, brochures, bill inserts, event materials, postcards for Landscape for Living program.





YOLANDA ART

COMMUNITY RELATIONS COORDINATOR

Yolanda specializes as a Community Relations Project Coordinator offering bilingual outreach that is also bicultural (as a native of Guadalajara, Mexico). She brings more than 20 years of experience with experience that began in the late 1990's serving as the secretary for the first community outreach meetings held by the Kelco Community Advisory Panel (CAP) in Barrio Logan, which included members of the San Diego Environmental Health Coalition, Barrio Logan Health Clinic, Barrio Station, and other community groups that were vocally and forcefully opposed to plant emissions and the corporation's very presence in the community. Yolanda's bilingual, organizational and interpersonal skills were key in the successful relationship building with the CAP. She also served as secretary for the County of San Diego TAC and she serves as Assistant Project Manager for projects like the City of Chula Vista Tenant Landlord Ordinance public education and Harborside Park engagement project.

Yolanda has worked to provide support to the Municipal Engineering and Infrastructure group of a global municipal management and engineering firm. She provided project coordination and organization for routing of design and construction plan check packages. She also tailored project and corporate material working with the InDesign Program. Her past work includes finance team support for the New York-based independent research organization Data & Society. Yolanda's accounting and organization work helped keep the nonprofit's focus on empirical research to inform development and governance of new technology and social implications of data and automation, working directly with the Finance Administrator. Her attention to detail was honed at the Irvine Company and SENTRE Partners (acquired by Irvine Co in 2009) where her responsibilities included management of corporate and tenant needs. She worked closely with the Marketing Director developing content for the quarterly newsletter and coordinating creative and engaging events.

Yolanda's community engagement and special events management spans from water conservation and education outreach to transportation and as needed municipal services. Her bilingual skills and organizational support is key for community relations project success.

PROJECT EXPERIENCE

COMMUNITY RELATIONS AND CONSTRUCTION OUTREACH FOR THE EAST COUNTY ADVANCED WATER PURIFICATION (AWP), EAST COUNTY ADVANCED AWP JPA, ADMINISTERED BY PADRE DAM MWD (SANTEE, CA) – Yolanda provides support on public engagement and special events for this project with a focus on special events.

COMMUNICATIONS AND COMMUNITY RELATIONS FOR RVSD CIP PROGRAM, ROSS VALLEY SANITARY DISTRICT (SAN RAFAEL, CA) – Yolanda is the Project Coordinator for this agency, the oldest sanitary district in California with more than 100 years providing wastewater collection services to communities in Marin County. She assists in development of the monthly General Manager Bulletin / Newsletter and assist with updates to the agency website and social media.

CONSERVATION OUTREACH AND PURE WATER OCEANSIDE COMMUNICATIONS, CITY OF OCEANSIDE WATER UTILITIES DEPARTMENT (OCEANSIDE, CA) – Yolanda provides support on the GreenOceanside program and

EDUCATION

San Diego State University
B.A., Communications

PROFESSIONAL AFFILIATIONS

Boardmember for Canyonview
Elementary School Foundation

Member of the Poway Unified School
District PTA

Volunteer with the San Diego MS
Walk, Children's Hospital and the Baja
Challenge with Project Mercy



Pure Water Oceanside public outreach and special events. She provided end-to-end services for the PWO groundbreaking event in early 2020, an innovative program that will produce enough water to provide more than 30% of the city's water supply by purifying recycled water to create a new, local source of high-quality drinking water that is clean, safe, drought-proof and environmentally sound. She also supports Oceanside results-focused water conservation campaigns that educate customers/water users about using water wisely, water restrictions, drought/climate change, incentive opportunities (rebates, grants), workshops/classes and water saving tips. Yolanda provides bilingual review of fact sheets, videos, infographics, bill inserts, lobby signs, street banners and social media content.

CITY OF CHULA VISTA AS NEEDED COMMUNITY RELATIONS SERVICES, CITY OF CHULA VISTA, CA – Yolanda serves as Assistant Project Manager for the City's public education and engagement to "Reimagine Harborside Park" effort, following the City Council decision to temporarily close this park in August 2022 due to increased criminal activity as a homeless encampment at the park grew. The proximity to Harborside Elementary, local businesses and the San Diego County Health and Human Services Agency, as well as a shooting at the encampment added layers of complexity to this effort. Gabriela led bilingual facilitation with the community and provided input on a survey effort that resulted in hundreds of responses on the City's 90-day planning period following the park closure as well as long-term development on the Harborside site. She also provides as needed services with the Ardurra team to support bilingual facilitation in stakeholder meetings for the Chula Vista Landlord Tenant Ordinance education effort. She helped to develop informational materials and worked on a survey to gather understanding of tenant and landlord experiences. The data, collected in English and Spanish, was focused on single family homeowners to gauge what they currently know about landlord/tenant rights/responsibilities. In addition, an education and engagement campaign increased awareness and understanding of the new ordinance that will go into effect March 1, 2023. Yolanda was instrumental in planning for and implementing the media announcement and milestone celebration for the new Cinematic Arts Academic Center & Library, a collaborative multi-agency effort that includes the City, San Diego State University (SDSU), Southwestern Community College, State Assembly and State Senate elected officials and Chesnut Properties' Millenia development.

COMMUNICATIONS AND ADVERTISING CAMPAIGN FOR THE BUS ON SHOULDER PILOT PROGRAM, SANDAG (SAN DIEGO, CA) – Yolanda served as Project Coordinator for this three-year demonstration project (a partnership project among San Diego Association of Governments; the California Department of Transportation District 11, Caltrans; the San Diego Metropolitan Transit System, MTS; California Highway Patrol, CHP; Federal Transit Administration, FTA and the U.S. Department of Transportation Federal Highway Administration, FHA). The Project will assess expansion of innovative transportation options.

COUNTY OF SAN DIEGO TECHNICAL ADVISORY COMMITTEE (TAC), COUNTY OF SAN DIEGO, CA – Yolanda served as secretary and community outreach support for the County of San Diego TAC.

COMMUNITY ENGAGEMENT, KELCO/MONSANTO COMMUNITY ADVISORY PANEL (BARRIO LOGAN, CA) – Yolanda served as Secretary for the Community Advisory Panel (CAP) for Kelco / Monsanto in the Barrio Logan community, assisting the facilitator with bilingual capabilities. CAP members included Hispanic leaders, environmental activists, business representatives and neighbors to this biogum and kelp processing plant. She worked to implement and support the successful Open House for the plant to take its first step in engaging the community at an event hosted onsite. As one of the largest and most visible consumers of water in San Diego at the time, information about sustainability and responsible water use was a key component. In the late 1990's the CAP meetings held at the Kelco plant included members of the San Diego Environmental Health Coalition, Barrio Logan Health Clinic, Barrio Station, and other community groups that were vocally and forcefully opposed to plant emissions and the corporation's very presence in the community. Yolanda's bilingual, organizational and interpersonal skills were key in the successful relationship building with the CAP. The positive engagement led to a Kelco hosted Open House and improved community relations and local hiring initiatives. Yolanda continued to support the Kelco CAP bilingual facilitator and positive community support through the plant acquisition by ISP Alginates and ultimately Monsanto global corporation.



Waste Management (WM)

Ardurra is managing community outreach and education for WM and the City of Oceanside with the new launch of its organics outreach to residential and multi-family homes and businesses.

Your Landfill/Recycling/Green Waste Service Day is CHANGING!

Beginning the week of **June 12, 2023**, your **NEW** service day will be:

- Please have your landfill, recycling and green waste carts at the curb by 6 a.m. starting the week of June 12 on your **NEW** service day.
- Your street sweeping day will remain the same.
- The service day change will streamline our operations and provide routing efficiency to all Oceanside neighborhoods.

Thank you,
Your friends at WM

CURRENT Service Day	NEW Service Day
Monday	Friday
Tuesday	Thursday
Wednesday	Monday
Thursday	Wednesday
Friday	Tuesday

Phone: (760) 439-2824 • Email: csandiego@wm.com • Web: www.wm.com/oceanside

Postcard Mailer

Your Weekly Residential Service Day is CHANGING!

Effective week of **June 12**

CURRENT Service Day	NEW Service Day
Monday	Friday
Tuesday	Thursday
Wednesday	Monday
Thursday	Wednesday
Friday	Tuesday

Social Media

JUNE IMPORTANT REMINDER

Your Landfill/Recycling/Green Waste Service Day is CHANGING!

Effective **June 12** please have your landfill, recycling and green waste carts at the curb by 6 a.m. on **Monday** (and every week following)

Thank you for the opportunity to serve you. We appreciate your patience during this transition.

en español
sa Tagalog

WM OCEANSIDE
Phone: (760) 439-2824
Email: csandiego@wm.com
Web: www.wm.com/oceanside

Bin Tags

Programs and Services

Important Contact Information

Free Community Resources

RESIDENT'S GUIDE to Zero Waste

NEW curbside organics recycling and programs coming in January 2024

Check your mail for updates coming this fall!

Workshops and Events

Residential Service Folding Mailer (outside)

RECYCLABLES

FOOD SCRAPS

LANDFILL

IT'S HERE! FOOD SCRAPS RECYCLING PROGRAM

The Food Scraps Recycling Program...

Sort it out as easy as 1, 2, 3!

1. Use the correct bin for your waste.

2. Use the right container and lid.

3. This is the right after you sort it out.

Mailer with Magnet

WHERE Does it Go?

RECYCLABLES

GREEN WASTE

LANDFILL

RECYCLE RIGHT FOR ZERO WASTE

Residential Curbside Services

Set Out for Success

Holiday Schedule

Month	Service Day
January	New Year's Day
February	Memorial Day
July	Independence Day
September	Labor Day
November	Thanksgiving Day
December	Christmas Day

Residential Service Folding Mailer (inside)

Sort It Out for Food Waste Victory!

Feel Good Knowing Your Organics are Recycled!

Oceanside Residential Recycling, Organics and Landfill Service Guide

Basics

Did You Know?

Connection Made Easy

WM ONE Planet. TAKE Action.

Residential Service Guide Booklet



Santa Fe Irrigation District (SFID)

Ardurra drafted and designed District fact sheets and planned its 100-year anniversary event.

WATER TREATMENT

SANTA FE IRRIGATION DISTRICT
Providing safe and efficient water to our customers

FACT SHEET

Water is essential for life. It is also essential for the growth of our community. The Santa Fe Irrigation District (SFID) is committed to providing safe and efficient water to our customers. Our water treatment process is designed to remove any contaminants that may be present in the water. This process includes filtration, disinfection, and pH adjustment. The result is clean, clear water that is safe to drink and use for irrigation.

100% LOCAL
100% RECYCLED
100% SAFE

2-sided Folding Fact Sheet (outside)

WHERE OUR WATER COMES FROM

LAKE HODGES

FAST FACTS

SAN DIEGUITO RESERVOIR

Water is essential for life. It is also essential for the growth of our community. The Santa Fe Irrigation District (SFID) is committed to providing safe and efficient water to our customers. Our water treatment process is designed to remove any contaminants that may be present in the water. This process includes filtration, disinfection, and pH adjustment. The result is clean, clear water that is safe to drink and use for irrigation.

2-sided Folding Fact Sheet (inside)

FREQUENTLY ASKED QUESTIONS

REGULATORY ASSESSMENT QUANTITIES REGARDING PROPOSED ADJUSTMENTS FOR WATER SERVICE CHARGES

REGULATORY ASSESSMENT QUANTITIES REGARDING PROPOSED ADJUSTMENTS FOR WASTE SERVICE CHARGES

PROPOSED RATE STRUCTURE - WATER OVERLAY

Year	Water	Waste	Service	Other	Total
2023	1.20	1.20	1.20	0.00	3.60
2024	1.20	1.20	1.20	0.00	3.60
2025	1.20	1.20	1.20	0.00	3.60
2026	1.20	1.20	1.20	0.00	3.60
2027	1.20	1.20	1.20	0.00	3.60
2028	1.20	1.20	1.20	0.00	3.60
2029	1.20	1.20	1.20	0.00	3.60
2030	1.20	1.20	1.20	0.00	3.60

Frequently Asked Questions

VISION SFID will proactively ensure:

- Sustainable Water Supplies
- Reliable Infrastructure
- High-Performing Staff
- Cost-Effective Operations
- Customer Service Focus
- Environmental Stewardship
- Resiliency

Infographics

VALUES In its actions and decisions, SFID prioritizes:

- Teamwork
- Transparency
- Integrity
- Accountability
- Continuous Improvement
- Sustainability



100th Anniversary Event Custom Freestanding Photo Collage

100th Anniversary Event

San Diego Reservoir
2025 Boulevard, Rancho Santa Fe, CA 92077

Event

Event will be outdoors. Closed to traffic. Flat shoes are recommended. Look for EVENT signs at this location on the event site.

Event Program

Commemorating Santa Fe Irrigation District's vital contributions to the community's water supply for 100 years. Today and always we shall reflect on the District's rich history and remarkable milestones achieved over the last century of service.

BOARD OF DIRECTORS

- President: Michael T. Hogan
- Vice-President: Dana Frisvold
- Sandra O. Johnson
- Ron Magnaghi
- Anne Marie Menstehak

GENERAL MANAGER
Albert C. Lau

Social Media and Constant Contact

You're Invited!

JUNE 21
10 AM

Century of Service

with Santa Fe Irrigation District

San Diego Reservoir
2025 Boulevard, Rancho Santa Fe, CA 92077

Highly encouraged to be present!

ACCESS EVENT SITE HERE

EVENT

Event Signage

SANTA FE IRRIGATION DISTRICT

Century of Service

Cheers to 100 Years!

Welcome!

Thank you for joining us as we celebrate a

Century of Service

with Santa Fe Irrigation District

Cheers to 100 Years!



Eastern Municipal Water District (EMWD)

Ardurra created the award-winning water efficiency program, Landscapes for Living for EMWD.

Logo Design



Newspaper and Digital Ads



Graphic

Flyers



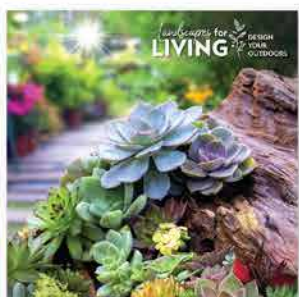
Postcard



Frequently Asked Questions



Bill Insert



Social Media





East County Advanced Water Purification

Since 2014, the Ardurra communications team has conducted community outreach and construction relations for the East County Advanced Water Purification Project.



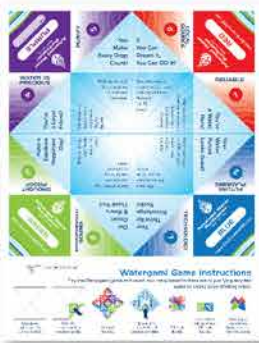
Logo Design



Style and Branding Guide



2-sided Folding Program Brochure (outside)



Watergami Cootie Catcher



Wheel of Water Spin Game



Bookmark



2-sided Folding Program Brochure (inside)



Character Design



Infographic



Construction Flyer



Construction Mailer



Social Media Posts



San Diego County Water Authority (SDCWA)

Ardurra's construction relations team managed the outreach for a Water Authority pipeline relining and flow regulatory structure project.

Pipeline 3 Relining Project



Flyers and Infographic

Mission Trails Flow Regulatory Structure II Project



Flyer, Handout and Business Cards



Construction Notices and Vehicle Pass



Postcard Mailer



Letterhead, Business Cards, Event Sign-in Sheet and Magnet



2-sided Project Update Mailer

Please find below our proposed budget and corresponding scope of work and assumptions for year one of the contract.

Lump Sum Not-to-Exceed Fee

Not-to-Exceed Fee - Budget for Year 1	Project Manager	Asst. Project Manager	Strategic Advisors (Ardurra & Hoch)	Wastewater Comm Specialist (Hoch)	Community Relations Coordinators	Graphic Designers	Total Hours	Labor	Expenses	Task Total
	\$240	\$210	\$252	\$200	\$105	\$160				
1. Account Management	40	20	10	0	3	0	73	\$ 16,635	\$255	\$ 16,890
2. Community Outreach	50	30	20	18	5	50	173	\$ 35,465	\$250	\$ 35,715
3. Public Relations	20	15	18	5	2	4	64	\$ 14,336	\$0	\$ 14,336
4. Social Media	25	25	20	10	20	30	130	\$ 25,190	\$250	\$ 25,440
5. Monthly Reports	25	20	0	0	0	0	45	\$ 10,200	\$0	\$ 10,200
6. Public Outreach Museum Display	25	25	5	5	0	4	64	\$ 14,150	\$200	\$ 14,350
Total Hours	185	135	73	38	30	88	549			
Total Labor	\$ 44,400	\$ 28,350	\$ 18,396	\$ 7,600	\$ 3,150	\$ 14,080		\$ 115,976		
Total Expenses									\$955	
Total Estimated Project Cost										\$116,931

Escalation: The rates are proposed for year one, with escalation of 4% for the following years.

Fees for Subconsultant Services: Billed at actual cost, plus five percent (5%) to cover overhead and administration.

Ardurra Assumptions for Scope of Work

1. Account Management

- By phone or teleconference capabilities, one Ardurra team member to participate in monthly one hour strategy discussions with designated District contact(s).
- Monitor local and national publications and online alerts for Valley Sanitary District stories. Efforts are budgeted in Task 3.
- Provide Spanish and other language translation services. This effort is budgeted in Task 2c.
- Develop and manage a 12-month calendar for District communications and execution plan.
- Provide management and direction in implementing and maintaining a strategic communication plan.
- Provide recommendations and strategies as deemed appropriate to enhance the District's image, messaging, and brand identity. These efforts will be included in the communication plan and monthly discussions.
 - Crisis communication will be provided as an optional service, budgeted separately if awarded the contract.
 - Concept strategies and planning.
 - Develop original copy (text), copywriting, and editing, including Spanish and other language marketing collateral. Budgeting for these efforts are included in Task 3.

2. Community Outreach

- Develop 4 e-newsletters to educate and advise subscribers on District's issues, meetings, events, programs, services, and projects. Assumes District pays for digital newsletter platform service.
- Work with District partners and influencers to gather news about the District for distribution via social media, e-news platform, and the District website. Includes contacting and coordinating with up to 5 influencers/partners.
- Develop news releases, media advisories, website content, and fact sheet for District events, initiatives, projects, and services. Includes drafting and distributing up to 2 news releases and 1 media advisory. Draft 2 pages of webpage content. Copywrite and graphically design 1 two-page fact sheet. Provide Spanish translation services and up to 1 other language for up to 2, two-page targeted communication pieces. Assumes District will format content to VSD website and pay for all printed materials as well mailing/postage costs.
- Provide community outreach to ensure public engagement related to District ongoing activities and objectives, including graphic design, and media production. Includes 1 PowerPoint presentation and presenting at up to two meetings.
- Examine existing and upcoming programs and initiatives of the District and develop strategies for promoting efforts in the community. This effort is budgeted in Task 3 as part of developing the communication plan.



3. Public Relations

- a. Prepare a tailored, comprehensive communication plan to include tactics to enhance the District's social media outlets, including providing strategic support for communication projects, initiatives, and campaigns designed to advance the District's vision, mission, image, and branding.
- b. The plan will include public relations strategies to raise public and community awareness of the District's upcoming events.
- c. Create messaging to drive interaction and share relevant content by providing opportunities to interact with the programs and services - to be included in the communication plan. News releases, media advisories and distribution are included in Task 2.
- d. Develop public relations strategies to raise public and community awareness of the District's matters and include in the communication plan.
- e. Continue to refine and develop new customer onboarding engagements via email messages and content about the District services, meetings, and service options.
- f. Develop strategies for countering misinformation and misconceptions and include in the communication plan.
- g. Tracking and responding to stories, events, and crises, in the media that may benefit the District from a response on behalf of the District.

4. Social Media

- a. Provide District staff with guidance on marketing best practices as a critical source for social media content. Guidance and best practices will be included in Task 3.
- b. Identify appropriate imagery to aid social media posts' work impact and reach. Includes designing up to 18 social media graphics and identifying/purchasing 10 stock photos to use for social media for one post weekly for one year.
- c. Build messaging that can be used in various channels, including social media and paid traditional media, to target critical audiences through timely and relevant channels to drive awareness, create an emotional connection, educate on important actions, and drive traffic to the website and all social media platforms. Includes copy for up to 25 social media posts - two post per month.

5. Monthly Reports

Submit monthly reports to the District summarizing activities during the previous month before identified due date. Meet with the Community Engagement Committee virtually as requested, up to 4 times, to discuss reports and deliverables.

6. Public Outreach Museum Display Video Presentation

This task will include a video documentary of up to five minutes for public viewing at the Coachella Valley History Museum exhibit and placed on the District's social media, e-news platform, and the District website, as well as a submission to the CWEA section for public outreach program award. Quote assumes the videographer/producer will be paid directly by the District. This task will need to be completed immediately upon execution of the contract.

7. Centennial Celebration Development and Planning

The 2025 special event will be budgeted separately as it does not occur within the first year of the contract.



PROPOSAL

Valley Sanitary District

Social Media and Public
Relations Services

August 2023





**REGIONAL
GOVERNMENT
SERVICES**

SERVING PUBLIC AGENCIES SINCE 2002

August 23, 2023

Holly Gould, Clerk of the Board

VALLEY SANITARY DISTRICT

45500 Van Buren St

Indio, CA 92201

Email: hevans@valley-sanitary.org

RE: PROPOSAL TO VALLEY SANITARY DISTRICT TO PROVIDE SOCIAL MEDIA AND PUBLIC RELATIONS SERVICES

Dear Ms. Gould,

Regional Government Services Authority (RGS) is pleased to submit this Proposal to Valley Sanitary District (VSD) in response to the Request for Proposals (RFP) for Social Media and Public Relations Services. RGS is a unique, fee-supported, public agency (joint powers authority) specializing in public-sector administration and consulting services. RGS exclusively serves public agencies and employs experienced public-sector professionals to assist our partner agencies. Since our formation in 2001, RGS has served nearly 400 public agencies.

I am confident that you will find RGS' approach is responsive to each of VSD's objectives and needs. The plan provides for tools and support to meet or exceed the goals listed in VSD's scope of services. RGS has a solid and respected reputation with the public agencies we serve for timely, cost-efficient delivery and effective implementation. As a public agency, we fully understand the needs and requirements of public agencies. The project contact is Ashley Metzger, Strategic Services Consultant and she can be reached at (650) 587-7308 or via email: ametzger@rgs.ca.gov.

We hope to have the opportunity to work with you and your team on this exciting project. If you have any questions regarding this response, please contact me directly at (650) 587-7315 or via e-mail at sselivanoff@rgs.ca.gov. This proposal will remain valid for 90 days from the date of this letter.

Sincerely,

A handwritten signature in black ink that reads 'Sophia Selivanoff' with a stylized flourish at the end.

Sophia Selivanoff, Executive Director

REGIONAL GOVERNMENT SERVICES

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SOCIAL MEDIA AND PUBLIC RELATIONS SERVICES

EXECUTIVE SUMMARY

Regional Government Services (RGS) is well positioned to support Valley Sanitary District (VSD) with its communications needs in the coming year. Unlike communications firms that may otherwise fill this type of need, RGS is a public agency. This means we're able to offer competitive rates and public professionals who not only understand the nuances of working in government but have also done it themselves.

Our team has decades of public sector communications experience. Three of the advisors we're proposing for this project have worked extensively in the Indio area. Our advisors also have deep experience in water and wastewater.

RGS' Communications and Engagement service line has key players who are well-versed in account management, community outreach, public relations, social media, reporting, and event planning. We are confident that we are an ideal partner to execute this scope of work and we look forward to diving in to help VSD meet its strategic objectives with a powerful, dynamic communications campaign.

QUALIFICATIONS AND EXPERIENCE

Regional Government Services was formed in 2001 by a city and a regional planning and services agency to help local governments meet three challenges: decreasing revenues, increasing service demands (and costs), and loss of experienced staff. Government leaders knew that these challenges were likely to continue, so agencies would have to work together – uniting not only their voices but their resources to advocate and become more efficient. The idea behind creating RGS was to form an agency that would help local governments share expertise and improve efficiencies. A need was emerging for some way to help agencies get the expertise and experience needed without each agency having to hire full-time staff when the need might be less than full-time. Agencies could, in effect, share expertise through a third party. This approach directly aligns with VSD's needs for communications and outreach services.

Today, RGS is a solvent organization governed by several member agencies, all with the common goal expressed in the JPA's mission statement: To provide quality, innovative, cost-effective services exclusively to public agencies. RGS has now served nearly 400 cities, special districts, joint powers authorities, and other local governments and non-profits that support local governments. RGS currently has about 190 employees.

RGS developed a highly flexible platform of administrative support and programs that could serve the diverse needs of cities, special districts, counties, and other joint powers authorities.

SOCIAL MEDIA AND PUBLIC RELATIONS SERVICES

Flexibility was vital because the needs of partner agencies varied and because RGS services are 100 percent fee-based. Thus, RGS costs needed to be able to ramp up or down quickly as demand changed.

The highest value RGS can bring is to share our experiences with our clients, constantly refining Best Practices to provide quality expertise to benefit all our partner clients. The RGS staff prides itself on its ability to deliver accurate, professional products and services within reasonable timelines. We meet deadlines and provide clear, honest, and effective communications, all of which help promote good relations with stakeholders at all phases of a project.

PARTIAL CLIENT LIST

- Central Marin Sanitation Agency
- Citrus Heights Water District
- City of Banning
- Coachella Valley Public Cemetery District
- Colusa Groundwater Authority
- Del Paso Manor Water District
- Desert Water Agency
- Elk Grove Water District
- Hi-Desert Water District
- Indian Wells Valley Groundwater Authority
- Irvine Ranch Water District
- Marin Municipal Water District
- Monterey Peninsula Water Management District
- Pajaro Valley Water Management Agency
- Regional Water Authority
- Rural North Vacaville Water District
- Sacramento Suburban Water District
- Salinas Valley Basin Groundwater Sustainability Agency
- San Francisco Bay Area Water Emergency Transportation Authority
- Santa Clara Valley Water
- Solano County Water Agency
- Sunnyslope County Water District
- Sweetwater Springs Water District
- Twentynine Palms Water District
- Vallejo Flood & Wastewater District
- Water Replenishment District of Southern CA
- West County Wastewater
- West Valley Water District

SOCIAL MEDIA AND PUBLIC RELATIONS SERVICES

KEY STAFF

ASHLEY METZGER, LEAD ADVISOR

Ashley knows the local media market and demographics – she’s been working in communications in the Coachella Valley for more than a dozen years. As Director of Public Affairs & Water Planning, she successfully executed a 60th Anniversary campaign for Desert Water Agency in 2021. For VSD’s project, Ashley would oversee the project team and guide the strategy development, including how to reflect VSD’s mission and vision into the project execution. Ashley would lead crisis communications responses and coach VSD executives and Board on media interviews and speaking engagements.

CASEY DOLAN, SENIOR ADVISOR

Casey has over twenty years of professional experience in broadcast and digital media in the Coachella Valley, creating and managing content, website development, social media management, search engine optimization, display, search advertising, public relations, and all things digital. He delivers digital and social media projects for RGS partners.

JOAN PLIEGO, SENIOR ADVISOR

Joan holds a professional certificate in grant writing and is a passionate and capable copywriter. She has worked extensively on social media for public agencies. For this project, Joan would develop content and coordinate event and programming concepts, planning and logistics. She would be the primary RGS team member driving success of the Centennial Celebration Development and Programming.

ERIC SAMUELSON, SENIOR ADVISOR

Eric has been working in advertising and creative for decades – including in the Coachella Valley. In addition to his public sector expertise, Eric has worked to develop and reinforce strong local brands like Renova Solar. For this project, Eric will produce compelling graphic campaigns to be used for social media, website, newsletter, and other project materials. Eric will work closely with the RGS and VSD teams to create a compelling and cohesive campaign band for the Centennial Celebration.

SOCIAL MEDIA AND PUBLIC RELATIONS SERVICES

MAURA GRIFFIN, TECHNICAL SPECIALIST

Maura Griffin joined RGS in 2019 and serves as a Technical Specialist for the Communications and Engagement Service Line. Maura develops marketing collateral, conducts online research, and manages different avenues of outreach such as social media, newsletters, infographics, and instant messaging. She brings a creative spark to all her work including administrative tasks as well as content strategy, formatting, and layout design.

MATTHEW JADRICH, TECHNICAL SPECIALIST

Matthew facilitates powerful social media and digital presence. Matthew works extensively to write compelling copy and provide analytics to inform strategic decisions. Matthew has worked for successful startups and for IBM. For this project, Matthew will develop the content calendar, create monthly reports, coordinate outreach pushes, and create compelling content. Matt will coordinate needed translations, track project deliverables and work with vendors as needed to ensure a successful project and Centennial Celebration plan.

* Full RGS Resumes can be found in **Appendix A** of this submittal.

RELEVANT EXPERIENCE

DESERT WATER AGENCY

RGS counsels, develops, and implements outreach projects for Desert Water Agency. This includes crisis communications, media relations, branding, advertising and sponsorship recommendations, development of collateral, social media, internal communications, and research. The contract supports Desert Water Agency staff and Board of Directors with strategic guidance and creative solutions.

Recently, RGS helped manage and execute the Proposition 218 process for increased water, wastewater, and recycled water rates. This included key stakeholder meetings, community workshops, media interviews, development of the notice and coordination for legal compliance review.

[DESERT WATER AGENCY WORK SAMPLES](#)

SOCIAL MEDIA AND PUBLIC RELATIONS SERVICES

CITRUS HEIGHTS WATER DISTRICT

RGS supports Citrus Heights Water District with ongoing communications needs and with strategic support on a sensitive project. RGS has helped the District with content development and management for social media, events, newsletters, bill inserts, videos, public polling, informal surveys and more.

The RGS team recently created a “thanks to water” campaign that it presented to the CHWD Board of Directors prior to implementation. RGS also led the charge to reinvigorate CHWD’s Customer Advisory Committee (CAC). This required RGS to draft a resolution and staff report recommending program changes and get Board authorization. RGS then developed and launched a survey of existing members to lay the groundwork for the CAC program in the coming year.

[CITRUS HEIGHTS WATER DISTRICT WORK SAMPLES](#)

DUBLIN SAN RAMON SERVICES DISTRICT

RGS develops the monthly email newsletter and social media content for Dublin San Ramon Services District, provides informational tools for training, and maintains the district website. RGS also aided recruitment efforts for an in-house communications position.

The RGS team recently performed outreach around a facility tour that was fully booked well in advance of the tour date. The RGS team has worked to make District posts more cohesive visually and in voice.

[DUBLIN SAN RAMON SERVICES DISTRICT WORK SAMPLES](#)

EVIDENCE OF CALIFORNIA LICENSING

RGS is a public agency, therefore this is not applicable, however, RGS will obtain business license if required.

SOCIAL MEDIA AND PUBLIC RELATIONS SERVICES

REFERENCES

DESERT WATER AGENCY

Mark Krause, General Manager

Email: mkrause@dwa.org

Ph: (760) 323-4971 ext. 110

CITRUS HEIGHTS WATER DISTRICT

Hilary Straus, General Manager

Email: hstraus@chwd.org

Ph: (916) 725-6873

DUBLIN SAN RAMON SERVICES DISTRICT

Michelle Gallardo, Special Assistant to the
General Manager

Email: gallardo@dsrsd.com

Ph: (925) 828-0515

WEST BUSINESS DEVELOPMENT CENTER

Mary Anne Petrillo, CEO

Email: maryanne@westcenter.org

Ph: (707) 964-7571

BEST, BEST & KRIEGER

(CONFIDENTIAL WATER DISTRICT PROJECT)

Steve Anderson, Partner

Email: steve.anderson@bbklaw.com

Ph: (951) 826-8279

SONOMA MENDOCINO ECONOMIC DEVELOPMENT DISTRICT

Robin Bartholow, Chair

Email: robin@sonomafb.org

Ph: (707) 544-5575

SUBCONSULTANTS

RGS plans to use subconsultants for this engagement for:

- Spanish translation
- videography
- video editing
- social media influencers

While RGS can contract with these businesses directly (with no markup), we prefer managing vendors that work on the project and bill directly to VSD outside of the project budget.

SOCIAL MEDIA AND PUBLIC RELATIONS SERVICES

PROPOSED METHOD FOR ACCOMPLISHING WORK

TASK 1: ACCOUNT MANAGEMENT

Task 1	Deliverables
a. Monthly strategy sessions	12 Meeting agendas and notes
b. Media monitoring	Captured media clips and stories
c. Translation	Spanish translations
d. 12-month calendar	12-month calendar
e. Strategic communications plan	Strategic communications plan
f. Policy & procedure updates	Updated policies and procedures
g. Crisis response & recommendations	Crisis component of strategic communication plan

Approach for Task 1

RGS will provide Valley Sanitary District with a well-organized, timely and outcome-driven approach. Our team will work to streamline efforts and reduce redundancy starting with the planning efforts to maximize RGS effectiveness throughout the contract. The RGS team is familiar with VSD, sanitation agencies and two of our team members are longtime Coachella Valley residents who bring a wealth of knowledge of and connections in the community.

Planning materials will be simple, focused and developed with usability in mind. RGS prides itself on high-level customer service and will be flexible and responsive to VSD's needs and requests. All deliverables allow for a round of staff review with RGS to incorporate edits.

Additional crisis response services can be provided on-demand at \$176 per hour. Pricing crisis communications response in this manner will provide the best return to VSD given that the demands of crises are volatile and uncertain. RGS is also willing to explore a reduced scope of work to meet VSD budgetary needs.

SOCIAL MEDIA AND PUBLIC RELATIONS SERVICES

TASK 2: COMMUNITY OUTREACH

Task 2	Deliverables
a. Monthly newsletter	8 digitally delivered newsletters
b. Content gathering	Photography/videography (optional)*
c. Media outreach	Website content
d. Community updates	Materials for community events
e. Evaluate existing efforts	Advertisements Assessment component of strategic communication plan

TASK 3: PUBLIC RELATIONS

Task 3	Deliverables
a. Strategy & campaign development	Press releases and media advisories
b. Event awareness	News coverage clips
c. Document development	Survey and results (optional)*
d. General awareness	Customer onboarding procedure
e. Customer onboarding	
f. Misconception management	
g. Media relations	

SOCIAL MEDIA AND PUBLIC RELATIONS SERVICES

TASK 4: SOCIAL MEDIA

Task 4	Deliverables
a. Staff guidance & training	Social media procedures
b. Creative development	Social media policy
c. Content development	Social media posts
d. Executing social media*	Social media component of strategic communication plan

Approach for Tasks 2, 3, and 4

RGS envisions Task 2 being developed in close conjunction with Tasks 3 and 4. Much of the content will cross vehicles and audiences. Aligning these tasks will streamline RGS hours and VSD reviews. RGS will begin with evaluating existing efforts and will leverage the calendar, plan and recommendations developed in Task 1 to inform efforts in Tasks 2, 3 and 4.

RGS plans to identify key opportunities for media outreach and leverage existing connections in the local market to gain traction for meaningful, positive stories for VSD.

For VSD-owned channels (newsletter, website, social media, documents), RGS will create compelling content that reinforces VSD mission and vision and increases both general awareness, engagement, and public satisfaction. RGS will use deliverables from Task 1 to ensure these resources are maximized and to limit the amount of time VSD staff needs to spend on reviews.

RGS has also included several additional optional items in the budget for these tasks. Please note that RGS does NOT markup hard costs:

- Polling/research to get a strong pulse on the community to inform efforts during the contract term and to optimize the Centennial Celebration.
- Photography and videography to ensure the most engaging content for community, social and media outreach. RGS envisions facilities and staff photography plus drone and traditional video clips. These elements can also be leveraged later for the Centennial Celebration.
- Advertising/sponsorship budget to help increase awareness of VSD, its work and successes.

SOCIAL MEDIA AND PUBLIC RELATIONS SERVICES

- Promotional items to share with new customers. (e.g., a VSD magnet with a 2024 calendar)
- Executing social media. RGS team members would get credentials to make/schedule the social media posts so that VSD staff does not have to.
- Paid promotion for social media content. This could be ads and/or sponsored content on Facebook, LinkedIn, Nextdoor, etc.

TASK 5: MONTHLY REPORTS

Task 5	Deliverables
a. Monthly report development	12 monthly reports
b. Community Engagement Committee	Meeting materials for 6 meetings

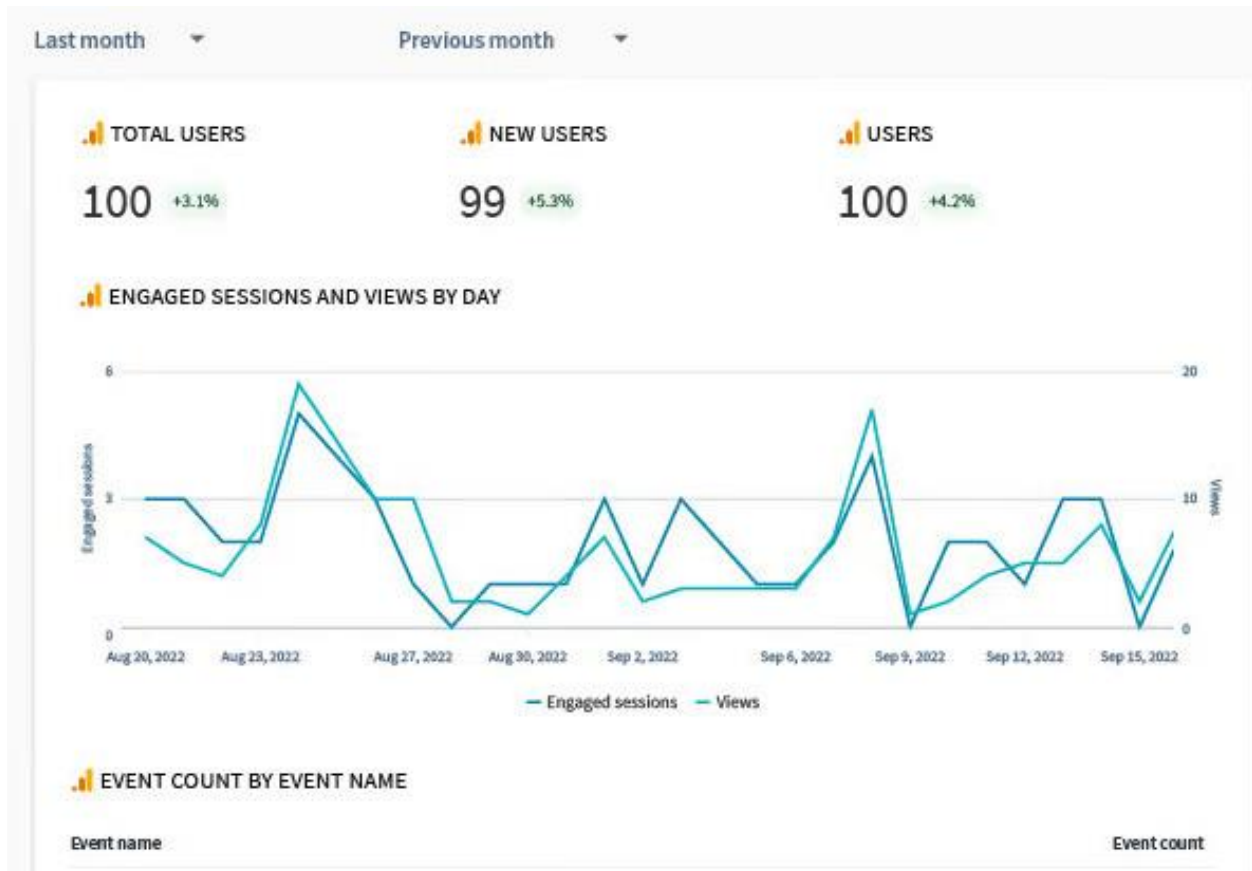
Approach for Task 5

RGS will analyze current analytics and reporting methods and implement any additional tracking tags or applications needed to provide comprehensive monthly reports to demonstrate project value, successes, and opportunities. Reporting template will be a collaboration between RGS and VSD to ensure measurement of important KPIs and other analytics.

RGS will prepare for, attend, and present at the Community Engagement Committee (CEC) as directed by staff.

RGS has added an additional optional scope item (5c) if VSD would like RGS to facilitate involvement and a single round of CEC review in developing planning and policy documents outlined in Task 1, 4 and 6. RGS has also built in an additional optional scope item to accommodate CEC review of select outreach elements (advertisement/social campaign elements, centennial campaign branding, etc.)

SOCIAL MEDIA AND PUBLIC RELATIONS SERVICES



Example of Analytics Dashboard

SOCIAL MEDIA AND PUBLIC RELATIONS SERVICES

TASK 6: PUBLIC OUTREACH MUSEUM DISPLAY VIDEO PRESENTATION

Task 6	Deliverables
a. Video planning	3-5 minute video with interviews
b. Video shoot	Shorter 15-30 second video clips for social
c. CWEA submission	CWEA submission materials
d. Video distribution	Video distribution plan

Approach for Task 6

RGS will coordinate with its video subcontractor, the Coachella Valley History Museum and VSD staff to coordinate a video shoot, including interviews. The shoot will capture the museum installation, a historian and VSD Board members or executives.

As its first effort on this project, RGS will quickly develop several concepts for VSD to select from, develop the script, coordinate the logistics of the shoot and be present to direct the shoot. RGS will also work closely with the video subcontractor to ensure that the editing schedule is expedited to allow for a timely CWEA award submission. Given the tight turnaround, RGS will coordinate with all parties that require review simultaneously.

TASK 7: CENTENNIAL CELEBRATION

Task 7	Deliverables
a. Campaign development	Centennial brand guidelines
b. Partnership opportunities	Centennial tactical communications plan
c. Centennial brand development	Draft events/programs list
d. Schedule of events/programs	Centennial event plan

SOCIAL MEDIA AND PUBLIC RELATIONS SERVICES

Approach for Task 7

RGS will coordinate with VSD staff, executives, and Board Members to develop the key objectives and desired outcomes from the Centennial Celebration. After the preliminary information-gathering phase, the RGS team will develop list of events and programs and tactical communications plan. A set of guidelines will be developed for VSD to ensure a consistent brand application for its centennial.

RGS intends to leverage deliverables from other tasks to help create an engaging campaign brand that reflects the proud legacy of VSD, its current mission and its vision for the future.

RGS will also support VSD with efforts to identify and attract key partners in celebrating this milestone. RGS will also look for ways to further leverage existing partnerships, like that with Coachella Valley History Museum. Additional items in consideration from VSD staff are not included in the RGS budget (other events, web development and video series) because those items would significantly impact the budget. RGS will work with the VSD team to refine its vision and provide pricing once those elements are confirmed.

RGS will coordinate with VSD staff on giveaway/promo items for the event (magnets, water bottles, pens, etc.) and work with VSD staff to place an order in early 2025 reserving stock for the November 2025 event. RGS recommends ordering branded T-shirts for all event staff and getting VIP promo items for special guests (hats, mugs, premium bottles, etc.).

On the day of, all event staff will have a comprehensive schedule of events that has been reviewed and vetted with the VSD team well in advance. RGS will coordinate an all-hands event planning meeting roughly a week prior to the event.

RGS will plan to coordinate with VSD to leverage 6-8 members of the VSD team to help with event support and plans to include 2 RGS team members on the day of the event. RGS will manage media relations leading up to and at the event. RGS will coordinate with VSD to identify and prepare a spokesperson for the event. RGS aims to get coverage leading up to the event to drive people to the event and also coverage of the event.

RGS will coordinate with VSD to select vendors to provide refreshments and additional services (photobooth, live music, face painting, etc.) these vendors will be approved and paid directly by VSD. RGS will develop recommendations for family-friendly activities (corn hole, crafts, chalk art, giant bubbles, etc.) to attract visitors and market the program using local social media parenting groups. Hard costs for these program elements are not included in the proposal as required elements but are estimated as recommended additional costs.

SOCIAL MEDIA AND PUBLIC RELATIONS SERVICES

PROJECT SCHEDULE

Tasks	2023/2024											
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Task 1: Account Management												
a. Monthly strategy sessions	•	•	•	•	•	•	•	•	•	•	•	•
b. Media monitoring												
c. Translation												
d. 12-month calendar		•										
e. Strategic communications plan		•										
f. Policy & procedure updates				•								
g. Crisis response & recommendations		•										
Task 2: Community Outreach												
a. Monthly Newsletter			•			•	•	•	•	•	•	•
b. Content gathering												
c. Media outreach												
d. Community updates												
e. Evaluate existing efforts		•										
Task 3: Public Relations												
a. Strategy & campaign development		•										
b. Event awareness												
c. Document development												
d. General awareness												
e. Customer onboarding												
f. Misconception management												
g. Media relations												
Task 4: Social Media												
a. Staff guidance & training				•								
b. Creative development												
c. Content development												
d. Executing social media*												
Task 5: Monthly Reports												
a. Monthly report development												
b. Community Engagement Committee	•		•		•		•		•		•	
Task 6: Public Outreach Museum Display Video Presentation												
a. Video planning												
b. Video shoot												
c. CWEA submission	•											
d. Video distribution												

*	<i>Additional RGS-identified scope item</i>
•	<i>Definitive deliverable</i>

SOCIAL MEDIA AND PUBLIC RELATIONS SERVICES

	2024/2025																
	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Task 7 Centennial Celebration																	
a. Campaign development	█	█	█	█													
b. Partnership opportunities							█	█	█	█	█	█	█	█			
c. Centennial brand development		█	█	█	█	█											
d. Schedule of events/programs									█	█	█	█	█				
e. Day of services/logistics											█	█	█	█	█	█	
f. Media relations															█	█	█

CERTIFICATION OF PROPOSAL

The undersigned submits its proposal and, by doing so, agrees to furnish services to Valley Sanitary District in accordance with the Request for Proposal and to be bound by the terms and conditions of the RFP with requested exceptions to CSD's standard agreement included in **Appendix B** of this submittal.



Sophia Selivanoff, Executive Director
REGIONAL GOVERNMENT SERVICES

APPENDIX A – RESUMES



Ashley Metzger

Strategic Services Consultant – Communications and Engagement

Ashley Metzger joined Regional Government Services (RGS) as a Senior Advisor in the Communications and Engagement Service Group in 2022. She has extensive professional experience in communications, board affairs and strategy, project and program management, media relations, branding, and supervision and provides communications and engagement services both within organizations and in the community.

Ms. Metzger holds a master's degree in politics and a bachelor's degree in American government and politics. She is the vice chair of the Public Affairs Committee in the National Water Resources Association (NWRA) and the past vice chair of the Communications Committee in the Association of California Water Agencies (ACWA).

PROFESSIONAL EXPERIENCE

REGIONAL GOVERNMENT SERVICES

Senior Advisor – Water Resources

Ms. Metzger provides services for RGS partner agencies in strategic planning, website development, and staff and community engagement.

DESERT WATER AGENCY, PALM SPRINGS

Director of Public Affairs and Water Planning

Ms. Metzger oversees water resources, conservation, outreach and GIS, represents the agency at the State Water Contractor, Delta Conveyance Project and Sites Reservoir meeting. She supervises internal and external communications and develops and oversees the annual budget.

Outreach and Conservation Manager

Ms. Metzger developed and executed outreach and produced customer and media materials with compelling messaging to support agency operations and programs. She conducted interviews with media outlets and analyzed and made recommendations on outreach and conservation best practices. In addition, she maintained the agency website and conducted legislative research.

CV STRATEGIES

Account Executive

Ms. Metzger served as the lead for renewable energy clients including the world's largest photovoltaic solar facility. She worked for water agencies across California on a variety of issues including rate restructuring, water quality issues, and customer service training.



Joan Pliego

Senior Advisor – Communications and Engagement

Joan Pliego joined Regional Government Services as a Senior Advisor in the Communications and Engagement Service Line. She has over fifteen years' experience in leading communications and public engagement for municipal and county government.

Her expertise includes preparing and publishing communications, online content, and public education materials for projects related to governance, elections, planning, community and economic development, public works, parks, sustainability, and public safety.

Ms Pliego's public engagement experience includes facilitating meetings, workshops, public hearings, and retreats, and planning events such as town hall meetings and public facility grand openings. She has experience with marketing communications, brand development, graphic design management, and website redesigns focusing on content integrity and accessibility.

As a FEMA-certified Public Information Officer, Ms. Pliego has supported police, fire, and emergency management departments with media interaction, public safety alerts, emergency operations center communications, and public safety education campaigns.

Ms. Pliego holds a bachelor's degree in history, holds a Digital Communications Certificate and is pursuing a Global Pathways Certificate in Public Participation.

PROFESSIONAL EXPERIENCE

REGIONAL GOVERNMENT SERVICES

Senior Advisor – Communications

Ms. Pliego provides copywriting, media relations, outreach, project management, and public information services for RGS partner agencies.

GORDLEY GROUP, ARIZONA

Community Relations Project Manager

Ms. Pliego creates public engagement plans for clients, writes a variety of constituent communications and collaborates with organization staff to improve strategic communications plans, public engagement, and brand guidelines.

COCONINO COUNTY, ARIZONA

Interim Communications Director and Public Information Officer

Ms. Pliego served as communications department director, Public Information Officer, and media liaison. She managed the Emergency Operations Center communications and staff and prepared for flood and wildfire response.

CITY OF SNOQUALAMIE, WASHINGTON

Communications Manager and Public Information Officer

Ms. Pliego served as city spokesperson, media liaison, and public information officer. She developed and managed long-term strategic communications, marketing, and public outreach plans as well as communications in Emergency Operations Center during floods, fires, and major highway closures. She also coordinated relationships with local and regional media and local tribal government.

CINGULAR WIRELESS, WASHINGTON

Marketing Communications Manager

Ms. Pliego developed marketing collateral for nationwide sales presentations, coordinated focus groups, and partnered with the corporate communications team to integrate the corporate brand across divisions.

AT&T WIRELESS, WASHINGTON

Employee Communications Coordinator

Ms. Pliego wrote and edited content for the employee services intranet, Human Resources newsletter, and benefits brochures, worked in partnership with a corporate communications team to align employment and corporate brands, and participated in a long-term campaign to transition 60,000+ AT&T and Cingular employees during an acquisition.



Casey Dolan

Senior Advisor – Communications and Engagement

Casey Dolan joined Regional Government Services (RGS) as a Senior Advisor in the Communications Service Group in 2023. Mr. Dolan has over twenty years' professional experience in broadcast and digital media, creating and managing content as well as website development, social media management, search engine optimization, display and search advertising, public relations, and all things digital. He delivers digital and social media projects for RGS partners.

Mr. Dolan holds a bachelor's degree in business management.

PROFESSIONAL EXPERIENCE

REGIONAL GOVERNMENT SERVICES

Senior Advisor – Communications

Mr. Dolan guides RGS partner agencies with optimization of agency websites and social media projects.

DIGITAL MARKETING CONSULTANT

Principal

Mr. Dolan managed social media, web design, and digital marketing for a host of clients and advertising agencies. His projects included conservation outreach and public education for several water agencies and a renewable energy non-profit. He also provided staff training to ensure that maintenance of agency blogs were updated and appealing to constituents.

CACTUS HUGS

Publisher

Mr. Dolan was the founder and operator of a popular news and culture website that served the Greater Palm Springs area.

KINER COMMUNICATIONS

Digital Media Director

Mr. Dolan created and managed digital and social media and web development for a host of clients in addition to handling traditional marketing, public relation needs, and event planning.

GREATER PALM SPRINGS RADIO STATIONS

Radio Host

Mr. Dolan hosted and managed highly rated morning and afternoon shows on multiple radio stations in the Greater Palm Springs area.



Eric Samuelson

Graphic Design

- Founder | Freelance Graphic Designer | Artist – Digital Art Organic [2021 – present] Pacifica, CA
- Founder | Graphic Designer – One Mind Communications [2010 - 2021] La Quinta & Oakland, CA
- Graphic Designer | Art Director – Samuelson Creative [2003 - 2010] La Quinta, CA
- Creative Director | Designer – Left Coast Group [2001 - 2003] Berkeley, CA
- Creative Director | Lead Designer – TheMan.com [1999 - 2000] San Francisco, CA
- Creative Director | Designer – Left Coast Group [1998 - 1999] Berkeley, CA
- Senior Art Director – Foote, Cone & Belding Direct West [1996 - 1997] San Francisco, CA
- Junior Art Director | Graphic Designer | J. Walter Thompson/West [1993 - 1995] San Francisco, CA
- Ad Services Supervisor | J. Walter Thompson/West [1991 - 1992] San Francisco, CA
- Ad Services Coordinator | J. Walter Thompson/West [1987 - 1990] San Francisco, CA

CLIENT HISTORY

- American Hawaii Cruises
- Aristotle Software
- Arta Health Network
- Borland International
- Boy Scouts of America
Inland Empire
- C3 Industries
- California Lottery
- CampusExplorer.com
- Cellular One
- Centers for Spiritual Living
- Palm Desert Center for Spiritual Living
- César Bar and Restaurant
- Cheskin Research
- Chez Panisse Restaurant & Café
- Chiron Corporation
- Churchill Pacific
- City of Berkeley
- City of Indian Wells
- Malawi School Project
- Marin Wine Vaults
- McClellan Lighting Gallery
- Meals on Wheels of SF
- Multivox Technologies
- Musicians Against Aids
- Nature’s Healing Place
- Nestlé
- Netcom
- Netscape
- Oasis Fitness
- Pacific Partners International
- PPI Golf
- Preferred Plumbing, AC & Heating
- Professional Club Placement Services
- PTS Intertech
- Quantum Event Hosting
- Renova Solar
- Roberts Consulting Group

- Club Mark Corporation
- Commerce West Insurance
- Computer Associates
- Copier Careers
- Cowgirl Creamery
- Custom Vintage Wine Cellars
- Desert Diva Boutique
- Desert Saje Natural Wellness
- Discovery Channel Multimedia
- Disney Interactive
- Earth Witch Gardening
- East Bay Regional Parks District
- East Bay Youth Orchestras
- Essilor
- Excite
- Fineman PR
- Gary Kott's Creative Warehouse
- Gas Station Exchange
- GE Capital
- Global Truth Network
- Goldwyn Golf
- GraphTek
- Harbinger Sports
- Health Empowerment Enterprises,
Conference for Healthy Living
- Homegrown Records
- Indian Wells Chamber of Commerce,
Challenge Cup
- Indian Wells Golf Resort
- Kaiser Permanente
- Kodak
- Levi Strauss
- Lexis Publishing
- Looksmart
- Mail.com
- San Jacinto Valley Academy
- SafeHouse of the Desert
- Salesforce.com
- Scotty's Home Care
- Seabourn Cruise Line
- Silex Vineyards
- Sport Vision
- Sprint
- Stuart Anderson's Restaurants
- Sun Microsystems
- Supercuts
- SwimCool Systems
- Sylmark
- TechProse
- TheMan.com
- The Research Trust
- Three Dog Bakery
- Total Meeting Solutions
- Tour de Palm Springs
- Transmeta Corporation
- Turnkey Hospitality
- US Coast Guard
- Varilux
- Varsity Marketing
- Ventaso
- Vidius
- Visit Oakland
- Weider Publications, Flex and Muscle
& Fitness Magazines
- Western Medical Management Group
- Western Pioneer Insurance
- White Shark Imports
- Zoot Hawaii

EDUCATION

B.A. English – University of Virginia (1987) Charlottesville, VA



Maura Griffin

Administrative Support – Human Resources

Maura Griffin joined Regional Government Services (RGS) in 2019. She contributes her professional administrative and creative skills both to partner agencies and RGS' internal departments. Ms. Griffin's graphics skills apply to many aspects of RGS' services, especially her expertise with Microsoft Publisher, Canva, and Adobe Creative Suite and social media marketing. Recently, Ms. Griffin has been producing music videos for social media.

Prior to joining RGS, Ms. Griffin had extensive administrative and creative experience in the private sector, primarily in real estate sales. Her work included contract drafting, negotiations, marketing research, and client analysis. She is transferring these skills and knowledge to serve RGS partner agencies.

Ms. Griffin has a B.A. in Fine Arts and a certification in French from the Sorbonne.

PROFESSIONAL EXPERIENCE

REGIONAL GOVERNMENT SERVICES

Administrative Support

Ms. Griffin serves as Administrative Assistant to the Marin Emergency Radio Authority (MERA), a JPA that provides a countywide emergency radio system throughout Marin County. Working closely with multijurisdictional police and fire departments and other Marin County agencies, she provides administrative support such as recording board minutes and providing content support and graphics to MERA's social media platforms.

In addition, Ms. Griffin serves on several teams in RGS serving our partner agencies. On the Recruitment Team, she coordinates social media campaigns including producing videos to publicize agencies' staff and management openings. On the Communication and Outreach Team, she provides social media expertise to several agencies.

KELLER WILLIAMS WINE COUNTRY

Licensed Realtor

As a licensed realtor, Ms. Griffin managed sales and marketing activities, transaction and escrow processes, and prepared contracts, purchase agreements, and leases.

BERTOLONE REALTY

Office Manager/ Transaction Coordinator

Ms. Griffin was responsible for overseeing office processes as well as marketing and accounting. She also served as the liaison between agents, brokers, and title companies to ensure that documents were accurate and submitted within the required deadlines.

BERTO GROUP

Transaction Coordinator/ Inside Sales Agent

Ms. Griffin was responsible for overseeing all aspects of real estate transactions, preparing listing materials and MLS listings, obtaining necessary signatures, coordinating showings, communicating with sellers, organizing all documents for file compliance, and maintaining client database and transaction management systems.



Matthew Jadrich

Technical Specialist – Communications and Engagement

Matthew Jadrich joined Regional Government Services (RGS) as a Technical Specialist serving the JPA in 2018. He is a highly skilled project manager and team leader with extensive background in oversight of technical and logistical projects in diverse business environments. In addition to overseeing the technical aspects RGS communications and outreach, Mr. Jadrich serves as a Communications Specialist for RGS partner agencies.

TECHNICAL PROFICIENCIES

Platforms: Windows, Mac OS 10-7, Adobe Connect, Zoom, RingCentral

Tools: Adobe Suite, Canva, CivicPlus, Streamline, WordPress, Oracle, Microsoft Office Suite

LinkedIn Credentials:

- Marketing Analytics: Presenting Digital Marketing Data
- Content Marketing Foundations
- Content Marketing: Newsletters
- Write Marketing Copy
- Write for the Web
- Marketing During a Crisis

PROFESSIONAL EXPERIENCE

REGIONAL GOVERNMENT SERVICES

Communications Specialist

Mr. Jadrich provides communications services such as facilitating production of the monthly agency newsletter, managing RGS presence on LinkedIn, coordinating marketing outreach. In addition, he provides technical hosting for RGS Training and Development sessions and completes agency website work.

IBM/RATIONAL SOFTWARE/PURE ATRIA/PURE SOFTWARE

Supplier Base Manager

Senior Buyer/Planner

Materials Planner/Buyer

Mr. Jadrich oversaw the global lead management lead management logistics program for the Marketing Operations group. He established and maintained best practices of product release, procurement, inventory management, and customer shipments through leverage of Oracle 11i platform and provided logistical project management support to cross-functional teams.

He introduced performance measurement metrics to track cost and return-on-investment data and improved delivery of materials and services to customers.

CANNERY ROW ANTIQUE MALL

Supervisor/ Antique Dealer

Mr. Jadrich supervised the daily business activities of 100 dealers and ten staff members and manages the cash drawer, daily deposits, and shipping estimates. He appraises merchandise and offers it for resale with an average monthly volume of \$80,000. He provides technical support to the dealership and conceived and implemented a proprietary inventory system.

CHUCK EVEY ELECTRICAL

Electrician Apprentice

Mr. Jadrich provided electrical services in residential and commercial environments. He repaired and replaced wiring, equipment, and fixtures ensuring work followed all relevant codes.

APPENDIX B – EXCEPTIONS TO THE PSA

EXCEPTION TO TERMS

SECTION 12. INDEPENDENT CONTRACTOR

Ads second paragraph —

District shall not have the ability to direct how services are to be performed, specify the location where services are to be performed, or establish set hours or days for performance of services, except as set forth in this Agreement. Further, District confirms that Consultant employees are not assuming and are not expected to assume any District staff position(s).

SECTION 13. INSURANCE

SUBSECTION A. (VI) Amend as follows:

The general liability program may utilize either deductibles or provide coverage excess of a self-insured retention, ~~subject to written approval by the District, and~~ provided that such deductibles shall not apply to the District as an additional insured.

SUBSECTION B. (IV) Amend as follows:

Subject to approval by the District, the automobile program may utilize deductibles, provided that such deductibles shall not apply to the District as an additional insured, ~~but not a self-insured retention.~~

- SUBSECTION F.

Amend as follows:

Prior to ~~execution of starting work on~~ the Agreement, the Consultant shall file with the District evidence of insurance from an insurer or insurers certifying to the coverage of all insurance required herein.

*Please note that RGS carriers' will not issue evidence of coverage that includes an additional insured endorsement until an agreement has been executed. We have included a sample Certificate of Insurance here of your information.

- **SUBSECTION H (I) (1) QUALIFYING INSURERS**

Amend as follows:

Add to the end of the paragraph —

Alternatively, if Consultant is a public agency it can, pursuant to California Government Code Section 990, satisfy the insurance requirements set forth herein with a combination of self-insurance and self-insured pool insurance.

SECTION 14 – INDEMNIFICATION

Amend as follows:

a. To the fullest extent permitted by law, Consultant shall defend (with counsel ~~of reasonably acceptable to District's choosing~~) ~~against third party claims~~, indemnify and hold the District, its officials, officers, employees, volunteers and agents free and harmless from any and all claims, demands, causes of action, costs, expenses, liability, loss, damage or injury of any kind, in law or equity, to property or persons, including wrongful death, in any manner ~~to the extent~~ arising out of, pertaining to, or incident to any alleged ~~negligent~~ acts, errors or omissions, or willful misconduct of Consultant, its officials, officers, employees, subcontractors, consultants or agents in connection with the performance of the Consultant's services, the Project or this Agreement, including without limitation the payment of all expert witness fees, ~~reasonable~~ attorneys' fees and other related costs and expenses. Consultant's obligation to indemnify shall not be restricted to insurance proceeds, if any, received by the Consultant or the District, its officials, officers, employees, agents or volunteers. ~~Notwithstanding the foregoing and for the avoidance of doubt, nothing herein shall be interpreted as obligating Consultant to indemnify District against its own negligence or willful misconduct.~~

SECTION 18. TERMINATION, SUBSECTION B

Amend as follows:

b. Consultant may terminate its obligation to provide further services under this Agreement upon 30 calendar days' written notice to District. ~~only in the event of substantial failure by District to perform in accordance with the terms of this Agreement through no fault of Consultant.~~



Valley Sanitary District

DATE: October 10, 2023
TO: Board of Directors
FROM: Tino Tijerina, Facility Maintenance Supervisor
SUBJECT: AUTHORIZE THE GENERAL MANAGER TO EXECUTE A ONE-YEAR CONTRACT FOR LANDSCAPE AND LAWN CARE SERVICES FOR AN AMOUNT NOT TO EXCEED \$19,896.36

Suggested Action

Approve

Strategic Plan Compliance

GOAL 3: Excellent Facilities

Fiscal Impact

The fiscal impact will be \$19,896.36 and this is within the current approved FY 23/24 budget.

Environmental Review

This does not qualify as a project for the purposes of CEQA.

Background

It is necessary to request competitive quotes from vendors, suppliers, and service providers to ensure that Valley Sanitary District receives the highest quality services at the best available rates. The Board of Directors and Staff have determined that a competitive process should be completed approximately every 3 years.

Staff prepared a Request for Proposals for lawn care services that generally includes cutting grass, planter bed maintenance, and tree trimming.

On August 16, 2023, a Request for Proposals (RFP) was issued through our online procurement portal OpenGov.

On September 14, 2023, five proposals were received by the posted deadline. The proposals were first evaluated to ensure that all the required information/documentation was properly submitted with the

proposal. The properly submitted proposals were then sent to a panel for review and scoring. The proposals were evaluated on the following categories utilizing a 100-point scoring system:

1. Understanding of Project and Project Approach - 30%
2. Scope of Work and Schedule - 25%
3. Relevant Qualifications/Experience - 25%
4. Overall Quality of Proposal - 10%
5. Cost Evaluation - 10%

The proposals were ranked in order from one through five and the evaluations are summarized below:

Vendor	Evaluator 1	Evaluator 2	Evaluator 3	Evaluator 4
Mariposa Landscapes, Inc.	97% (2)	78% (1)	95% (1)	94% (1)
Desert Arc Landscape Maintenance	100% (1)	61% (4)	85% (2)	86% (2)
Urban Habitat	86% (3)	63% (3)	82% (3.5)	82% (3)
Nissho of California	50% (5)	66% (2)	81% (5)	77% (4)
Universal Green LLC	70% (4)	48% (5)	82% (3.5)	68% (5)

Based on the panel review and scoring, Mariposa Landscapes, Inc. turned in the most complete and accurate proposal.

Recommendation

Staff recommends that the Board of Directors authorize the General Manager to execute a one-year contract with Mariposa Landscapes, Inc. for Landscaping and Lawn Cares Services in an amount not to exceed \$19,896.36.

Attachments

- [Landscape Evaluation Tabulation Report.pdf](#)
- [Mariposa Landscapes.pdf](#)
- [Desert Arc.pdf](#)
- [Urban Habitat.pdf](#)



EVALUATION TABULATION
RFP No. 2023-RFP-011
Landscape & Lawn Care Services

RESPONSE DEADLINE: September 14, 2023 at 4:00 pm

Thursday, September 28, 2023

PHASE 1

EVALUATION CRITERIA

Criteria	Scoring Method	Weight (Points)
Understanding of Project and Project Approach	Points Based	30 (30% of Total)

Criteria	Scoring Method	Weight (Points)
Scope of Work and Schedule	Points Based	25 (25% of Total)

Criteria	Scoring Method	Weight (Points)
Relevant Qualifications/Experience	Points Based	25 (25% of Total)

Criteria	Scoring Method	Weight (Points)
Overall Quality of Proposal	Points Based	10 (10% of Total)

Criteria	Scoring Method	Weight (Points)
Cost Evaluation	Points Based	10 (10% of Total)

AGGREGATE SCORES SUMMARY

Vendor	Evaluator 1	Evaluator 2	Evaluator 3	Evaluator 4
Mariposa Landscapes, Inc.	97% (2)	78% (1)	95% (1)	94% (1)
Desert Arc Landscape Maintenance	100% (1)	61% (4)	85% (2)	86% (2)
Urban Habitat	86% (3)	63% (3)	82% (3.5)	82% (3)
Nissho of California	50% (5)	66% (2)	81% (5)	77% (4)

EVALUATION TABULATION
RFP No. 2023-RFP-011
Landscape & Lawn Care Services

Vendor	Evaluator 1	Evaluator 2	Evaluator 3	Evaluator 4
Universal Green LLC	70% (4)	48% (5)	82% (3.5)	68% (5)

Vendor	Total Score	Total Average Rank
Mariposa Landscapes, Inc.	91%	1.25
Desert Arc Landscape Maintenance	83%	2.25
Urban Habitat	78.25%	3.13
Nissho of California	68.5%	4
Universal Green LLC	67%	4.38

VENDOR SCORES BY EVALUATION CRITERIA

Vendor	Understanding of Project and Project Approach Points Based 30 Points (30%)	Scope of Work and Schedule Points Based 25 Points (25%)	Relevant Qualifications/Experience Points Based 25 Points (25%)	Overall Quality of Proposal Points Based 10 Points (10%)
Mariposa Landscapes, Inc.	90%	95%	92%	95%
Desert Arc Landscape Maintenance	81.7%	82%	92%	85%
Urban Habitat	79.2%	79%	89%	80%
Nissho of California	66.7%	67%	77%	65%
Universal Green LLC	58.3%	77%	82%	60%

Vendor	Cost Evaluation Points Based 10 Points (10%)	Total Score
Mariposa Landscapes, Inc.	77.5%	91%
Desert Arc Landscape Maintenance	65%	83%
Urban Habitat	45%	78.25%
Nissho of California	60%	68.5%
Universal Green LLC	37.5%	67%

Landscape Maintenance Request for Proposal



Landscape & Lawn Care Services 2023-RFP-011

Bid Due: September 14, 2023, 4:00 pm



M A R I P O S A
L A N D S C A P E S I N C

M A R I P O S A L A N D S C A P E S I N C

September 14, 2023

Cover Letter

Valley Sanitary District
Attn: Holly Gould , Clerk of the Board
45500 Van Buren Street
Indio, CA 92201
(760) 238-5400 Ext: 135.
hevans@valley-sanitary.org

RE: Request for Proposal, Landscape Maintenance

Mariposa Landscapes, Inc. has continuously been in business since 1977. Growing from a single truck in Rosemead, California to a fleet of trucks and equipment with 800 employees covering all Southern California and Arizona, including the Coachella Valley areas. With over 95 awards for project excellence, we take pride in the quality of our work and thrive on keeping our company as one of the most recommended in the industry. Our steady record of customer satisfaction has allowed us to maintain positive relationships with our clients.

We bring decades of knowledge and in-depth experience to every landscape entrusted to our care. Building long-lasting relationships with our clients is important to us. We understand and respect Valley Sanitary District's goals and do everything in our power to assure the well-being of your property.

We value open, honest communication, ongoing staff training, and new methods and technologies that will help us do the best job possible. While we always appreciate the accolades we receive, seeing our customers enjoy a well-executed and thriving landscape is still the most rewarding part of our work.

Contact person:
Company: Mariposa Landscapes, Inc.
Name: Dave Widjaja, Chief Estimator
Email: dave.widjaja@mariposa-ca.com
Phone No.: (626) 960-0196 Ext. 2726
Fax No.: (626) 960-8477

Mariposa would be honored to work for you and beautify your property to its ultimate potential.

Sincerely,



Antonio Valenzuela – Vice President of Operations



TEL 800 • 794 • 9458 • FAX 626 • 960 • 8477 • www.mariposa-ca.com
6232 SANTOS DIAZ ST., IRWINDALE, CA 91702 • CA CONTRACTOR'S LIC # 592268 A, C-27, D-49, C-61, C-31

Our Core Values – Safety • Teamwork • Quality • Integrity

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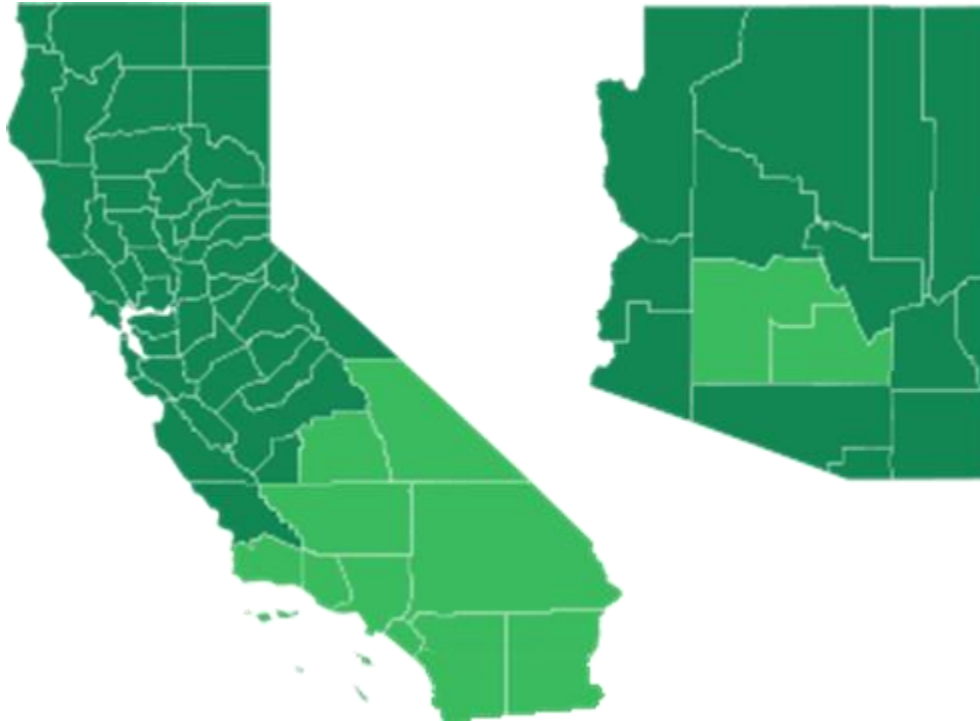
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*“We blend Nature and Craftsmanship
to create ultimate outdoor settings and extremely
satisfied customers”*



Introduction

Mariposa is a landscape contractor working in both Southern California and Arizona. With our staff experience dedicated professionals, we have developed a long history of excellence performing work on hundreds of landscape construction, maintenance and tree care projects.



Current areas of operation.

Highlights

- Over 45 years in business
- Contractor's license in two states
- Over 800 employees
- Insured – \$1 million workers comp, \$10 million in aggregate general liability limit
- \$100 million in bonding capacity
- Over 95 awards for project excellence



Company Values



Safety This is the primary foundation of our company. We emphasize “safety first” on every worksite and in all our training programs. Our employees are taught to be aware of, and responsible for, safety at all times. We strive to prevent injuries and accidents, as well as provide a safe environment for staff and customers alike.

Teamwork We work together, seeking input from all team members to organize our efforts for the greater good. We always remain open to change, embracing new methods and techniques to achieve the highest levels of quality and efficiency. We are considerate of team members, provide support, and encourage their growth, resulting in the ultimate outcome for the team.

Quality We are committed to bringing the best possible quality for our customers and their properties and projects. We provide prompt service, expert workmanship, and superior products. We take pride in meeting or exceeding expectations. Our ultimate goal is to deliver excellent value for our clients’ investment.

Integrity We are honest and open in our communications, building deep trust and confidence in all of our relationships. We value the dedication and contribution of each person. The overall well-being of our employees, customers and vendors is important to us.



Proposer Identification

Legal Name: Mariposa Landscapes, Inc.
Street/Mailing Address: 6232 Santos Diaz St., Irwindale, CA 91702
Telephone Number: (626) 960-0196
Fax Number: (626) 960-8477
Proposal Contact Email Address: dave.widjaja@mariposa-ca.com
Proposal contact: Dave Widjaja

President: Terry Noriega
California Corporation: C1469653
California Employer ID: 368-4753-1
Date Incorporated: January 26th, 1981

Licenses & Certificates

<i>Contractors State License:</i>	592268	C27, A, C61/D49, C31
<i>Qualified Applicators License:</i>	103864	ABCDEFH
<i>Pest Control Adviser License:</i>	74416	ABCDEG
<i>Pest Control Business License:</i>	30977	
<i>Irwindale Business License:</i>	000538	
<i>Supplier Clearinghouse MBE:</i>	94HS0050	
<i>City of Los Angeles MBE:</i>	561730	
<i>City of Los Angeles LBE:</i>	37858	
<i>LA County MBE:</i>	89126	
<i>LA Co. Agricultural Pest Control</i>	1000279	
<i>Certified Arborist:</i>	WE-1182A	

Minority Business Enterprise

MBE Certification, File No. CCA-7150 for the City of Los Angeles, The Women and Minority Business Enterprise Clearing house has audited and verified our eligibility as a MBE pursuant to the California Public Utilities Commission General Order 156.

Financial Resources

Mariposa has been capable of meeting all financial obligations for over 45 years. A strong balance sheet supports \$100 Million bonding capacity.

Green Waste Processing Capability

Mariposa Landscapes, Inc. has a recycling program for green waste and paper products. We implement this program at our local offices and at all job sites. Mariposa currently uses hybrid vehicles and electric equipment where required. Mariposa notifies all project managers of the green initiatives prior to the award of contract.



B. Proposer Statement of Qualifications

1. Executive Summary

Mariposa Landscapes, Inc. has been in business over 45 years providing landscape maintenance services for various cities, counties, public agencies, and private companies. We are a full-service landscape company providing Landscape Maintenance, Landscape Construction, Tree Care, and Hardscape Construction services primarily in the Southern California region. In addition to the required C-27 license, we carry A, C-61/D-49, and C-31 licenses. This diversity of capabilities and proven expertise is not found with other landscape maintenance competitors.

Our attention to quality and detail is well documented. Our depth of knowledge and level of experience in our management and supervisory personnel is unmatched by competitors.

Mariposa proudly employs over 550 team members in the Southern California Region, including Certified Irrigators, Certified Landscape Techs, Certified Arborists and Pest Control Advisor/ Applicators. Mariposa owns 95% of all vehicles and equipment used in its operations. Our entire fleet of equipment is less than 5 years old and well maintained by in-house mechanics who can respond to emergencies immediately. We maintain an inventory of replacement equipment, allowing our Operations team to stay consistent with schedules. We are available 24 hours a day to address emergency call outs.

Mariposa has met every financial obligation for over 4 decades and established a corporate bonding capacity far in excess of any requirements, across all business lines. Mariposa Landscapes Inc. has never filed for bankruptcy nor has there been any litigation judgement rendered against Mariposa.

Mariposa ownership and management are professional landscape people. We embrace the best horticultural practices and are constantly looking for the most effective approach for overall successful landscape maintenance results.

We are committed to bringing the best possible quality for our customers, their properties, and projects. We provide prompt service, expert workmanship, and superior products. We take pride in meeting and exceeding expectations. Our goal is to deliver excellent value for our clients' investment. We treat each customer with extra care and attention. Our work reflects who we are, and we strive to go above and beyond to complete all projects efficiently and provide our clients with an esthetically pleasing landscape appearance which they can be proud of.

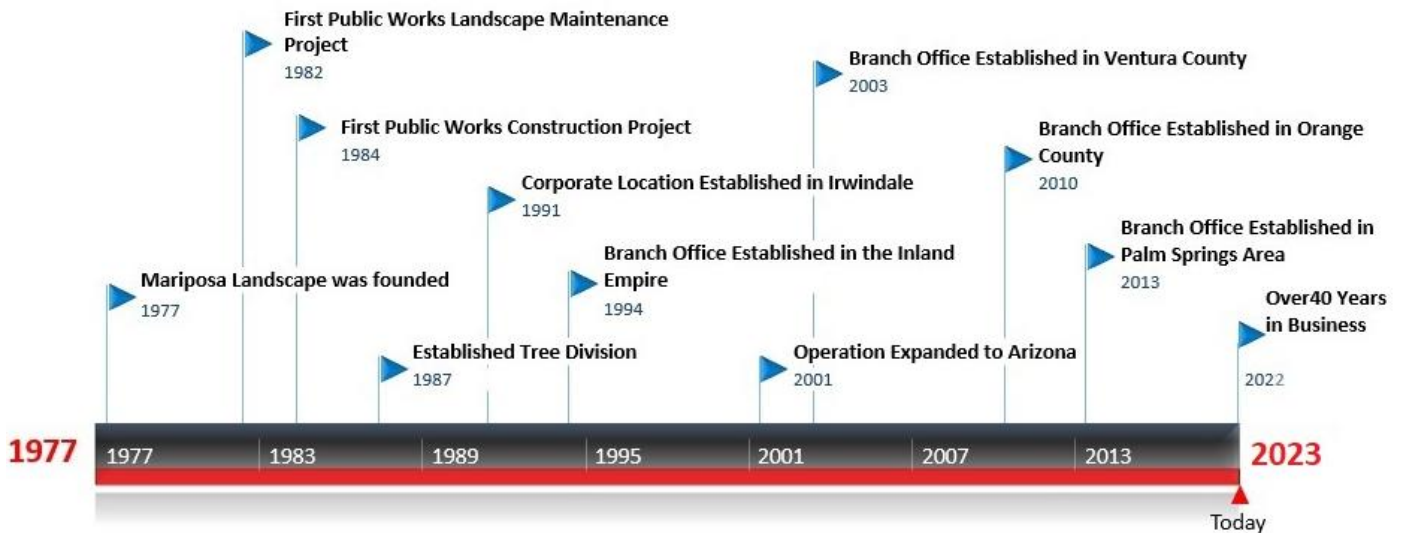
We partner with our clients to achieve a common goal. From simple to complex projects, we coordinate our vast array of expertise to create the project our clients envision. Award-winning craftsmanship, in depth knowledge and high standards of professionalism are applied at every level of work.



Office Locations

<p>Los Angeles County 15529 Arrow Highway Irwindale, CA 91706 Phone 626 960-0397 Fax 626 960-3809</p>	<p>Orange County 1107 E. Walnut St Santa Ana, CA 92701 Phone 626 960-0196 Fax 626 960-8477</p>	<p>San Bernardino County 11093 Almond Avenue Fontana, CA 92335 Phone 909 429-2546 Fax 909 429-2749</p>
<p>Riverside County 13333 S. Central Ave Chino, CA 91710 Phone 626 960-0196 Fax 626 960-8477</p>	<p>L.A. – South Bay 1650 W 130th St Gardena, CA 90248 Phone 626 960-0196 Fax 626 960-8477</p>	<p>North L.A. & Ventura 4790 E. Los Angeles Ave. Somis, CA 93066 Phone (800) 794-9458 Fax 805-386-4140</p>
<p>Palm Springs 78355 Darby Rd Bermuda Dunes, CA 92203 Phone 626 960-0196 Fax 626 960-8477</p>	<p>San Diego County 1833 Oceanside Blvd. Oceanside, CA 92054 Phone 626 960-0196 Fax 626 960-8477</p>	<p>Arizona 7677 N. 67th Avenue Glendale, AZ 85301 Phone 623 463-2200 Fax 623 463-2223</p>

Mariposa Landscapes, Inc. – Over 40 years of Excellence!



2. Qualification and Experience

A. experience, and expertise

As previously mentioned, we are committed to bringing the best possible quality for our customers, their properties, and projects. We provide prompt service, expert workmanship, and superior products. We take pride in meeting and exceeding expectations. Our goal is to deliver excellent value for our clients' investment. We treat each customer with extra care and attention.

Our nearest office is located in the City of Bermuda Dunes, just a 10 - 15-minute drive from your location. We boast dedicated crews specialized in maintaining desert landscapes and are highly proficient in turf management. Thanks to our close proximity, we can promptly respond to any emergency calls and have a team on-site within a few hours. Additionally, our dedicated account manager will be readily available to address any issues that may arise.

B Key staff (please refer to our organizational chart)

One account manager will be assigned to this project to supervise all landscape maintenance workers as well as being the point of contact for Valley Sanitary District (VSD).

Andres Perez (Account Manager), who leads our Bermuda Dunes branch office is well versed in all operations of landscape management. He has at least 25 years of experience and holds numerous licenses such as CLT, QAC, designs, etc. With Andres experiences and the management and resources provided by Mariposa, we are able to provide VSD with the best quality of service you can find within the Coachella Valley region.

Please refer to our organizational chart for Andres's full resume.

For this project we are proposing a total of 2-man crew, weekly visit, with occasional specialized crew to perform periodic tasks such as aerating and chemical applications.

C. Business experience and D. Relevant Contracts.

Mariposa Landscapes has been in business since 1977 (46 years) and has established our presence in the Coachella Valley since 1994 and a permanent branch office since 2013. Within those years, a few notable, most recent, and most relevant contracts are as follows.

City of Palm Springs – Work includes, but not limited to, landscape maintenance, tree trimming service for Facilities, parks, medians, and parkways. Duties include routine mowing, trimming, fertilization, shrubs care, and periodic/ specialized turf care.

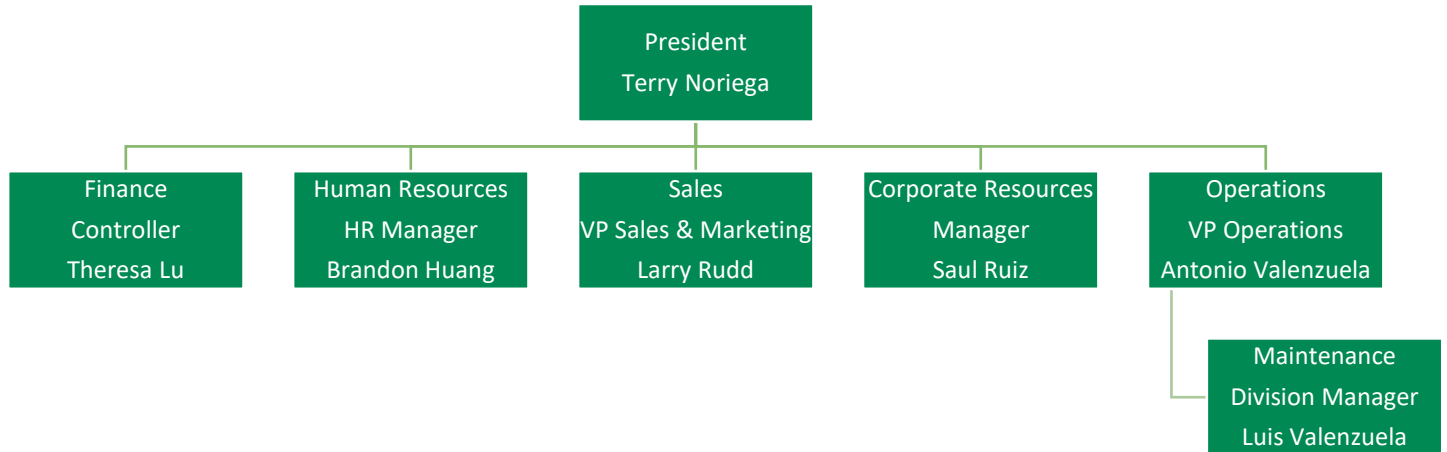
City of Palm Desert - Work includes, but not limited to, landscape maintenance, litter/ debris control, plant care, weed control, irrigation maintenance, turf care.

Coachella Valley Water District - Work includes, but not limited to, landscape maintenance, litter/ debris control, plant care, weed control, irrigation maintenance, hardscape maintenance and tree maintenance.



Corporate Organization & Experience

Management Organizational Chart



Management Staff Experience

Terry Noriega – President

- 45+ years of experience in landscape installation and maintenance
- B.S. in Ornamental Horticulture: California State Polytechnic University, Pomona
- California Contractors Licenses: C-27, A, C61/D49 and C-31
- Pest Control Advisor in 6 Categories
- Qualified Pest Control Applicator in 7 Categories
- **Certified Landscape Technician** in Ornamental and Turf Maintenance
- ISA Certified Arborist WE-1182A
- Arizona Contractor’s License: ROC178088 K-21
- Arizona Qualifying Party License: 8263
- Arizona Pest Control Business License: 8246



Antonio Valenzuela – VP Operations

- Over 30 years of experience in landscape maintenance and irrigation troubleshooting
- Pest Control Qualified Applicator in 3 Categories
- **Certified Landscape Technician** in Ornamental and Turf Maintenance
- Certified Landscape Professional
- Backflow Certification in Los Angeles County
- Landscape Water Auditor: Cal Poly SLO
- Past affiliation – Certified Playground Inspector



Larry Rudd – V.P. of Sales and Marketing

- 45 years in landscape installation and maintenance
- B.S. in Business Management, University of Phoenix
- **Certified Landscape Technician: All Categories**
- WaterSense Certified
- Arizona Certified Landscape Professional
- American Green Zone Alliance – Electric Equipment
- CPR Safety Trained
- Associate instructor Cal Poly Pomona, Cal State Fullerton



Alex Del Valle – Risk Control Manager

- Over 13 years of experience working in the safety industry
- Certified OSHA 30
- Certified AHA CPR and First Aid
- Certified Forklift Instructor



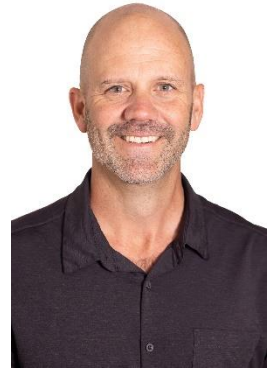
Roberto Del Valle – Safety Coordinator

- Over 16 years of experience working in the safety industry
- Certified OSHA 8, 10, 16, and 30
- Certified AHA CPR and First Aid Instructor
- Certified Forklift Instructor
- Certified Claims Adjuster



Dennis Jones – Tree Care Regional Division Manager

- Over 20 years of experience in Arbor Care
- BS Degree in Urban Forestry, Cal Poly San Luis Obispo
- International Society of Arboriculture Certified Arborist WE-5700A
- ISA Qualified Tree Risk Assessment
- TCIA Certified Tree Safety Professional 843
- Qualified Applicator License – 108771, Categories B, C & F
- Wildlife Protector Certification
- Notary Public



Luis Valenzuela – Landscape Maintenance Division Manager

- Over 25 years of experience in landscape and construction operations
- Qualified Applicator License, Category B
- **Certified Landscape Technician**, Irrigation
- ISA Certified Arborist WE-8713A
- Certification – Effective Business Leadership & Development – PDC/GCC

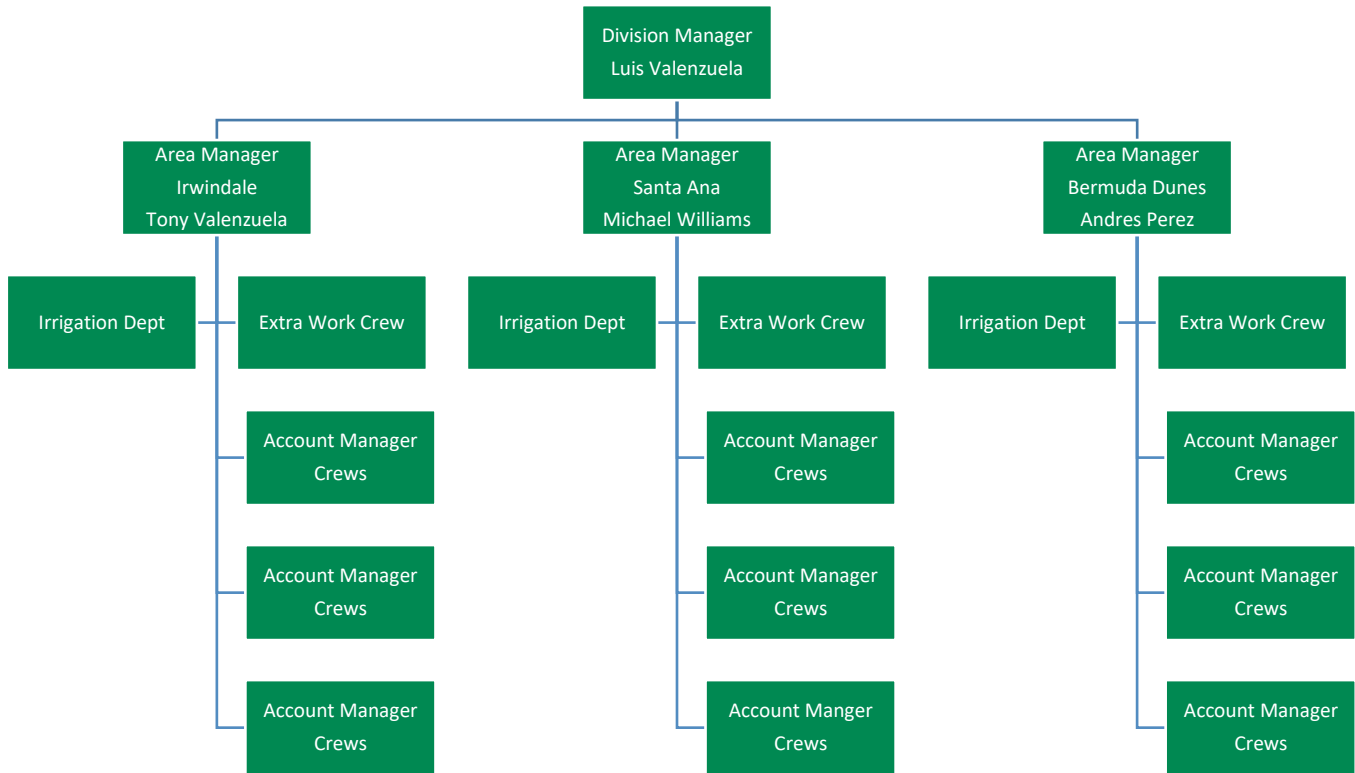


Andres Perez – Account Manager (Bermuda Dunes Area Manager)

- Over 25 years of experience in the landscape industry
- Qualified Applicator License, Category B
- **Certified Landscape Technician**, Irrigation
- Certificate – Irrigation Design
- Certificate – Irrigation Troubleshooting
- CVAG Overseeding Certificate



Maintenance Division Organization & Experience



Maintenance Operations Staff Experience

Roberto Aguilera – Account Manager

- 12 years’ experience in the Landscape Maintenance
- Internal Company Certification Landscape Irrigation Troubleshooting
- Certificate – Coachella Valley Water Management Seminar
- Certificate of completion on Reclaim Water Management
- 5 years’ experience using Calsense and Rain Bird
- Certified Landscape Technician: Ornamental Maintenance



Employee Training – CLT (Certified Landscape Technician)

The Certified Landscape Technician Test is one of the most rigorous and difficult tests to pass in any industry. It's a hands-on, timed field test that involves multiple disciplines and skills required in landscape work. There are three certifications that can be obtained from this test: Certified Landscape Technician of Landscape, Maintenance and Irrigation. Each category has specific test modules, however there is a core of 13 modules that every category applicant must pass. And passing isn't easy, with an 8% to 10% first time pass rate this is an extremely difficult test. Fortunately, applicants are allowed to retake portions of the test they didn't pass on the first try. This brings up the passing rate to 20%. Many people try to take this test and give up because it's so demanding. Following is a brief description of the test stations; each test is timed and monitored by a strict and experienced judge. Tests take place once every six months:

Core Elements

Every applicant must take these 13 elements of the test.

- 1.02 - First Aid and Safety
- 1.03 - Plan Reading
- 1.05 - Plant Identification
- 1.06 - Sod Installation
- 1.07 - Work Orders and Reports
- 1.08 - Program Controller
- 1.09 - Irrigation Identification
- 1.10 - Lateral Repair and Head Adjustment
- 1.11 - Truck & Trailer
- 1.12 - Tree Planting and Staking/Guying 1.14 - Chainsaw



Landscape Maintenance Specific Test Items

All of these test modules must be passed by those who hold the CLT-Maintenance designation.

- 3.01 - Written General Comprehension
- 3.02 - Pruning
- 3.03 - 21" Mower
- 3.04 – Intermediate Walk-Behind Mower
- 3.05 - Aerator
- 3.06 - Edger & Trimmer
- 3.07 - Riding Mower
- 3.08 - Pesticides
- 3.09 - Fertilizer
- 3.10 - Power Blower

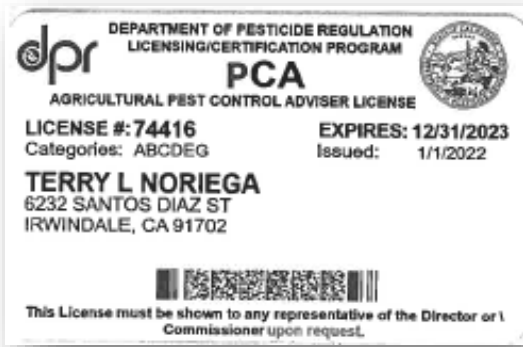
Irrigation Specific Test Items

All of these test modules must be passed by those who hold the CLT-Irrigation designation.

- 4.01 - Irrigation General Comprehension
- 4.02 - Irrigation Plan Reading
- 4.03 - Lateral Installation
- 4.04 - Mainline Installation
- 4.05 - Valve Repair
- 4.06 - Valve Wiring
- 4.07 - Pipe Installation Equipment (Riding Trencher)



3. Licenses



Arborist



The International Society of Arboriculture
Hereby Announces That
Dennis M. Jones
Has Earned the Credential
ISA Certified Arborist®

By successfully meeting ISA Certified Arborist certification requirements through demonstrated attainment of relevant competencies as supported by the ISA Credentialing Council

Caitlyn Poffhan
Caitlyn Poffhan
CEO & Executive Director

18 November 2000	31 December 2024	WE-5700AM
Issue Date	Expiration Date	Certification Number





Pest Control Business License



CALIFORNIA DEPARTMENT OF PESTICIDE REGULATION
 1001 I STREET
 SACRAMENTO, CALIFORNIA 95814

ISSUED: January 01, 2022
EXPIRES: December 31, 2023

**Pest Control Business - Main
 LICENSE**
 LICENSE NO. 30977

Invalid if insurance and/or qualified person(s) lapse before expiration date.

Mailing Address

MARIPOSA LANDSCAPES, INC.
 6232 SANTOS DIAZ ST
 IRWINDALE, CA 91702

Business Location

MARIPOSA LANDSCAPES, INC.
 15529 ARROW HWY
 IRWINDALE, CA 91706



POST THIS LICENSE PROMINENTLY IN PUBLIC VIEW
 THIS LICENSE IS NOT TRANSFERABLE - ANY CHANGE IN OWNERSHIP REQUIRES A NEW LICENSE

DIR Proof of Registration

Legal Name	Registration Number	County	City	License Type/Number(s)	Current Status	Registration Date	Expiration Date
MARIPOSA LANDSCAPES, INC.	1000005079	LOS ANGELES	IRWINDALE	CSLB:592268	Active	07/01/2019	06/30/2025



Organization Memberships & Staff Certifications

We are dedicated to having the best-trained workforce in the industry. As members of the California Landscape Contractors Association, we participate in the training programs offered by this industry organization. The CLCA originally created a rigorous “hands-on” test administered under actual field conditions. With only a 20% first time pass rate, only the best workers are able to obtain the designation of CLT or Certified Landscape Technician. Many of the managers and supervisors in our company have the CLT designation. No other contractor of our size and diversity in Southern California has achieved this many certifications.

Organizations, current and past memberships:

- CACM (California Association of Community Managers)
- CAI Orange County (Community Association Institute)
- CAI Los Angeles (Community Associations Institute)
- CAI Greater Inland Empire (Community Association Institute)
- CAI Coachella Valley (Community Association Institute)
- ASA (American Subcontractors Association)
- BOMA IE (Building Owners and Managers Association)
- CLCA (California Landscape Contractors Association)
- ISA (International Society of Arboriculture)
- CAPCA (California Association of Pest Control Advisors)



Licensing and Certifications

- California Contractor License 592268 C27, A, D49/C61, C31
- Certified Arborists on staff
- Certified Tree Workers on staff
- Tree Work – Line Clearance Certified
- Tree Work – Line Clearance Certified Instructor
- Certified Playground Equipment Inspectors
- Certified Water Auditor
- Certified Backflow Inspectors
- Licensed Pest Control Company/Pest Control Advisor
- Certified Pest Control Applicators on staff



4. References

City of Palm Springs Landscape Maintenance
Landscape Maintenance and Tree Trimming Services for Parks, Medians, Parkways and Facilities. Duties include routine mowing, trimming, fertilization, watering, hardscape management, Shrub/pruning, irrigatio ,, trash receptacles and tree pruning. Kenneth Kershaw (760) 567-1034 Kenneth.Kershaw@palmspringsca.gov
City of Banning Landscape Maintenance Services
Landscape Maintenance: Debris/litter removal, shrub and ground cover care, weed control, mowing, edging, irrigation maintenance, fertilization, aeration and application. Ralph Wrights (909) 219-0980 Rwright@banningca.gov
City of Palm Desert Landscape Maintenance Area No. 1 and 9
Landscape Maint..-Plant litter and trash control, pest control, plant maint., tree maint., turf maint., planter maint., hardscape maint., and irrigation maintenance. Randy Chavez, Landscape Supervisor (760) 902-9064 rchavez@cityofpalmdesert.org
Coachella Valley Water District Landscaping Maintenance Services
Landscape Maintenance: plant litter and trash control, weed/pest control, plant maintenance, tree maintenance, hardscape and decomposed granite planter areas, and irrigation system maintenance. Mike Munoz, Landscape Supervisor (760) 578-6471 mmunoz@cvwd.org
City of Desert Hot Springs Landscape Maintenance and Operation for LMD and DD for Zone 1 & Zone 2
Landscape Maintenance: Weed removal, chemical weed control, plant replacement, fertilization, hedge pruning/trimming, irrigation maintenance, irrigation repair, irrigation system testing, trash/debris pick-up, clearing walk ways. Nicholas Haecker, Public Works Drct. (661) 902-9987 nhaecker@cityofdhs.org



5. Subcontractors

Number of anticipated subcontractors: 1

Subcontractor #1

Name: Desert Sunshine

License: 950345

Address: 82295 Avenue 50, Indio 92201

Work: Annual tree pruning and palm trimming



C. Proposed Method to Accomplished the Work.

Methodology and work plan

To show our understanding of the work, the following are the **key tasks** that Mariposa is proposing for VSD. All tasks will be per specification and are not limited to the lists below.

We have noticed that maintenance can be improved with a better schedule and communication.

General Maintenance

Our crew will be on-site **one day per week** to ensure all routine tasks are performed. Our crew will prioritize the time in the morning to reduce contact with visitors.

Turf care

Turf maintenance will consist of mowing, edging, aerations.

Mowing and Edging

Frequency: 52 times / year

- Mowing will be completed every week for the entire year Mariposa will be proposing to use of both 72" recycling ride on mower and/or 50" push behind mowers. Clippings will be recycled, and any excessive and visible clippings will be removed.
- Mariposa believes frequent edging will promote neater appearance and we are proposing to edge with each mowing. Edging will be performed with a mechanical edger that is equipped with sharpened steel blade that cuts into the rootzone of the soil.
- Other edges will be detailed with a string trimmer. Smaller areas that need precise detailing, such as around fixtures, between planters and turf areas, around decomposed granite, etc. Soft edging operation around boxes and fixtures will be given additional attention to avoid damages.

Aeration,

Aeration: 2 times/ year

- Aeration will be performed with a tractor or a push behind. Each aeration process will begin with flagging down irrigation sprinkler heads to protect them.
- Core aerator will be utilized unless VSD representative request otherwise.
- Cores will be pulverized.

Fertilization

Frequency: 4 times/ year

- All turf will be fertilized in April, July, September, and during Winter month.
- Fertilizer will be 16-6-8 or slow released type with high nitrogen content.

Shrubs and Ground Cover Care

General Pruning

Frequency: 4-6 times / year (and as needed)



- Planters pruning and monitoring will be performed weekly by onsite crew in a rotation schedule.
- All plant material will be pruned selectively per species.
- All plant materials that encroached into surrounding areas will be pruned immediately upon sight to maintain public safety as well as promote neat appearance. Our crew will monitor all ground cover to avoid encroachment into amenities, building structures, and trees. Ground covers will be pruned a few inches away from the curb to maintain neat appearance.

Fertilization

Frequency: 1-2 times/ year (or as needed)

- Planters' fertilization will be scheduled around March and September
- Fertilizers applied will be specific to plant materials and condition.
- In general, 15-15-15 fertilizer will be applied.
- All fertilization schedules will be approved by VSD representatives and will be notified before the operation begins.

Tree Maintenance

Frequency: as needed

- Our on-site crew will be maintaining safety clearance on a routine basis.
- All tree trimming will be conducted professionally. Currently, we are anticipating a subcontractor to trim all trees and palms.
- Our crew are trained and will follow the ANSI 3000 pruning standard and ISA tree pruning guidelines.
- All tree pruning will be under the supervision of an ISA certified arborist.
- Tree wells will be monitored and cleared from weeds on a regular basis.
- Tree work will be limited to pedestrian and vehicular clearance only.
- Olive trees (8) will be sprayed by our crew members. He or she will carry a qualified applicator license.

Weed Control

Chemical weed control

Frequency: Post emergence – as needed (on- going)
Pre emergence – 2 times per year

- Our herbicide application schedule will be approved by VSD representatives. Chemical application will focus on Pre emergence application two times per year for maximum efficiency.
- Post emergence will be applied when needed
- All chemical application will be kept at minimum and only be use when needed.
- Chemical application will be the primary weed control method on turf, and areas with minimal foot traffic.
- All chemical application will be conducted under the supervision of a qualified applicator license holder.
- All chemicals will be applied per the recommendation of our pest control advisor (PCA).

Manual weed control

Frequency: 52 times/ year (On- going)

- Hand weeding will be an ongoing service perform by on site crew.
- Weeds will be removed with appropriate tools whenever possible.



General Cleanup

Frequency: 52 times per year

- Our crew will be performing litter control tasks. Litter control includes removing debris from landscape areas and removing fallen leaves.
- Decomposed granite pathway will be rake and clean weekly to deliver neat, well groom and clean appearance.

Irrigation

Frequency: on-going

Our crew will be visually inspecting the irrigation system throughout the site.

- Irrigation check will be conducted weekly.
- All repairs will be conducted within 48 hours of notice. Repairs will be per approval by the city representative.

Inspection and Reports

Frequency: 52 times / year

- Inspection will be performed daily by our onsite crew. Closer inspection will be done by our account manager regularly.
- With this proposal, we included a schedule of our work for the year as well as our weekly schedule.
- We are proposing to submit weekly schedule or a brief report to VSD for our completed weekly tasks. In this report, we will address problems that our crew encountered as well as areas that might need more attention in the future. In the past, weekly update has been a success for our clients, and we would like to provide that service to VSD



Work Plan and Schedule for VSD

Mariposa’s maintenance goal for VSD is simple. We want to keep the sites clean, healthy and appealing to visitors. Our work plan is as follow,

Our foreman will inspect the site and report to the account manager to plan for the next week. Any deficiency will be taken care on the day or on the following work day.

Our crew will conduct pruning/ trimming and detailing tasks. They will follow by litter control and site polishing task to clean up the site.

Mowing will be conducted by the other worker.

Any additional task will be performed by additional crew members, such as fertilization and aeration.

Areas will be kept clean and green.

Tentative schedule / staffing plan for VSD

The following schedule is subject to change. All schedules will be approved by VSD representative. Any changes will be made to suit VSD needs.

Please take look at our initial of monthly schedule and daily schedule

At the start of the contract, our manager will submit our annual schedule. We will also, at the beginning of each month, submit our monthly report for VSD representative to review.

Tentative Daily schedule for October 2, 2023				
	Title	Employee Name	Vehicle Number	Site visit
1	Account Manager	Andres Peres	592	VSD
2	Foreperson Maintenance Crew #1	TBD	595	VSD
3	Laborer Maintenance Crew #1	TBD		
4	Spray technicians	TBD		



November 2023

November 2023							December 2023						
Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su
		1	2	3	4	5			1	2	3		
6	7	8	9	10	11	12	4	5	6	7	8	9	10
13	14	15	16	17	18	19	11	12	13	14	15	16	17
20	21	22	23	24	25	26	18	19	20	21	22	23	24
27	28	29	30				25	26	27	28	29	30	31

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
Oct 30	31	Nov 1	2	3	4	5
6 Irrigation Checking Turf Care and Planters care Weed control Weekly Visit: 2 man crew	7	8	9	10	11	12
13 Irrigation Checking Turf Care and Planters care Weed control Weekly Visit: 2 man crew	14	15	16	17	18	19
20 Irrigation Checking Turf Care and Planters care Weed control Weekly Visit: 2 man crew	21	22	23	24	25	26
27 Irrigation Checking Turf Care and Planters care Weed control Weekly Visit: 2 man crew	28	29	30	Dec 1	2	3



Quality Control Program

We perform internal quality control on our work to free up our contract monitor or client representative (be it a Public Works Inspector or Property Manager) so that he or she will have a reduced work load. This creates a positive environment for everyone involved and enhances our client relationships. Our main philosophy behind quality control is summed up in one statement "Plan your work and work your plan." Therefore, the work is to be planned and monitored in the following ways:

Annual Work Schedule

Here is a sample schedule. A final schedule will be provided upon start of work.

Turf Areas	# of Frequencies	JANUARY				FEBRUARY				MARCH				APRIL				MAY				JUNE				JULY				AUGUST				SEPTEMBER				OCTOBER				NOVEMBER				DECEMBER							
		Week				Week				Week				Week				Week				Week				Week				Week				Week				Week				Week											
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4				
Litter Control, All Areas, Liner Replacement	Per Visit	[Green]																																																			
Mowing	52 X year	[Green]																																																			
Edging & Detaling	52 X year	[Green]																																																			
Blowing	52 X year	[Green]																																																			
Sweeping	52 X year	[Green]																																																			
Broadleaf Control	2 X year	[Green]																																																			
Pre-emergent application	3 X year	[Green]																																																			
Fertilizations	3 X year	[Green]																																																			
Aeration	2 X year	[Green]																																																			
Pest Monitoring	Monthly	[Green]																																																			
Irrigation System Inspections	Weekly	[Green]																																																			
Shrubs & G.C Areas	# of Frequencies	JANUARY				FEBRUARY				MARCH				APRIL				MAY				JUNE				JULY				AUGUST				SEPTEMBER				OCTOBER				NOVEMBER				DECEMBER							
		Week				Week				Week				Week				Week				Week				Week				Week				Week				Week				Week											
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4				
Hedge Trimming	8 X year	[Green]																																																			
Ground-Covers Trimming	8 X year	[Green]																																																			
Ground-Covers Edging	8 X year	[Green]																																																			
Shrub Pruning	8 X year	[Green]																																																			
Deadheading & Cleaning	As Needed	[Green]																																																			
Weed Control	Monthly	[Green]																																																			
Fertilizations	2 X year	[Green]																																																			
Pre-emergent application	3 X year	[Green]																																																			
Mulching Refreashing	Monthly	[Green]																																																			
Annual Color	4 X year	[Green]																																																			
Premium Color	1 X year	[Green]																																																			
Removal of Dead Plants	As Needed	[Green]																																																			
Trees & Shrubs Safety Clearance	Monthly	[Green]																																																			
Irrigation System Inspections	Weekly	[Green]																																																			
Hardscapes	# of Frequencies	JANUARY				FEBRUARY				MARCH				APRIL				MAY				JUNE				JULY				AUGUST				SEPTEMBER				OCTOBER				NOVEMBER				DECEMBER							
		Week				Week				Week				Week				Week				Week				Week				Week				Week				Week				Week											
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4				
Safety Inspection and Reporting	Weekly	[Green]																																																			
Blowing	Weekly	[Green]																																																			
Weed Control	As Needed	[Green]																																																			

Within 30 days of award of the contract we will submit an annual work schedule that will organize all the assigned areas into sectioned areas. The sectioned areas will be per the approval of the client representative. The schedule will designate the areas included with the service level and general tasks completed for that month. Any revisions to this schedule will be submitted to the client representative for approval. A review of this schedule will be made at monthly meetings to evaluate success.



Monthly Work Schedules

The Mariposa Account Manager will submit Monthly Work Schedules describing maintenance operations of all areas contained within this contract and when the work, including trimming, pruning and applications of chemicals/fertilizers will be accomplished. Other work will include the removing and/or replacing of landscape materials within the scope of this Contract. The work may include landscape renovations of rights-of-way, medians, retention areas and/or common turf areas. The Account Manager will develop the Monthly Work Plans and submit them to the client representative by the 25th of the previous month prior to the regular monthly meeting. The Monthly Work Plan will correlate with the Annual Work Schedule in a more detailed form. After the plan is approved at the regular monthly meeting the Monthly Schedule Evaluation Form will be completed with the client representative to evaluate the performance of the current month. The Mariposa Supervisor is responsible for creating and submitting these reports.

Irrigation Reports

The Irrigation Technician will create the Irrigation Reports at the specified frequencies and the Mariposa Account Manager will insure their accurate and timely completion. These reports will include scheduled formal inspections, all service requests, authorized emergency work and repair of damage. The Irrigation Technician will be responsible for conducting a formal inspection and related repairs of the irrigation system as scheduled. Results of the inspection shall be recorded on the Irrigation Inspection Report and checked for accuracy and then delivered to the client representative. The frequency of these reports will vary depending on the work scope.

Account Manager/Client Meeting Work Quality Evaluations

A critical aspect of the work is communication. Timely and accurate schedules address a lot of this; however, there is another important aspect that is sometimes overlooked: interpretations of quality. What is beautiful to some is not to others, this is why specifications are written. However, there is always some level of interpretation that can vary from person to person. The goal is to have the Mariposa Account Manager and the client representative both interpreting the expectations of the specifications in the same way. The way we accomplish this is through a graded evaluation of every aspect of the landscape on a site by the Mariposa Supervisor and the client representative. This evaluation is performed prior to the regular client representative meeting by the Mariposa Supervisor. When the regular meeting takes place, this same form is given to the client representative to evaluate the exact same items as the Mariposa Account Manager previously graded. Any differences in evaluation that the client representative has of the same work item or area that were graded by the Mariposa Supervisor are addressed immediately and clarified. The frequency of these evaluations and number of work items evaluated can vary based on the work scope. Please see the sample form provided.

Action Item Lists

Even with jobs that go perfectly there are always items that come up during walk-through inspections. These items may have nothing to do with work quality but may be requests for improvement, additional work or notations of concern, etc. One of the key aspects of an action item list is a target completion date. This is included for every item on our form. The Mariposa Account Manager is committed to completion of a requested activity at an agreed upon date. This is in writing; it's quick and easy to fill out. The client representative will have confidence that we will keep our promises because they are documented. **Our goal is "Promises made are promises kept."** Please see the sample form provided.



Work Quality Evaluation Form



Mariposa Landscapes, Inc.

SITE INSPECTION EVALUATION FORM

Inspection Date: Job:
 Mariposa Account Manager Job Number:
 Client Representative:

Please give a rating of 1-10 on the following items (1 = unacceptable and 10 being perfect)

	ML	CR		ML	CR
1. TURF					
A Color of turf acceptable					
B Turf texture, no thin/bare areas					
C Free of trash/debris					
D Irrigation leaks visible					
E Over or under watering					
F Dry spots					
2. GROUND COVER/SHRUB AREAS					
A Free of trash/debris					
B Free of weeds					
C Mulch evenly distributed					
D Irrigation leaks visible					
E Groundcover trimming					
3. TREES/SHRUBS					
A Health/vigor					
B Trimmed per scheduled cycle					
C Pruned correctly for species					
D Walkway shrub clearance					
E Walkway tree clearance					
F Disease & insects controlled					
G Irrigation leaks visible					
H Over or under watering					
I Trees staked properly					
4. ANNUAL COLOR/POTS					
A Annual flowers healthy					
B Bed/Pots free of trash/debris					
C No missing annual color plants					
D Disease & insects controlled					
E Irrigation leaks visible					
F Over or under watering					
5. D.G. PATHS & OPEN AREAS					
A Free of trash/debris					
B Weeds managed/controlled					
C Erosion areas repaired					
6. HARDSCAPE AREAS					
A Free of trash/debris					
B Free of weeds in cracks					
C Standing water					
D Safety issues reported					
7. IRRIGATION					
A Controllers working					
B Controllers programmed properly					
C Schedules submitted/updated					
D Valves working properly					
E Valves leaking					
F Backflow(s) on					
G Backflow(s) Leaking					
H Meter readings (if in scope) up-to-date					
I Water usage analysis up-to-date					
8. L.V. LIGHTING (if applies)					
A System has power					
B Timer/photocell working					
C Bulbs working					
D Fixtures clean					
E Fixtures broken					
F Fixtures aimed properly					
9. WATER FEATURES (if applies)					
A Power/working properly					
B Leaks					
C Cleaned of debris at inlets					
10. OTHER (if applies)					
A Dog mess cleaned up					
B Dog stations replenished					
C Trash cans dumped & new liners					
D Play equipment clean					
E Ramadas/picnic tables/BBQs clean					
F Response time on call-outs					
G General safety issues reported					

Only enter ratings for items that are applicable to this project (blank = Not Applicable at this time)

OVERALL RATING: Per the above individual ratings, please provide an overall rating from 1 to 10

Mariposa Account Manager Signature/Date (ML)

Client Representative Signature/Date (CL)



Action Items Form



Mariposa Landscapes, Inc.

ACCOUNT MANAGER INSPECTION ACTION ITEMS

Today's Date:

Job:
 Job Number:

	ACTION ITEMS	Resolution Date
1.	_____	<input type="text"/>

2.	_____	<input type="text"/>

3.	_____	<input type="text"/>

4.	_____	<input type="text"/>

5.	_____	<input type="text"/>

6.	_____	<input type="text"/>

7.	_____	<input type="text"/>

8.	_____	<input type="text"/>

9.	_____	<input type="text"/>

10.	_____	<input type="text"/>

 Mariposa Account Manager Signature/Date

 Client Representative Signature/Date

Sample of our Work



Proposer's Green Initiative and Environmental Sensitivity

Mariposa Landscapes, Inc. uses every effort to implement “green” environment and energy conservation measures.

Our company has a recycling program for green waste and paper products. We implement this program at our local offices and at all job sites.

Mariposa currently uses hybrid vehicles and is researching and looking forward to obtaining hybrid equipment to be used on our contracts. We strive to be as environmentally conscientious as possible and are expanding our operations to achieve this goal.

We have been certified by the American Green Zone Alliance – Sustainable Land Care Certification (Electric Equipment). This puts us at the cutting edge of industry knowledge in selecting cost effective options related to the latest in commercial grade electric small equipment as well as mowers.

Mariposa works with all clients to assure optimum water usage where possible. With hundreds of ET “Smart” Controller installations over the years, we can assess a property for water savings, create a solution and correctly program these newer irrigation control devices for optimum savings.

In addition to these and other Green Initiatives, we are also committed to leading the industry in minimizing any potential negative impact on the environment.

The key points of its strategy to achieve this are:

- Minimize waste by evaluating operations and ensuring they are as efficient as possible.
- Minimize toxic emissions through the selection and use of its fleet and equipment.
- Actively promote recycling both internally and amongst its customers and suppliers.
- Meet or exceed all the environmental legislation that relates to the Company.
- Adhere to all local codes and ordinances regarding water conservation.



Integrated Pest Management

Integrated pest management (IPM) is an ecosystem-based strategy that focuses on long-term prevention of pests or their damage through a combination of techniques such as biological control, habitat manipulation, modification of cultural practices, and use of resistant varieties. Pesticides are used only after monitoring indicates they are needed according to established guidelines, and treatments are made with the goal of removing only the target organism. Pest control materials are selected and applied in a manner that minimizes risks to human health, beneficial and non-target organisms, and the environment.



Biological control

Biological control is the use of natural enemies—predators, parasites, pathogens, and competitors—to control pests and their damage. Though Mariposa does not introduce any beneficial organisms into the environment, we do identify and encourage their presence.

Cultural controls

Cultural controls are practices that reduce pest establishment, reproduction, dispersal, and survival. For example, changing irrigation practices can reduce pest problems, since too much water can increase root disease and weeds.

Mechanical and physical controls

Mechanical and physical controls kill a pest directly or make the environment unsuitable for it. Traps for rodents are examples of mechanical control. Physical controls include mulches for weed management, steam sterilization of the soil for disease management, or barriers such as screens to keep birds or insects out.

Chemical control

Chemical control is the use of pesticides. Mariposa Landscapes uses pesticides only when needed and in combination with other approaches for more effective, long-term control. Also, pesticides are selected and applied in a way that minimizes their possible harm to people and the environment. With IPM we use the most selective pesticide that will do the job and be the safest for other organisms and for air, soil, and water quality.



Job Startup and Transition Schedule



Contract Executed or an Official Notice to Proceed

On new contracts we typically purchase trucks and equipment, so we cannot initiate purchases until we have a signed commitment. Quicker startups that are 30 days or less may be an issue with supply chain delays. We prefer a 60 to 90 day start for our procurement. During this period, before the Job Start, we may have one or more meetings with the client to meet the management staff and go over a preliminary schedule of work. We also use this interim time to prepare more detailed maps of the areas with measurements so we can pre-order the materials we will need (fertilizer, IPM material for weed control and other consumables.)

Job Start

On day 1 our crews will have detailed maps of the areas along with task lists and the initial schedule. Our management is heavily involved in logistics during this time. We also go through the irrigation systems with our technicians to perform our initial evaluation. If we find anything that is broken, inoperative or neglected, we create a detailed list with repair pricing and a completion schedule for the customer.

30 Day Evaluation

At 30 days we have a special evaluation meeting with the customer. There are always aspects of every job that cannot be completely spelled out in the work scope and specifications like, custom timelines, work sequences and specific area needs. We go over the experience so far and identify what is working well and what needs adjustment. The customer gets an action plan for any adjustments with timeline commitments from us along with the initial irrigation system inspection.

60 Day Evaluation

At 60 days we anticipate operations to be going smoothly and meeting expectations. We perform a customer survey to assess the customer's perception of the experience related to the proposal process, transition to operations and the actual performance on the job. Our goal is to receive the highest score possible from our clients and provide complete customer satisfaction.

90 Day Evaluation

At 90 days the customer receives a survey with one question on it "Would you recommend Mariposa Landscapes to other customers right now?" Our goal is to receive an enthusiastic "Yes" to this question.



Addenda Acknowledgement.

Addendum #1 – Aug 18, 2023

Addendum #2 – Aug 30, 2023

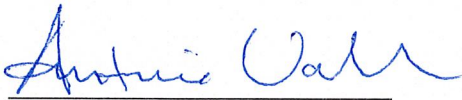
Addendum #3 – Sep 1, 2023



D. Certification of Proposal

The undersigned hereby submits its proposal and, by doing so, agrees to furnish services to VSD in accordance with the Request for Proposal (RFP), and to be bound by the terms and conditions of the RFP.

Mariposa Landscapes, Inc.



Antonio Valenzuela
Vice President of Operations



E. Sealed Fee proposal

Please refer to fee proposal attachment.



9/14/2023

E. Sealed Fee proposal

Proposal Fee Note:

- 2 man 3 hours per week
- Additional worker for aeration and olive tree care.
- The total monthly price is a lump sum.

Task	Monthly
Routine work	\$ 637.80
Turf Care	\$ 675.12
Turf Aeration	\$ 103.79
Olive trees	\$ 45.31
Tree and Palm	\$ 196.01
Total	\$ 1,658.03

Extra rate	Per hour
Foreperson	\$ 58.00
Laborer	\$ 44.00
Qualified Applicator	\$ 68.00
Irrigation technician	\$ 70.00





September 14 2023

RE: Valley Sanitary District Landscape & Lawn Care Services RFP

Holly Gould
Clerk of the Board
45-500 Van Buren Street
Indio, CA 92201

Dear Holly Gould;

Thank you very much for the opportunity to provide you with a response to your RFP #2023-RFP-011 for Landscape & Lawn Care Services for the Valley Sanitary District (VSD).

I have enclosed a proposal for your review encompassing the following sections:

- Proposer Statement of Qualifications
- Scope of Service Areas
- Pricing Quote
- Key Personnel
- References

Desert Arc's mission is to deliver excellent services to meet your needs. Our company and our Landscape Maintenance Division employees are bonded, licensed and insured by the State of California - License #1021561.

Desert Arc Landscape Maintenance Division offers competitive pricing and our mission is to deliver excellence, while supporting people with disabilities.

Thank you,

Angelique Ontiveros
Vice President, Business Development

aontiveros@desertarc.org

760.404.1365

DesertArc.org

73-255 Country Club Drive • Palm Desert, CA 92260 • desertarc.org
phone: (760)346-1611 • toll free: (888)771-7784 • fax: (760)773-0933
OPPORTUNITIES FOR PEOPLE WITH DISABILITIES

PROPOSER STATEMENT OF QUALIFICATIONS

EXECUTIVE SUMMARY

Desert Arc is dedicated to social innovation and has also created a variety of enterprises providing Business Services for local companies and residents. These include our Janitorial, Shredding, Recycling, Landscape Maintenance and Fulfillment divisions. Desert Arc trains and employs our clients while considering each person's unique needs and abilities, enabling them to learn job skills.

A leader in the field of environmental stewardship and sustainability, Desert Arc received the prestigious Riverside County Department of Waste Resources' Sustainability Award in 2019. Desert Arc is committed to implementing eco-friendly business practices and promotes a green world in its diverse business service offerings with its motto, "Every Day is Earth Day!"

QUALIFICATIONS & EXPERIENCE

Under the leadership of longtime President/CEO Richard Balocco, Desert Arc employees 282 people and has been in business and an active participant in the local community, providing **Landscape Maintenance & Lawn Care Services** in the Coachella Valley and Morongo Basin for the past thirteen years.

Desert Arc Landscape Maintenance is a Landscape Contractor, and holds a C-27 Contractors License, CA#1021561 through the State of California. Desert Arc Landscape Maintenance verifies all employees receive a physical, background clearance and drug screen prior to employment. All employees also receive monthly safety training and are First Aid and CPR certified. Desert Arc's DIR Registration Number is **PW-LR-1000677199**.

KEY PERSONNEL

Principal point-of-contact:

Angelique Ontiveros – Vice President, Business Development
Authorized Desert Arc representative, contractual agreements
Employed by Desert Arc – 24 years
760.404.1365
Aontiveros@desertarc.org

Donnya Villarreal – Director, Business & Facilities Operations
Authorized Desert Arc representative, contractual agreements
Employed by Desert Arc – 21 Years
dvillarreal@desertarc.org

Ariel Rubio – Landscape Maintenance Supervisor
Point of contact, contract administration, quality control
Employed by Desert Arc – 10 years, 30 years in the landscape maintenance business
760.899.5269 cell
760.404.1367 office
arubio@desertarc.org

Raul Esquivel – Landscape Maintenance Foreman
Quality Control, supervision of assigned crew, and day to day activities
Employed by Desert Arc – 5 years, 15 years in the landscape maintenance field
760.404.1367
resquivel@desertarc.org

Javier Palomino – Landscaper
supervision of assigned crew, and day to day activities
Employed by Desert Arc – 1 year, 10 years in the landscape maintenance field
landscaping@desertarc.org

Desert Arc Landscape Maintenance Division has been providing service in the Coachella Valley and Morongo Basin for the past 13 years. Desert Arc Landscape Maintenance is a Landscape Contractor, and holds a C-27 Contractors License, CA#1021561 through the State of California. Desert Arc is proudly celebrating 65 years of providing services to our communities.

KEY PERSONNEL CONTINUED

Desert Arc's Landscape Maintenance crews are cross-trained to serve in multiple capacities within the field. Weekly meetings keep all employees apprised of the specific needs and status of each customer to ensure the larger group maintains a strong working knowledge of the planned activities for each customer's environment to ensure continuity and a standard of excellence.

REFERENCES

1. John F. Kennedy Memorial Hospital

47111 Monroe Street
Indio, CA 92201

Routine maintenance service, irrigation repair and installation, property enhancements, and special projects on approximately 10 acres for the past 9+ years.

2. Hi-Desert Medical Center

6601 White Feather Road
Joshua Tree, CA 92252

Routine maintenance service at main hospital and Continuous Care Center. irrigation repair and installation, property enhancements, and special projects on approximately 15 acres for the past 7 years.

3. United States Post Office, Rancho Mirage

42222 Rancho Las Palmas Drive
Rancho Mirage, CA 92270

Routine maintenance service, irrigation repair and installation, property enhancements, and special projects on approximately one-half acre for the past 2 years.

4. Temple Sinai

73251 Hovley Lane West
Palm Desert, CA 92260

Routine maintenance service, irrigation repair and installation, property enhancements, and special projects on approximately one-half acre for the past 2 years.

SCOPE OF SERVICES

Desert Arc's Landscape Maintenance equipment, tools and vehicles are stored at its Palm Desert headquarters when not in use. All Landscape Maintenance crews are dispatched from this location per the schedule of on-site work activities and are continually available as needed.

The property will be maintained in a manner that promotes beauty according to the scope of work provided. Desert Arc will be responsible for all labor, tools, equipment, and insurance related to the scope of work.

Contractor will provide a supervisor, manager and additional crews necessary to maintain the property. Foreman will visit multiple times per week to ensure quality standards are being met and provide additional direction. Supervisor will visit weekly to ensure contract obligations are being met. A crew of four will be assigned to complete regular maintenance tasks, irrigation checks, and mowing. Crew will be on-site one day per week for an average of five hours.

The contractor will have access to the work site only between the hours of 7:00 a.m. until 3:00 p.m., Monday through Friday.

1. LAWNS

The following procedures apply to lawns. All lawn maintenance (mowing, edging, and weed control) must be completed no later than 11:00 a.m. Lawn must be maintained by the following: fertilization; irrigation and weed control. Lawn is to maintain a green and healthy structure. Equipment must be clean of foreign and invasive grasses and weeds.

1.1. MOWING

All lawns shall be mowed on a weekly basis.

1.2. FERTILIZATION

All lawns must be fertilized quarterly to maintain good health, vigor and color throughout the year and applied within the proper time delay. Turf Grow, or District approved equal, is required.

1.3. AERATION

Aeration shall and will be performed semi-annually by the contractor to the maximum depth needed to make sure ground can absorb as much moisture as possible.

1.4. EDGING

All lawns shall be kept within designated areas and edging shall take place weekly.

2. GROUNDCOVER

2.1. EDGING

Groundcover shall be kept within designated areas. Invasive groundcover shall be kept at least six inches from buildings and other structures. Groundcover shall be prevented from invading shrubs or climbing trees.

2.2. FERTILIZATION

Plant material shall be fertilized quarterly and where there are signs of nutritional deficiencies or a desire for additional growth.

3. WEED ABATEMENT

Prior to use of chemicals on recharge facility grounds, Contractor must first provide submittals and Safety Data Sheet (SDS) for prior approval to an authorized VSD employee.

3.1. WEEDS (LAWN AREAS)

Weeds in lawn areas will be controlled by application of an approved pre- or post-emergent selective herbicide or hand pulling.

3.2. WEEDS (GROUNDCOVER)

Weeds in groundcover areas will be controlled by application of approved pre-emergent and post-emergent herbicide, hoeing or hand pulling. Herbicides should be applied on a weekly basis to control this problem. This process must be applied by a state licensed applicator. No Exceptions.

4. CLEANUP

All parking areas, sidewalks, around buildings, interior roads, and bare grounds will be cleaned of plant debris. All plant debris produced by Contractor shall be removed from the site on the service day. The Contractor is required to pick-up all materials left behind on lawn and/or sidewalks. During the fall season, leaves and debris must be cleaned in parking lot areas.

5. IRRIGATION MAINTENANCE

5.1. SPRINKLER OPERATION (The Contractor shall operate the irrigation system)

It is the Contractor's responsibility to adjust/program the sprinkler system to apply water in accordance with plant requirements based on weather, soil conditions and programmed to minimize runoff. Water and power are to be supplied by VSD. If possible, automatic controllers will be programmed to apply water at early morning hours before 6:00 a.m., to conform to periods of low traffic.

5.2. SPRINKLER CLEANING & ADJUSTING

The contractor is responsible for cleaning & adjusting sprinkler heads. Damages to the sprinkler system caused by the Contractor will be brought to the attention of an authorized employee of VSD for prior approval of repairs. If Contractor is approved for the repairs, a change order will be created.

6. TREE TRIMMING

The following procedures apply to trees less than 15 feet in height.

6.1 PRUNING

All trees shall be pruned annually, including 11 palm trees, 8 olive trees, and 1 miscellaneous tree.

6.2 FERTILIZATION

Trees shall be fertilized quarterly each year and where there are signs of nutritional deficiencies or of desired additional growth.

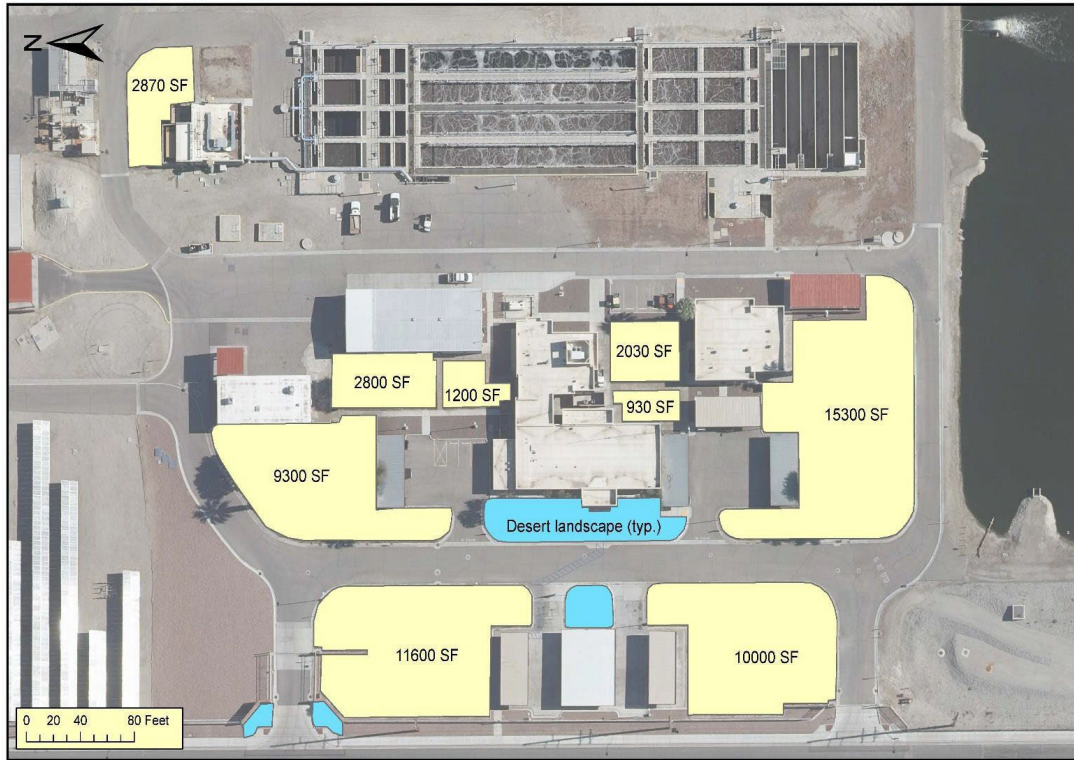
6.3 SPRAYING

Annual spraying of 8 olive trees.

7. ENHANCED SERVICES

Enhanced services shall be quoted at the time service is requested. The District may elect to contract with any other provider for these services.

7.1 Scalping and over-seeding of the lawn.



Item #	Description	Weekly	Bi-Weekly	Month	Quarter	Semi-Annual	Annual
1	Mowing	X					
2	Edging	X					
3	Weed Eat	X					
4	Maintain/adjust irrigation			X			
5	Clear/spray weeds				X		
6	Sweep/blow	X					
7	Litter removal	X					
8	Fertilize				X		
9	Aeration of lawns					X	
10	Clear drains/ditches of debris		X				
11	Tree trimming (Palm, Olive, Etc.)						X
12	Olive Tree Spraying						X

MISCELLANEOUS

All recommendations for additional work will be submitted in writing via a change order to the authorized representative. Change orders must be signed and returned before work will begin.

Further, Desert Arc Landscape Maintenance employees are on call for VSD contact on a 24/7 basis.

- Repair work due to Acts of God, accidents, vandalism and tampering will be an extra charge, billed to the client upon approval. These include but are not limited to: blowing sand, tree and limb damage due to high wind conditions.
- Landscaped areas will be inspected for vandalism, disease, hazards, and pests. Reports will be made as necessary to assigned VSD contact.

CERTIFICATION OF PROPOSAL

"The undersigned hereby submits its proposal and, by doing so, agrees to furnish services to VSD in accordance with the Request for Proposal (RFP), and to be bound by the terms and conditions of the RFP."

SEALED FEE PROPOSAL

Proposed Rate for 1st year: \$924 per month
Proposed Rate for 2nd year: \$989 per month
Proposed Rate for 3rd year: \$1,078 per month

Supervisor \$33.00
Foreman \$24.70
Crew Lead \$23.55
Landscaper \$22.32



COVER LETTER

To:

Valley Sanitary District
45500 Van Buren St.
Indio, CA 92201

From:

Urban Habitat
47250 Washington St. Suite B
La Quinta, CA 92253
760-345-1101 Phone
855-469-4224 Fax

Attn: Holly Gould

Re: Landscape & Lawn Care Services Contract

Urban Habitat would like to express our interest in bidding on your landscape and lawn care services contract for Valley Sanitary District. With over 13 years' experience in the landscaping industry in the Coachella Valley, we are an excellent choice for all your landscaping needs.

We have a dedicated mow crew using state of the art equipment to care for turf. Our company has demonstrated capability in meeting the requirements of this RFP, as we currently service other similar accounts, such as Mission Valley Water District and other projects that have similar sized requirements and more for turf care & management.

Urban Habitat hopes to be of service to Valley Sanitary District, and welcomes any questions you may have regarding our bid.

Regards,

Melissa Rexilius

Melissa Rexilius
Director of Maintenance
melissa@myurbanhabitat.com
760-972-2195 cell

Valley Sanitary District
Urban Habitat
45500 Van Buren St. Indio, CA 92201



Giving Water Another Chance



Statement of Qualifications

EXECUTIVE SUMMARY

Urban Habitat offers a biodynamic and non-synthetic approach to sustainable landscape services. We work with nature and realize that everything in our landscapes are interconnected. Biodynamics teaches us that the soil is alive and the degree of soil health determines the vitality and vibrancy of the plant life growing within it. Think of it this way, we feed the soil and ensure it is healthy and alive. This soil is what in turn feeds the plant.

At Urban Habitat, we invest in keeping the landscape environment beautiful, consciously. Our philosophy is “Nature’s Workforce,” chosen because we believe that if Mother Nature had to choose a landscape maintenance company, she would choose us.

Our water management practices help to conserve water by using water more appropriately and creating less waste. Our “grass-cycling” helps to reduce your need for fertilizer by up to 30%. Our use of low emission powered equipment emits less CO₂ into our atmosphere. We only use organic and environmentally friendly pesticides and herbicides - which means it is safe for your project to walk and play on immediately following application - unlike with synthetic applications. These practices, we like to call sustainable landscaping, is why we are “Nature’s Work Force,” creating a healthier, and greener environment and tomorrow.

Landscape services is often a major expense to most properties, since the appearance of the landscape is important to the property’s reputation and to the protection of community property values. By properly contracting for these services, a property can save money and extend the life of plants.

Our sustainable landscape management program combines regular maintenance visits and seasonal services plants need to stay healthy and look great. Our organic products and methods include corn gluten to fertilize and prevent weed growth; our own “compost-tea” to fertilize; and aeration for reducing soil compaction while increasing soil infiltration.

- **Landscape Maintenance Services:** Our management teams are trained to keep landscapes beautiful with minimal impact on the environment, without further endangering neighborhood pets, local wildlife and beneficial insects; as well as creating a safer community for our friends and families.
- **Sustainable Pest Management:** Integrated Pest Management (IPM) minimizes pesticide usage and relies upon continuous monitoring to determine pest-caused injury levels and the use of a variety of less toxic methods of pest control.
- **Irrigation Management:** Our irrigation specialists are Certified Landscape Irrigation Auditor (CLIA) trained and experienced with all aspects and functions of water conserving systems to ensure optimum water usage for all areas.
- **Landscape Installation Services:** Urban Habitat covers a wide scope of landscape and irrigation installation work. We have the resources and capability to complete virtually any project, regardless of size or complexity.
- **Landscape Design Services:** We understand that occasionally landscapes need to be updated or revived. Our designer is local to Coachella Valley and is experienced in providing a unique aesthetic and quality, bringing value to any landscape

Qualifications and Experience

The combined experience of our staff at Urban Habitat offers the client years of knowledge to properly maintain The Valley Sanitary District. Urban Habitat has been in business for thirteen years.

Technical and professional skills are outlined below:

Brett Brennan is our CEO/Owner with decades of experience in the landscaping industry. He holds a General Engineering License A, C-27 Landscape Contractor’s license, is a certified arborist, and holds a current pesticide applicator’s license.

Melissa Rexilus is the Director of Maintenance, with a degree in Sustainable Landscape and Turf Management. She holds a QWEL (Quality Water Efficient Landscaper) certification and has a QAL-B Pesticide Applicator License.

Rigo Flores Jr. is our Senior Account Manager with more than two decades of experience in the landscaping industry. He holds a Landscape Management Certificate issued by the National Association of Landscape Professionals.

Cipriano Rivera is our Senior Foreman and mow technician. He has been with Urban Habitat for five (5) years, and is responsible for several laborers under his direction and experience. He will be the lead person onsite supervising and performing the work, and speaks some English.

Three (3) Relevant Contracts in last Five (5) years):

- 1) **Mission Springs Water District (Desert Hot Springs)** landscape care for the administrative office and dozens of well sites.
- 2) **PGA West (La Quinta, CA)** Multi-site project that involves large scale lawn care and ornamental landscape maintenance.
- 3) **Talavera HOA (Palm Desert, CA)** large property in Indio that requires a 6-person crew full time all week to manage property including large-scale mowing.

Evidence of California Licensing:

CA License A, C-27, C-61/D49

License # 963744

QAL-B (Pesticide Applicator License)

Brett Brennan, License #133419

ISA Certified Arborist

Brett Brennan, License #WE-11843A

References:

Cyndi Bolander
Community Manager Talavera HOA - CCAM
Seabreeze Management
36945 Cook St Suite 104
Palm Desert, Ca 92211
760-610-8982

Erika Andrade
Community Association Manager Montelena HOA - CCAM
Albert Management
41865 Boardwalk Ste 101
Palm Desert, Ca 92211
760-346-0148

Ben Dobbs
Executive Director at PGA West
55955 PGA Blvd
La Quinta, Ca 92253
P. 760-564-7111

Subcontractors:

Desert Sunshine Tree & Palm Service
82295 Avenue 50
Indio, CA 92201

Proposed Method to Accomplish Work

Urban Habitat's technical approach to this scope of work will be employing the use of several ride-on mowers to perform a bulk of the scope of work with a 3-person crew once weekly. This crew will be responsible for the mowing and front planting bed where the DG is located. This crew will be managed by the Senior Account Manager who will visit twice monthly and compile a checklist for quality assurance through our software Insite Teams. This management strategy allows us to focus on customer and property needs so that the client does not have to manage the property. A schedule of tasks is outlined below:

Regular Rotation Schedule

This rotation schedule illustrates how often our crews will cycle through the project.

	Weekly	Bi-Weekly	Monthly	Quarterly	Annually
Mowing & Edging	X				
Litter/Debris Removal	X				
Irrigation Adjustment					X
Monuments/Gates Detail					N/A
Weed Control	X				
Tree Pruning					x1
Detail Planters	X				
Flowerbed Detail	N/A	N/A	N/A		N/A
Aeration		X2			
Clear drains/ditches debris		X			
Fertilization - Turf					x4
Fertilization - Trees <15'					x4
Fertilization - Shrubs					x4
Fertilization - Groundcover					x4
Herbicide Application				X	
Olive Tree Spraying					X

Maintenance Specifications

Urban Habitat shall maintain landscape areas in accordance with the following specifications. The intent of this agreement is to ensure that your property receives continuous quality maintenance to all landscape areas within the property boundaries. Urban Habitat will endeavor to perform this service in a timely, clean, orderly, safe and professional manner.

Urban Habitat shall keep close communication with the property owner and/or its representative regarding your landscape program, current conditions and any problem areas. Urban Habitat shall offer advice, make recommendations and offer proposals that are intended to facilitate both short and long-term landscape objectives for the good of the community.

Turf Care

Turf shall be mowed on a scheduled basis to maintain a neat appearance and to promote healthy growth. Turf shall be cut at a uniform height and be cut with sharp blades at all times. Care will be exercised during mowing operations to prevent damage to trees and other obstacles in the turf area.

All turf edges adjacent to any hardscape areas shall be trimmed as needed to maintain a neat appearance. Care shall be exercised to the use of edger's and weed eaters to prevent damage to trees, building surfaces, walls, headboard, light fixtures, signage, etc.

Urban Habitat will mow all turf areas with mulching mowers, eliminating landfill "green waste". All turf cuttings will be re-used to reduce fertilization costs.

Fertilization is included in this proposal per the schedule described below. Fertilization of turf shall consist of a commercial organic type, either in liquid or granular form. Additional soil amendments may be applied per the results of the soils test and recommendations for treatment shall be made on a case-by-case basis. All treatments shall be approved by an "Additional Work Authorization" contract.

Shrub/Groundcover Care

Shrubs and groundcover shall be pruned to perform and attain a desired aesthetic appearance while maintaining natural characteristics. Pruning shall be as required for appearance, general containment and safety. Landscape debris generated as a result of Urban Habitat shall be removed and recycled off site.

Fertilization of shrub/groundcover is included in this contract and will be conducted four times per year. Fertilization of shrubs shall consist of a commercial organic type, either in liquid or granular, or to maintain healthy soils by incorporating organic matter, making regular pH adjustments.

Tree Care

All trees will be continually pruned in accordance to International Society of Arboriculture (ISA) and ANSI standards and practices, to maintain the integrity of the tree and clear all walkways and roads. Trees will be maintained in a fashion to encourage the natural form and shape of the tree. Staking and guying will be inspected and adjusted to prevent girdling damage to trunk or limbs.

Fertilization of trees is included in this contract and will be conducted per schedule. Fertilization of trees shall consist of a commercial organic type, either liquid or granular, or to maintain healthy soils by incorporating organic matter, making regular pH adjustments.

Rodents

Urban Habitat shall not be responsible for damage caused by rodents (not limited to gophers, squirrels, rabbits, etc.). Recommendations for treatment shall be made on a case-by-case basis. Urban Habitat will notify the property owner and/or their representative of any rodent eradication action needed. Urban Habitat will be responsible for the labor & material needed to eradicate rodents.

Weed Control

Urban Habitat will be responsible for the labor needed to eradicate weeds (both pre and post-emergent)

Irrigation Management

Controllers shall be adjusted to Urban Habitat sustainable practices and for the healthy growth of landscape areas. Repeat cycles will be utilized to eliminate water run-off and aid in water conservation. System operation shall be set at night or early mornings to reduce water evaporation and adhere to local water conservation practices.

Irrigation will be adjusted and cleaned as necessary for maximum efficiency. Sprinkler heads shall be kept clear of overgrowth, debris, or obstructions. All irrigation systems shall be tested and observed to verify effectiveness and ensure proper system operation.

Irrigation Repair

Repairs from normal wear and tear are not included in this contract (pipe, nozzles, fittings, Etc.) Any vandalism, accident or other unforeseen events will be reported to the property representative immediately. Urban Habitat will also notify the property representatives of corrective repairs needed and are in addition to this contract. Any additional work will be completed under a separate approved "Additional Work Authorization" contract.

Drainage

All landscape drainage devices such as concrete bench drains, swales, etc. will be routinely inspected and kept free of all debris, vegetation, soil, etc. which would deter their proper intended function.

Backflow Preventer Testing

Backflow Preventer testing will be provided with the replacement of any backflow device. Replacement of the backflow prevention device will be completed under a separate approved “Additional Work Authorization” contract.

Hardscape Areas

Planter areas shall be kept free from normal litter and debris. Weeds in cracks in pavement, property sidewalks, shall be hand pulled or sprayed with organic herbicide. All areas shall be cleaned of debris resulting from Urban Habitat work. Urban Habitat practices strict SWPPP company policies.

Integrated Pest Management

Integrated Pest Management (IPM) approach involves treating the landscape as an ecosystem. Rather than routinely scheduling pesticide applications, IPM focuses on regular monitoring and prevention of pests or their damage. It combines several methods of pest management, which reduce impacts on human health, non-target organisms, the environment, and surface and groundwater. Monitoring is an essential part of landscape maintenance.

An IPM approach determines if and when pest management measures are needed by regularly monitoring pests and their natural enemies. IPM employs physical, mechanical, cultural, biological, and chemical controls. It is important that turf and other vegetation be inspected during each visit for indications of pest problems. Pesticides should only be used when necessary and the decision to apply a pesticide must be supported by monitoring records (IPM Field Reports). Pesticide applications should be targeted to the area suffering damage, not to the entire landscape. Materials least harmful (least toxic) to the environment, based on UF/IFAS recommendations, should be used before using more harmful (more toxic) materials, and treatments should be evaluated to determine their effectiveness.

Additional Provisions

Warranty

Warranties are for newly installed plant material only, and must be installed by Urban Habitat. Warranties are as follows:

- 90-day warranty will be granted on plant material of 1, 5 and 15 gallon sizes.
- 12-month warranty for all trees 15 gallons and larger.

Plants damaged by acts of God/Nature, animals or vandalism not covered under warranty.

Holidays

Urban Habitat office and field personnel observe all federal holidays and additionally Good Friday, Friday after Thanksgiving, and Christmas Eve and New Year's Eve.

Good Faith Clause

If the property owner and/or its representatives cannot be reached, Urban Habitat shall use its best judgment to make immediate repairs at "Time and Materials" rates to prevent additional damage or expense to its clients. All work will be billed in addition to this contract.

After Hours Work

After hours/weekend service calls are billed at premium rate plus materials. Emergency services are available 24 hours/seven days a week. Normal operating hours are 7am-4pm.

Force Majeure

Neither party shall be considered in default of this agreement or be liable for damages for any failure of performance hereunder occasioned by the act of God, force of nature, war or warlike activity, insurrection or civil commotion, labor dispute, transportation delay, provided the party effected gives prompt notice to the other. Vandalism and catastrophic and/or unusual events resulting in damage to Laurel Lane II may result in additional costs.

Company Personnel:

This proposal includes all necessary personnel and equipment to successfully maintain the property to quality standards & expectations. All company personnel will be in a dress code with company vests using proper protection equipment. Personnel shall be courteous to homeowners at all times. Occasionally, field personnel may be absent to attend continuing education or industry related classes. Personnel are released during unsafe working conditions, not limited to, extreme weather events, natural disasters or other acts of God.

Quality Control Meetings:

Urban Habitat representative shall meet the property representative upon proper notification. Urban Habitat shall be notified ten (10) days in advance of such meetings. Site visits/walks are also desired to assist in good communication.

Additional Terms and Conditions

Payments and the Right to Stop Work: Contractor shall have the right to stop work if any payment is not made to Contractor when due under this agreement. Contractor may keep the job idle until all payments due are received. In the event that collection efforts are initiated against the Owner, Owner agrees to pay for all associated fees at the posted rates. If any check received from the Owner does not clear our bank, Owner can be liable for three times the amount of the check, up to \$500.00, not less than \$100.00, plus the face value of the check, as set forth on California Civil Code Section 1719. These remedies are in addition to any other remedy that Contractor may have. A failure by Owner to make payment when due, is a material breach of this agreement. Urban Habitat shall not be responsible for any landscape damage caused by work stoppage due to late payments.

Exclusions/Notes to Scope of Work:

- 1) Overseeding is excluded per Scope of Work section 7.1 on the RFP from Valley Sanitary District.

Terms and conditions for environmentally friendly **Landscape Maintenance & Enhancements** to be provided in conformance with this agreement for the monthly sum of:

\$2,420.00 (Two thousand four hundred and twenty dollars and no cents).

This agreement is for a period of one year and is automatically renewed each contract anniversary date. Pricing is locked in for a one-year period upon renewal is subject to a 5% increase. A change in the scope of this agreement and/or specification will be subject to a cost increase. Invoices are due within 30 days of billing date, or are subject to a 1-½% per month service charge (18% annual rate). Urban Habitat shall have right to stop work until all payments due have been received and paid, under the terms of this agreement.

Owner and Urban Habitat retain the right to terminate this agreement upon 60 days' notice by Certified Mail. Owner agrees to pay all materials, extra work and pro-rated service for the period up to and including termination date.

This maintenance & enhancement proposal is good for **30 days** from date of quote.

** Property must be brought to acceptable standards prior to commencement date. Alternatively, a separate approved “Additional Work Authorization” contract may be utilized upon commencement in order to accomplish this.

** Prior to commencement, irrigation systems must be tested and a report provided to owner/representative for review and consideration.

Payment Schedule

Term	Dates:	Term Contract Price
1	10/16/2023 - 10/15/2024	\$29,040.00

12-Month Maintenance Billing Schedule - after enhancement work completed

Year	1	2
January		\$2,420.00
February		\$2,420.00
March		\$2,420.00
April		\$2,420.00
May		\$2,420.00
June		\$2,420.00
July		\$2,420.00
August		\$2,420.00
September		\$2,420.00
October	\$2,420.00	
November	\$2,420.00	
December	\$2,420.00	

The undersigned hereby submits its proposal and, by doing so, agrees to furnish services to VSD in accordance with the Request for Proposal (RFP), and to be bound by the terms and conditions of the RFP.

Accepted and executed this _____ day of _____ 2023_____

Client Name: _____ Signature: _____

UH Representative: Melissa Rexilius Signature: Melissa Rexilius

Business Information

Office Locations

Main Office

Urban Habitat
47250 Washington St #BA
La Quinta, CA 92253

Mailing Address

Urban Habitat
PO Box 1177
La Quinta, CA 92247

Inland Empire

Urban Habitat
10700 Jersey Blvd Suite 450
Rancho Cucamonga, CA 91730

Office: 760.345.1101
Fax: 855.469.4224
24 Hr. Toll Free: 855.469.4224

Insurance Carrier Information

Worker's Compensation Insurance

Sentry Insurance Company - A0116293006

Limited Liability Insurance

Middlesex Insurance Company - A0116293004

Auto Liability

Middlesex Insurance Company - A0116293001

Excess Coverage (Excess Liability)

Middlesex Insurance Company - A0116293005



Valley Sanitary District

DATE: October 10, 2023
TO: Board of Directors
FROM: Tino Tijerina, Facility maintenance Supervisor
SUBJECT: **AUTHORIZE THE GENERAL MANAGER TO EXECUTE A ONE-YEAR CONTRACT FOR JANITORIAL SERVICES FOR AN AMOUNT NOT TO EXCEED \$39,777.84**

Suggested Action

Approve

Strategic Plan Compliance

GOAL 3: Excellent Facilities

Fiscal Impact

Merchant Building Maintenance Inc. proposed a price of \$3,314.82 per month at an annual cost of \$39,777.84, this amount is within the current approved FY 23/24 budget.

Environmental Review

This does not qualify as a project for the purposes of CEQA.

Background

It is necessary to request competitive quotes from vendors, suppliers, and service providers to ensure that Valley Sanitary District receives the highest quality services at the best available rates. The Board of Directors and Staff have determined that a competitive process should be completed approximately every 3 years.

Staff prepared a Request for Proposals for janitorial services of the Main Office, Lab, Operations, Collection and Maintenance trailer.

On August 16, 2023, a Request for Proposals (RFP) was issued through our online procurement portal OpenGov.

On September 14, 2023, seven proposals were received by the posted deadline. The proposals were first evaluated to ensure that all the required information/documentation was properly submitted with the proposal. The properly submitted proposals were then sent to a panel for review and scoring. The proposals were evaluated on the following categories utilizing a 100-point scoring system:

1. Understanding of Project and Project Approach - 30%
2. Scope of Work and Schedule - 25%
3. Relevant Qualifications/Experience - 25%
4. Overall Quality of Proposal - 10%
5. Cost Evaluation - 10%

The proposals were ranked in order from one through seven and the evaluations are summarized below:

Vendor	Evaluator 1	Evaluator 2	Evaluator 3	Evaluator 4
Merchants Building Maintenance, LLC	97% (1)	82% (1)	79% (5)	91% (1)
Ultra Shine, Inc.	87% (3)	73% (4)	81% (3)	88% (2)
Vested Solutions	85% (4)	74% (3)	86% (2)	83% (4)
Desert Arc	95% (2)	70% (5)	87% (1)	74% (6)
Premier Property Preservation, LLC	70% (5)	66% (6)	80% (4)	79% (5)
Blue Collar Contracting	57.5% (7)	81% (2)	67% (7)	85% (3)
Nissho of California	60% (6)	55% (7)	77% (6)	69% (7)

Based on the panel review and scoring, Merchant Building Maintenance Inc. provided the best proposal pricing and services.

Recommendation

Staff recommends the Board of Directors authorize the approval of a one-year contract with Merchant Building Maintenance Inc. in the amount of \$39,777.84.

Attachments

- [Janitorial Evaluation Tabulation Report.pdf](#)
- [Merchants Building Maintenance.pdf](#)
- [Ultra Shine.pdf](#)
- [Vested Solutions.pdf](#)



EVALUATION TABULATION
RFP No. 2023-RFP-010
Janitorial Services

RESPONSE DEADLINE: September 14, 2023 at 4:00 pm

Thursday, September 28, 2023

VENDOR QUESTIONNAIRE PASS/FAIL

Question Title	Blue Collar Contracting	Desert Arc	Merchants Building Maintenance, LLC.	Nissho of California
Have you read and agreed to all Terms and Conditions?	Pass	Pass	Pass	Pass
Submit Proposal Document Here	Pass	Pass	Pass	Pass

Question Title	PREMIER PROPERTY PRESERVATION, LLC	SCS Engineers	Ultra Shine, Inc.	Universal Building Services & Supply Co.
Have you read and agreed to all Terms and Conditions?	Pass	No Response	Pass	No Response
Submit Proposal Document Here	Pass	No Response	Pass	No Response

Question Title	Vested Solutions
Have you read and agreed to all Terms and Conditions?	Pass
Submit Proposal Document Here	Pass

PHASE 1

EVALUATION CRITERIA

Criteria	Scoring Method	Weight (Points)
Understanding of Project and Project Approach	Points Based	30 (30% of Total)

EVALUATION TABULATION

RFP No. 2023-RFP-010

Janitorial Services

Criteria	Scoring Method	Weight (Points)
Scope of Work and Schedule	Points Based	25 (25% of Total)

Criteria	Scoring Method	Weight (Points)
Relevant Qualifications/Experience	Points Based	25 (25% of Total)

Criteria	Scoring Method	Weight (Points)
Overall Quality of Proposal	Points Based	10 (10% of Total)

Criteria	Scoring Method	Weight (Points)
Cost Evaluation	Points Based	10 (10% of Total)

AGGREGATE SCORES SUMMARY

Vendor	Evaluator 1	Evaluator 2	Evaluator 3	Evaluator 4
Merchants Building Maintenance, LLC.	97% (1)	82% (1)	79% (5)	91% (1)
Ultra Shine, Inc.	87% (3)	73% (4)	81% (3)	88% (2)
Vested Solutions	85% (4)	74% (3)	86% (2)	83% (4)
Desert Arc	95% (2)	70% (5)	87% (1)	74% (6)
PREMIER PROPERTY PRESERVATION, LLC	70% (5)	66% (6)	80% (4)	79% (5)
Blue Collar Contracting	57.5% (7)	81% (2)	67% (7)	85% (3)
Nissho of California	60% (6)	55% (7)	77% (6)	69% (7)

Vendor	Total Score	Total Average Rank
Merchants Building Maintenance, LLC.	87.25%	2
Ultra Shine, Inc.	82.25%	3
Vested Solutions	82%	3.25
Desert Arc	81.5%	3.5
PREMIER PROPERTY PRESERVATION, LLC	73.75%	5

EVALUATION TABULATION

RFP No. 2023-RFP-010

Janitorial Services

Vendor	Total Score	Total Average Rank
Blue Collar Contracting	72.63%	4.75
Nissho of California	65.25%	6.5

VENDOR SCORES BY EVALUATION CRITERIA

Vendor	Understanding of Project and Project Approach Points Based 30 Points (30%)	Scope of Work and Schedule Points Based 25 Points (25%)	Relevant Qualifications/Experience Points Based 25 Points (25%)	Overall Quality of Proposal Points Based 10 Points (10%)
Merchants Building Maintenance, LLC.	90%	86%	87%	85%
Ultra Shine, Inc.	83.3%	83%	83%	87.5%
Vested Solutions	85%	85%	82%	80%
Desert Arc	80.8%	87%	87%	72.5%
PREMIER PROPERTY PRESERVATION, LLC	75.8%	72%	77%	72.5%
Blue Collar Contracting	70.8%	72%	77%	58.8%
Nissho of California	66.7%	68%	70%	57.5%

Vendor	Cost Evaluation Points Based 10 Points (10%)	Total Score
Merchants Building Maintenance, LLC.	85%	87.25%
Ultra Shine, Inc.	70%	82.25%
Vested Solutions	67.5%	82%
Desert Arc	65%	81.5%
PREMIER PROPERTY PRESERVATION, LLC	65%	73.75%
Blue Collar Contracting	82.5%	72.63%
Nissho of California	50%	65.25%



merchants
building maintenance

MERCHANTS BUILDING
MAINTENANCE
PROPOSAL

www.mbmonline.com



Holly Gould
Valley Sanitary District
45500 Van Buren Street
Indio, CA 92201

Dear Holly Gould,

We are pleased to submit the following proposal for janitorial services at your facility. We believe this proposal offers you a high-quality cost-effective solution to your janitorial program.

The undersigned hereby submits its proposal and, by doing so, agrees to furnish services to VSD in accordance with the Request for Proposal (RFP), and to be bound by the terms and conditions of the RFP.

Merchants Building Maintenance has wide-ranging experience in servicing a broad commercial real estate customer base, and we can be an excellent partner for City of Hemet. Our management and quality control teams do all that they can to exceed your expectations and take pride in the satisfaction of our customers.

If there is any additional information we may provide, please do not hesitate to contact us. All of us at Merchants Building Maintenance look forward to the opportunity of working with you.

Sincerely,

Alicia Velazquez
Branch Manager
(909) 928-0700
alicia@mbmonline.com

Merchants Building Maintenance, LLC
1995 W Holt Ave
Pomona, CA 91768

COMPANY OVERVIEW

Our History

Merchants Building Maintenance is a family owned and operated company with more than 6,000 employees and annual sales of more than 140 million dollars. Merchants is one of the largest janitorial service companies in the west. Our size and scope allow us to be cost effective while our commitment to quality and service make us exceptional.

Merchants is headquartered on the West Coast with branch offices in nine western states. Our regional offices enjoy the autonomy that allows them to compete regionally by using applicable pay rates, benefits and standards of their unique geographic area. Regional managers and supervisors are free to determine strategies and actions that reflect the needs of their local clients with the support of the home office.

Since our founding we have committed ourselves to providing quality service, as a result we have compiled a portfolio of loyal and distinguished customers who have stayed with us year after year.

- **Founded in 1961**
- **Family owned and operated**
- **5,000+ employees**
- **\$75,000,000 annual sales**

We would be happy to introduce you to our team and give you a firsthand look at our performance.

Customer satisfaction and retention is a true measure of our success.





Reference

City of Palm Desert

73510 Fred Warning Drive, Palm Desert, CA 92260

Contact Person: Randy Chavez (760) 776-6462

Brief Project Description: Janitorial Cleaning Services for various city facilities, including carpet cleaning, floor care, and quarterly window cleaning at all sites.

The Gardens On El Paseo, LLC

73545 El Paseo, Palm Desert, CA 92260

Contact Person: Patrick Klein (760) 862-1990

Brief Project Description: Janitorial Cleaning Services for various city facilities, including carpet cleaning, floor care, and quarterly window cleaning at all sites.

City of La Quinta

78495 Calle Tampico, La Quinta, CA 92253

Contact Person: Alfred Berumen (760) 777-7022

Brief Project Description: Janitorial Cleaning Services for various city facilities, including carpet cleaning, floor care, and quarterly window cleaning at all sites.



Reference

Imperial Irrigation District

81-600 Avenue 58, La Quinta, CA 92251

Contact Person: Rebecca Lechner (760) 339-9217

Brief Project Description: Janitorial Cleaning Services for various city facilities, including carpet cleaning, floor care, and quarterly window cleaning at all sites.

Management Resume

POMONA OFFICE: (909) 622-8260 pomonaoffice@mbmonline.com

Angel Meza- Regional Vice President:

Cell: (213) 494-8805 Email: angel@mbmonline.com

30 Years of service

Oversees all operational aspects including distribution operations. Develops business plans and ensures productivity goals, customer care, & growing and sustaining the structural support.

Develop forecasts, financial objectives and business plans.

Oversees Over 1000 accounts in the Inland Empire in Southern California

Oversees over 500 accounts in the San Diego County in Southern California

Oversees Over 250 accounts in the Las Vegas in Nevada

Alicia Velazquez – Branch Manager

Cell: (909) 928 – 0700 Email: alicia@mbmonline.com

12 Years of Service

Oversees all the operations and contract management, providing the link between the front office and the operations staff. Handles client relations and ensures that each clients' individual needs are being met on a consistent basis.

Oversees over 500 accounts in the East Los Angeles County and Inland Empire including a variety of accounts from banks, utility sites, schools, government facilities.

Rogie Meza – Operations Manager:

Cell: (909) 817-6419 Email: Rogie@mbmonline.com

10 Years of Service

In charge of all operations activities from day porters, night cleaners, and specialized utility crew. Oversees the area managers in charge of the accounts and aids with training and day to day maintenance of the accounts.

Provides any work orders to the main office and ensure that service is provided in the highest quality and most timely matter.

Oversees over 300 accounts in the Inland Empire including a variety of accounts from banks, utility sites, schools, government facilities.



Management Resume

Araceli de la Huerta – Customer Service Manager:

Cell: (951) 830-1101 Email: araceli@mbmonline.com

10 Year of Service

Meets with our clients and conducts periodic quality control reports to ensure that we are providing the highest level of customer service for each account. Documents reports of specific walk throughs and sends them out to managements team to ensure that cleaning requests are completed.

Over 7 Years of ground experience as Area Manager and 3 Years as Quality Control, providing hands on experience to oversee quality work as required by clients. Assist in overseeing 500 Accounts and Client relationship in the LA County and Inland Empire.

Luis Sanchez – Area Manager:

Cell: (909) 263-8028 Email: luissanchez@mbmonline.com

7 Years of service

Responsible for the direct field management of the night and daytime employees and conducts on-site training for new employees. Conducts regular site visits to supervise nightly maintenance and aids when needed. Acts as a liaison between operations and maintenance crew.

Over 3 Years of experience as Account Lead and Floor Technician providing hands on experience to oversee quality work as required by clients and provide guidance and training to janitorial personnel.



Merchants Building Maintenance Service Capabilities

Merchants is unique in our approach to service in the integrated facilities management sector. Rather than just using subcontractors, or “partners” to provide the service, we use our own employees, supervised by our supervisors, managed by our managers, and inspected by our inspectors.

This approach allows us to have much more direct control over the entire service delivery process. Additionally, this also provides more income for our employees on the front lines that are providing the service.

No other cleaning company self-performs as many sites as we do across California, Nevada, and Arizona. Therefore, no other cleaning company has as many Managers, Supervisors, and Utility Crews in these markets.

This depth of management and supervision resources allows us to provide the hands-on, consistent service that our clients expect from us.

Merchants Branch Office Locations





Women's Business Enterprise National Council

hereby grants

National Women's Business Enterprise Certification

to

Merchant Building Maintenance Company

who has successfully met WBENC's standards as a Women's Business Enterprise (WBE).
This certification affirms the business is woman-owned, operated and controlled; and is valid through the date herein.

Expiration Date: 06/30/2015
WBENC National Certificate Number: 2005124761

WBENC National WBE Certification was processed and validated by Women's Business Enterprise Council - West, a WBENC Regional Partner Organization.

Pamela Williamson, Ph.D.
Authorized by Pamela S. Williamson, Ph.D., President/CEO,
Women's Business Enterprise Council - West



NAICS Codes: 561720
UNSPSC Codes: 76110000



We are certified Women-Owned Business by the National Women's Business Enterprise National Council.

MBMWORKS

Real-Time Work Validation System

A fully customizable work validation reporting solution

MBMWorks is a revolutionary real time enhanced cleaning work validation system that utilizes QR code scanning software to create an enhanced cleaning report card. This report catalogs real time data on when a particular area has been cleaned, what cleaning activities were performed, and any notifications on the status of that particular area.

This new technology is provided at no cost to our customers, giving them a much-needed solution to provide real-time data on the cleaning being performed at their locations.



- **100% Free**
- **Real-Time Reporting**
- **Customizable Dashboard**
- **Optimizes Time on Site for our Cleaners**
- **Full Set-up and Implementation in under Two Weeks**
- **Custom Portfolio Reporting Capabilities**

As disinfection cleaning becomes more and more critical, placing a QR code in the specific rooms or areas of our clients' facilities not only ensures that disinfection procedures are being done as required, but also provides us and our clients with important reporting information that can be reviewed in our regularly scheduled Business Reviews.

Beyond the pandemic, the adoption of QR code technology improves the overall health of facilities by assuring consistent cleaning and disinfecting activities are effectively communicated to the custodial staff to reduce the spread of seasonal viruses.

EHUB MANAGEMENT SYSTEM

Work Ticket and Reporting Solutions

Management reporting and timekeeping solutions in the field

We utilize eHub to manage all of our timekeeping, work ticket tracking, and quality assurance reporting both at our branch offices and in the field. Our employees clock in and out using the eHub Timekeeper, which is geo-fenced and updates the system in real time. This means that if we have a no show or there is an issue with a clock-in, one of our dedicated Timekeepers can resolve the issue immediately, 24 hours a day, 7 days a week.

If one of our managers receives a request or encounters any issues, they create a work ticket in eHub that updates in our system and alerts our entire line of management. The work ticket stays open in the system until the task is completed and pictures are uploaded so that it can be closed out.

- **Workforce Management**
- **Work Ticket Tracking and Reporting**
- **Geo-fenced Timekeeping**
- **Employee and Customer Self-Service Portals**
- **Quality Assurance reporting**



Our Quality Assurance Team uses this same software to submit their inspection reports in the field. We create a fully customizable inspection check-off sheet within eHub that our QA Team accesses from their phones and tablets. They complete their inspections and submit them, updating our system in real time. This information can then be used to analyze trends and resolve any deficiencies before they become problems. This reporting is also utilized during our Quarterly Business Reviews and other check-in meetings with our customers to track service delivery and overall client satisfaction.

All of these work tickets, reports, and inspection results are made fully available to our customers and can be accessed through the eHub Customer Portal.

OUR CERTIFICATES

Women Owned Business Certification

Merchants Building Maintenance is certified as a Women-Owned Business by the Women's Business Enterprise National Council. WBENC's world-class certification is accepted by more than 1,000 corporations representing America's most prestigious brands, in addition to many states, cities and other entities. WBENC Certification validates that a business is 51 percent owned, controlled, operated, and managed by a woman or women. To achieve WBENC Certification, women owned businesses complete a formal documentation and site visit process which is administered by one of WBENC's 14 regional partner organizations.



CIMS & CIMS Green Building Certification with Honors



Having undergone a comprehensive assessment of its management structure and green cleaning operations by an independent accredited CIMS-GB assessor

Merchants Building Maintenance, LLC
Orange County Operations

is hereby **CERTIFIED WITH HONORS** to the
 ISSA Cleaning Industry Management Standard Green Building Criteria

and has successfully demonstrated a commitment to the delivery of environmentally preferable services designed to meet customer needs and expectations.

This Certification is valid April 22, 2016 through April 21, 2018.



John Barrett, Executive Director
 ISSA

Merchants Building Maintenance has been awarded both CIMS and CIMS Green Building Certification with Honors. With these certifications, Merchants has established its capability to deliver not only consistent quality service but also to provide green cleaning services and help customers achieve points under the LEED Green Building Rating System. These certifications give us the tools and programs to boost productivity while continuing to provide high quality, sustainable services that protect occupant health and meet customer demands. Our CIMS certifications help us better run our contract cleaning service by positioning our employees as experts in their field.



QUALITY CONTROL & PERFORMANCE

We Inspect What You Expect

In order to deliver a consistently valuable service to our customers, we believe we must “inspect what you expect.” We provide incentives to all levels of our organization to help foster a culture of quality service. We set high standards and continually measure our performance to maintain those standards. We utilize advanced and refined processes to deliver high quality cleaning to each of our clients.

In addition to our ongoing management and supervision, Regular Daytime Inspections are conducted by one of our full-time quality control representatives on as frequent of a basis as the client requires, whether that be weekly, monthly or quarterly. The result of these inspections, along with any comments by your personnel or tenants, will be reported immediately to management for our prompt action and follow through.

Our quality control inspectors are independent of line management and supervision. This independence allows them to be as objective as possible in their assessment of the quality of the service.

The completed Quality Control Form is submitted to the Branch Manager, Regional Operations Manager and Regional Vice President of Merchants after each visit to your facility. Our management then evaluates the information and takes any corrective actions that may be needed to rectify any areas of concern.

Our Quality Control Inspectors communicate directly with your tenants or personnel and make sure that their concerns are addressed before they become a problem. Their requests are noted on the report which can be made available to you so that you are aware of them.

QUALITY CONTROL FORM

Quality Control Form is specially created to meet the needs of each customer location. Each of our employees is educated on the quality control procedures to keep the level of service and communication to our standards. We carefully document all processes of the site inspection to ensure the quality of our services.



Building Exterior
0 1 2 3 4 5
Highest Lowest

Building Exterior Problem Areas - If

- Sidewalks
- Parking Lot
- Entry
- Drive Thru
- Walk Off Mats
- Storefront Doors
- Trash Container

ATM





QUALITY CONTROL & PERFORMANCE

Work Order Tracking

We enter and track work orders from inception to completion. The status of open requests that are scheduled can be reviewed and updated in real time via smartphone or computer. Work orders are generated and dispatched by our staff via email to be sent to our on-site management and supervision. Once the work order is completed, it can be closed immediately within the field.

TRACKING ACCOUNTABILITY

All work requests clearly define who is responsible for the work and the time that is involved in completion. All requests are time stamped, and automatic escalations are triggered by that time, notifying management.

PERIODIC SERVICES ITINERARY

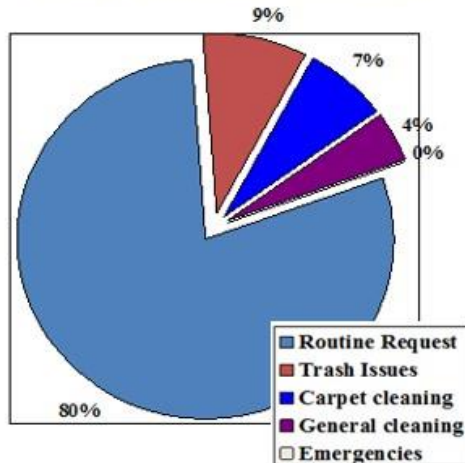
This report provides an itinerary of all the upcoming periodic cleaning tasks for the Project Management Team. It is an invaluable tool for making sure that these scheduled tasks are completed. A copy of this report is kept on-site in the log book with a copy sent to your office and our corporate office.

COMMUNICATION

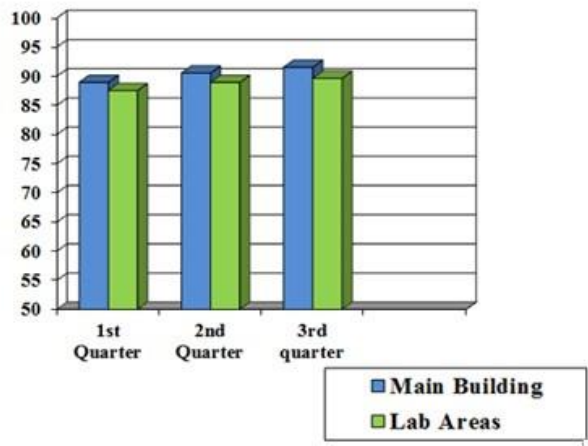
As the requested cleaning tasks are completed and work orders are closed, the reporting system is updated. Supervisory personnel follow up on service issues and requests to ensure all work is completed to our high standards. Any problems that emerge from this follow up are immediately corrected and the communication loop is then closed only when our customers are absolutely satisfied.



Tracking Work Orders by Case Type



Tracking Work Orders by Performance



SAFETY PROGRAMS

Training & Certifications

MAINTAINING A SAFE AND HEALTHFUL ENVIRONMENT

Creating a safe work environment enables us to realize cost savings which we use to fund our Safety Training Program. The fund pays for our Safety and Training Manager, Worker's Compensation Bonus, and our Safety Lotto. A partner who understands the value that these systems can add to your facility and operations is crucial to the success of the program.

SAFETY DEPARTMENT

Our in-house Safety Director is a specialist in the field of work place safety and is accessible to the employees and our clients. In addition, he conducts on-site inspections to guarantee that the procedures are being administered properly.

MONTHLY MEETINGS

Driver record checks are performed before any employee begins driving a company vehicle. A valid driver's license is a mandatory requirement. Each vehicle is numbered and is equipped with a GPS tracker system which is monitored by our Safety Department.

OSHA

To ensure OSHA requirements are being met, we use and monitor a tracking log at each of our locations.

SAFETY TRAINING

All employees receive an employee orientation and training manual with live instruction and demonstrations of the procedures.

DRIVER SAFETY PROGRAM

Driver record checks are performed before any employee begins driving a company vehicle. A valid driver's license is a mandatory requirement. Each vehicle is numbered and is equipped with a GPS tracker system which is monitored by our Safety Department.

SAFETY AWARENESS

Our staff is trained to be alert and ware of safety needs for themselves and the people around them.



SAFETY PROGRAMS

Safety Awards Program

MERCHANTS SAFETY LOTTO

A cornerstone of our safety awards program is our Safety Lotto. Every month we distribute Safety Lotto cards that have a safety message on top of the card. Our employees sign and return the bottom of the cards and return that portion to their supervisor or manager. The cards are placed in a raffle and the winning cards for the \$50, \$100, \$250, \$500 and \$1,000 prizes are awarded.

The employees are eligible for larger prizes if the members of their team or branch have not had an injury in the prior month. This creates an environment where employees want to work safely and they also make sure that the other members of their team work safely.

Every year Merchants Building Maintenance raffles off a new car as well as lots of new computers and cash to our employees.

To be eligible to win, an employee simply needs to have had no injuries in the prior year. This program has been hugely successful at increasing our employee's awareness of safety on the job. No other cleaning company has a safety awards program that even comes close.





PERSONNEL PRACTICES

Management Training

Training Topics for Managers, Supervisors, and Cleaners include:

- Customer Service
- Product Safety Handling
- Tools, Equipment, and Supply Management
- Problem Resolution
- Employee Relations
- Management Skills

Management Training

Each of our managers is trained within the Merchants Building Maintenance business guidelines. Participation in management techniques, employee relations and hands on field training are all part of the management program.

Our management group is a knowledgeable team with many decades of experience dedicated to providing efficient, quality performance and maintenance of our contract obligations. Our management works closely with all levels of our supervision and your representative to ensure customer satisfaction.

Janitor Training

Merchants uses an easy to follow format to train employees on cleaning effectively and safely. Our Trainer's guide includes the following steps:

- **Explain Each Step** - Visual aids as well as live instruction are given on how to prepare and be safe for the task about to be completed
- **Show Each Step** - Employees watch a live demonstration from the trainer on how to properly clean the specific area
- **Do Each Step** - Employees get to do the work themselves with hands on training
- **Review Each Step** - The work is reviewed and any additional professional tips are given

Specialty Care / Utility Training

Our specialty cleaners receive separate training on items such as floor care, carpet and fabric care, wood, stone and metal restoration. Merchants' uses only state of the art equipment for our specialty care division. Our advanced training classes ensure proper application of the skills at the job site. Our qualified specialty care workers receive formal certification recognizing them as experts in their field.

Supervisor Training

Our supervisor training program is comprehensive. Cleaners in supervisory positions participate in ongoing training with our supply vendors and then bring their knowledge back to the site and train the individual janitors. We encourage promotion from within and allow opportunity for our cleaners to advance to supervisory positions once evaluated for ability and desire to do so.

Training Topics covered for Managers, Supervisors and Cleaners, include:

- Customer Service
- Product safety handling
- Tools, equipment and supplies management
- Problem Resolution
- Employee Relations
- Management Skills

Merchants believes team work is essential to achieving superior cleaning practices. As a result, we pair new employees with experienced cleaners for more hands-on training at the actual job site.

BENEFITS

- Higher Level of Cleaning
- Lower Costs
- Safer Work Environments
- Reduced Turnover
- Professional Interactions

PERSONNEL PRACTICES

Our Team in the Field

Foreman/Site Supervisor

- Directly responsible for the performance of the daily routine
- Fully instructed on our cleaning responsibilities, procedures, and periodic cleaning schedules
- On-the-job at all times and able to inspect the work and maintain quality standards every day
- Charged with the primary responsibility of maintaining your facilities to your complete satisfaction

Regular training meetings are conducted to update our Site Supervisors on the latest..

- *Cleaning techniques and products*
- *Modifications at your facilities*
- *Changes made to provide consistent maintenance service*

Service Satisfaction Incentive

- The Foreman/Site Supervisor receives a quarterly bonus based on client satisfaction to make sure all the corners are clean
- Attends a monthly training meeting to stay up to date with the latest cleaning practices and safety Procedures

Area Managers

Our Area Managers are full-time professionals in the field. They conduct the regular night-time inspections of your facilities. Our supervisors are constantly in your building checking the work and training of our employees. They can be radio-dispatched from our Corporate Office at any hour to follow up on all service requests, periodic tasks, or emergencies.

Service Satisfaction Incentive

- Each member of our Area Managers receives a monthly bonus as recognition of a job well done, which is based on the level of client satisfaction and safe working practices at each location. Prizes are awarded at regular meetings that are held with our Area Managers to update them on new cleaning standards and practices.



SAFETY PROGRAMS

Safety Awards Programs

Start-Up Plan

Upon award of a contract, we create a PERT chart (Personnel, Equipment, Resources and Training) to identify key targets and timelines.

It is our goal to deliver you a seamless transition plan when changing your janitorial service contractor. We strive to make this an enjoyable experience for both you and your tenants.

Following is our standard *Service Start – Up Plan* and corresponding **PERT Chart** is our standard Service Start-Up Plan. It consists of a 4 week timeline of activities to complete before we start the cleaning. You will be informed along the way as to when each step will take place.

Merchants' start-up team will meet with you prior to setting-up the Service Start-Up Plan to discuss your requirements so that we can customize a plan to fit your needs. You will have the opportunity to interview the Site Supervisor to ensure that he/she will be well-matched with your on-site management.



1. The appropriate number of training materials, equipment and supplies are collected. Inventories are expanded in anticipation of uniform and equipment requirements.

2. Regional management oversees all operations and interacts with key client facility personnel during the pre-start process.

3. Transition teams are gathered, which incorporates employees from a variety of positions within Merchants, and planning and scheduling is designed.

4. Full implementation begins on the first day of service.

5. Our goal is to provide a seamless transition when changing your janitorial services contractor. We strive to make this an enjoyable experience for you and your tenants.

in your desk.

5. PRICING PROPOSAL

COST OF SERVICES

The Proposer, in compliance with the request for proposals for the Janitorial Services, having examined the Scope of Work and written specifications, hereby proposes to furnish Janitorial Services for the following unit prices.

Line Item	Description	Quantity	Unit of Measure	Unit Cost	Total
1	Administration Building	3	x Weekly	1,009.67	\$12,115.98
2	Operations Building	3	x Weekly	922.12	\$11,065.50
3	Lab Building	3	x Weekly	581.32	\$6,975.80
4	Maintenance Building	2	x Weekly	306.68	\$3,680.18
5	Maintenance Trailer	2	x Weekly	270.11	\$3,241.30
6	Collection Services Building	2	x Weekly	224.91	\$2,698.98
TOTAL		\$3,314.81 Per Month			

6. **VENDOR QUESTIONNAIRE**

6.1. Have you read and agreed to all Terms and Conditions?*

Yes

No

*Response required

6.2. Submit Proposal Document Here*

PDF Attachment

*Response required



merchants
building maintenance

Valley Sanitary District

SCHEDULE	1 time per month Power Washing the Walkways: (Monthly)
January	
February	
March	
April	
May	
June	
July	
August	
September	
October	
November	
December	



	Window Cleaning	Clean Steam Furniture	Strip/Wax	High Dusting	Light Fixtures	Carpet Cleaning
SCHEDULE	Quarterly	Quarterly	Semi Annual	Semi Annual	Semi Annual	Annual
	January	January	January	January	January	January
Administration Building						
Operation Building						
Lab Building						
Maintenance Building						
Collection Services Building						
Maintenance Trailer						
	April	April	April	April	April	April
Administration Building			N/A	N/A	N/A	N/A
Operation Building			N/A	N/A	N/A	N/A
Lab Building			N/A	N/A	N/A	N/A
Maintenance Building			N/A	N/A	N/A	N/A
Collection Services Building			N/A	N/A	N/A	N/A
Maintenance Trailer			N/A	N/A	N/A	N/A
	July	July	July	July	July	July
Administration Building						N/A
Operation Building						N/A
Lab Building						N/A
Maintenance Building						N/A
Collection Services Building						N/A
Maintenance Trailer						N/A
	October	October	October	October	October	October
Administration Building			N/A	N/A	N/A	N/A
Operation Building			N/A	N/A	N/A	N/A
Lab Building			N/A	N/A	N/A	N/A
Maintenance Building			N/A	N/A	N/A	N/A
Collection Services Building			N/A	N/A	N/A	N/A
Maintenance Trailer			N/A	N/A	N/A	N/A



Janitorial Proposal

**Prepared for :
Valley Sanitary District
2023-RFP-010 Janitorial Services**

Winner of the 2021 BSCAI Image Award





September 13th, 2023

Prepared for:
Valley Sanitary District
2023-RFP-010 Janitorial Services

Holly Gould
Clerk of the Board
45500 Van Buren St.
Indio, CA 92201
760-238-5400 ext. 135
hevans@valley-sanitary.org

Prepared by:
Ultra Shine Group

Tom Tran
Vice President
601 S. Milliken Ave Unit J
Ontario, CA 91761
951-987-7239
tom.tran@ultrashine.com

Dear Holly,

Thank you for the opportunity for Ultra Shine to submit a proposal for the provision of janitorial services to the Valley Sanitary District in response to Request for Proposal 2023-RFP-010 Janitorial Services.

Ultra Shine (previously Wurm's Janitorial Services) is a privately held corporation that was acquired in 2021. The organization has been rebranded and registered to Ultra Shine, Inc. in 2023. Please note, all insurance for Wurm's Janitorial includes coverage of Ultra Shine, Inc.

With over 25 Million Cleanable Square Feet currently being serviced, 300+ customers, and over 500 employees, Ultra Shine has been providing similar municipal services in North America since 2009.

Specializing in complex facilities such as casinos, recreation centers, shopping centers, business centers and several large municipal and industrial contracts, Ultra Shine has the knowledge and experience to provide the Valley Sanitary District with high quality and cost effective commercial cleaning services.

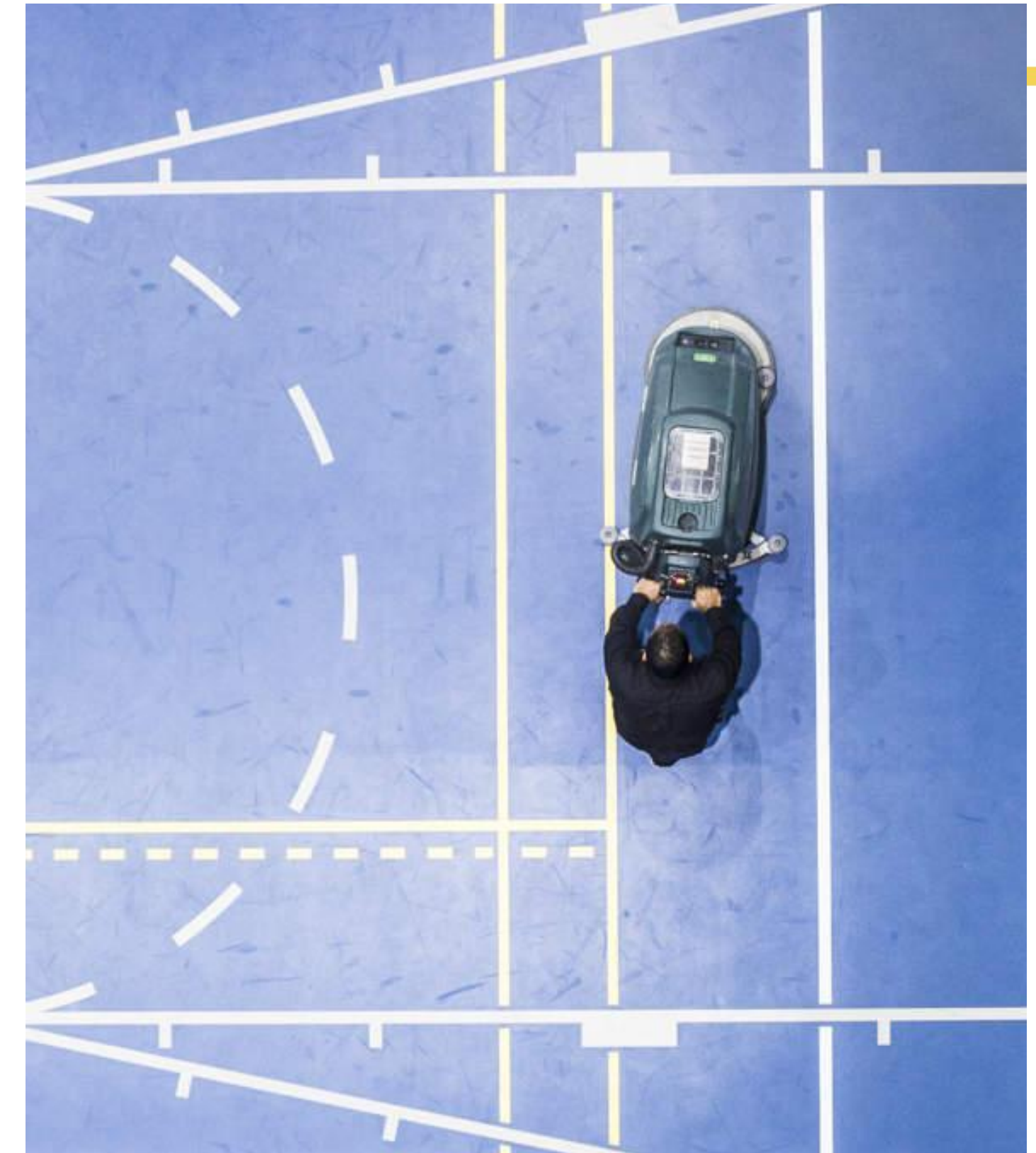
Thank you again for this opportunity,

Tom Tran - Vice President

TABLE OF CONTENTS

This document describes an overview of how we would approach this work, costs, and other considerations.

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1.0

Executive Summary

Executive Summary

Ultra Shines' history providing services for a wide range of facility and business types, equips us with a unique set of skills that allow us to provide high quality services to any facility. From office buildings to industrial sites and waste management facilities to casinos, we are prepared for anything.

These skills accompanied by our investment in technology, quality assurance and time management, ensure our customers receive top quality service at a cost effective price point.

These skills and experience are further described throughout this proposal package.





2.0

Qualifications & Experience

Proposers Experience

Ultra Shine holds an ISO:9001 certification an accredited quality management system standardization, demonstrating our commitment to high quality service offering. This accreditation has been held since 2018 and takes part in annual auditing processes to ensure our quality assurance processes and systems continue to meet or exceed ISO expectations and requirements.

Ultra Shine utilizes quality assurance and time tracking systems that allow for self management and ensure any deficiencies or unsatisfactory work is caught, followed by the creation of action items and directions to rectify any concerns including retraining where necessary, often before it becomes a concern to the customer.

Our GPS time tracking systems allow us to ensure our staff are utilizing their time efficiently and effectively while highlighting areas of improvement, or possible time and cost savings.

Ultra Shine also implements an employee referral program which encourages staff to refer qualified friends and family through the implementation of bonuses when team members meet certain milestones. This successfully ensures Ultra Shine has qualified individuals available for projects like the Valley Sanitary District when needed and ensure the highest quality of service to our customers at all times.



DIVERSE ULTRA SHINE GROUP LEADERSHIP



FELIPE ALDEA
Principle



TOM TRAN
Vice President & Operations
(resume attached)



Leticia Levario
Quality Assurance



Javier Peinado
Sr. Area Supervisor



JAS DUHRA
Director, Finance & Strategy



NICHOLE GOLDSCHMIDT
Controller



SALOME ALDEA
Director, Customer Experience



TRISHA VERGO
Project Manager



ELIZABETH D'ARCY
Strategic Partnerships



KHURRAM SHAHZAD
Manager, Service and Standards

Firm Information/Organization

Account Manager

Javier Peinado - Senior Area Supervisor

javier.peinado@ultrashine.com

951-433-9455

Relevant Projects

Superior Courts of CA - Riverside County

County of Riverside

City of Palm Desert

(See references for more details on these projects)

Javier is involved in all major accounts serviced by Ultra Shine

Responsibilities

- Main point of contact for all service inquiries, concerns, changes and day to day communications.
- Training of staff assigned to project locations
- Supply management and delivery
- Assist in site audits/inspections and reporting
- Planning, organization, direction, coordination and supervision of operations functions and activities
- Establish custodial work standards and flow
- Ensuring compliance with regulatory agencies

Project History

Javier has been with Ultra Shine for 6 months and has been actively working on the relevant projects since his start with the company.

Key Individuals

Leticia Levario - Customer Experience & Quality Assurance

leticia.levario@ultrashine.com

323-616-6886

Relevant Projects

Superior Courts of CA - Riverside County

County of Riverside

City of Palm Desert

(See references for more details on these projects)

Leticia is involved in all accounts serviced by Ultra Shine

Responsibilities

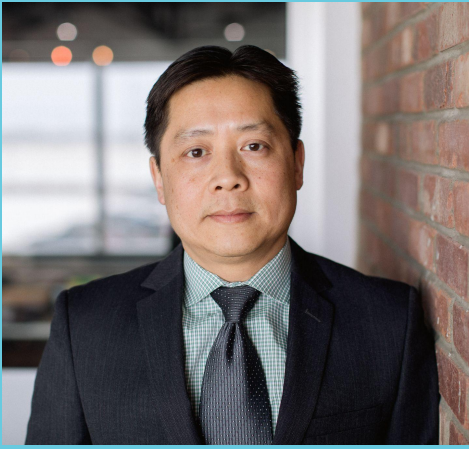
- Second point of contact for all service inquiries, concerns, changes and day to day communications
- Responsible for regularly scheduled on site audits/inspections and reporting
- Responsible for regular check in with customer contacts to ensure facilities needs are being met and customer satisfaction
- Ensure all staff are properly uniformed and janitor rooms and equipment are properly maintained
- Ensure safety regulations are observed

Project History

Leticia has been with Ultra Shine for 10 years and has been involved with customer communications since the beginning. Recently moving into a more hands on position in 2022, Leticia works on all Ultra Shine projects as our Customer Experience & Quality Assurance representative.

Tom Tran - Vice President

See resume on next page for responsibilities and experience



Tom Tran

Vice President & Operations

Tom oversees all Operational activities in California and will be involved in contract start ups, renewals/extensions, task/scope of work creation and implementation, budgets, quality assurance and customer services.

Duties

- Ensure all operations in North America are carried out in an appropriate, cost effective manner
- Improve operational management systems, processes and best practices
- Recruit, train and supervisor staff
- Find ways to increase quality of customer service
- Main point of contact for all contract renewals or changes
- Assist in day to day customer services and communications for all major projects
- Find efficiencies through monitoring of quality assurance reports, time tracking, and introduction of new processes to better customer experience and satisfaction
- Management of all management staff including supervisors, quality assurance, sales, etc.

Work Experience

Ultra Shine, Inc.

General Manager 2016-2022

Duties

- Maintain positive guest relations
- Actively participate in business, community and civic affairs in local area
- Maintain an adequate inventory of supplies and achieve budgeted cost controls in cleaning supplies, chemicals, utilities, telephone costs, etc.
- Follow-up on client requests and concerns
- Utilize Ultra Shines procedures to properly forecast budget and staff each operation
- Maintain job sites in compliance with the Health and Safety and Quality Assurance policies
- Ensure all personnel are receiving adequate training, development, motivation and performance review feedback

Manorrllea Systems Inc

Vice President 2010-2016

Director of Operations 2010-2010

Operations Manager 2009-2010

Duties

- Oversee 31 buildings (over 60,000,000 sq/ft)
- Oversee 4 Area Managers, 1 Project Manager and 1 Operations Manager
- Quality audits of various locations
- Assist in training and developing new junior manager
- Created and implemented Manorrlleas' Health and Safety meeting minutes with 52 topics
- Oversee day to day operations within Manorrllea
- Sales and marketing
- Set-up budgets new and existing contracts
- Follow-up on client requests and concerns
- Assist in Manorrlleas' Health and Safety Program and revised manual in Oct 2011

Phone:

1-844-566-8776

Email:

tom.tran@ultrashine.com

601 S Milliken Ave.
Ontario, CA

Skills:

- Organized
- Sales
- Customer Service
- Communication

Certifications:

- Carpet Cleaning
- Floor and Restoration
- Total Quality Manager
- Fire and Smoke Restoration

Languages:

- Cantonese
- Vietnamese

Ultra Shine at a Glance

Providing janitorial services to complex facilities in North America since 2009.

25 Million

Sq. Ft Cleaned

300+

Customers

500+

Employees

Our Certifications



Superior Court of CA County of Riverside



SUPERIOR COURT
OF CALIFORNIA

COUNTY OF RIVERSIDE

Location

16 Court Facilities located throughout Riverside County

Square Footage Serviced

856,495

Contract Value

\$1,200,000.00 Annually

Length Serviced

17 Years

Facility Description

High security facilities provided nightly cleaning and day porter services 5 days weekly. Services include public areas, kitchens, water fountains, stairwells, office, and washroom cleaning as well as additional tasks assigned by the on-site facilities coordinator.



Key Staff

Javier Peinado - Senior Area Supervisor

Leticia Levario - Customer Experience & Quality Assurance

Tom Tran - Vice President & Operations

County of Riverside

Location

13 county facilities located throughout Riverside County

Square Footage Serviced

344,080

Contract Value

\$593,000.00 Annually

Length Serviced

1990's - On Going

Facility Description

Highly secure (Liva Scan Federal Level clearance required)
Riverside County facilities including Courts, Sheriff Departments, Coroners, Schools, Juvenile Halls, community centres, etc.
Services include private offices, lobbies, lounges, washrooms, litter pick up, housekeeping and clinic spaces.



Key Staff

Javier Peinado - Senior Area Supervisor

Leticia Levario - Customer Experience & Quality Assurance

Tom Tran - Vice President & Operations

City of Palm Desert

Location

73 - 510 Fred Waring Dr, Palm Desert, CA

Square Footage Serviced

25,393

Contract Value

\$30,000.00 Annually

Length Serviced

9 Years

Facility Description

Highly secure service provision for cleaning services to the Riverside County Sheriff Department, a tenant of this Palm Desert City owned facility.



Key Staff

Javier Peinado - Senior Area Supervisor

Leticia Levario - Customer Experience & Quality Assurance

Tom Tran - Vice President & Operations



3.0

Evidence of California Licensing

BUSINESS LICENSE CERTIFICATE

"For Services Provided in the
City of Corona, California Only"



8839 N Cedar Ave #212
Fresno, CA 93720-1832
License Division - (951) 736-2275

BUSINESS NAME: WURMS JANITORIAL SERVICES INC

DESCRIPTION: JANITORIAL SERVICES

BUSINESS LOCATION: 544 BATEMAN CIR
CORONA, CA 92880-2011

BUSINESS OWNER: LARRY D. STEWART
BARBARA J. STEWART

Special Conditions: Janitorial Service

LETICIA
WURMS JANITORIAL SERVICES INC
601 S MILLIKEN AVE STE 3
ONTARIO, CA 91761-7898

Business License Number: 03928626

Effective Date: August 01, 2023

Expiration Date: July 31, 2024

TO BE POSTED IN A CONSPICUOUS PLACE

NOT TRANSFERABLE

WURMS JANITORIAL SERVICES INC:

Thank you for your payment on your City of Corona Business License. **ALL CERTIFICATES MUST BE AVAILABLE FOR INSPECTION UPON REQUEST.** If you have questions concerning your business license, contact the Business Support Center via email at Corona@hdlgov.com or by telephone at (951) 736-2275 .

Keep this portion for your license separate in case you need a replacement for any lost, stolen, or destroyed license. A fee may be charged for a replacement or duplicate license.

Starting January 1, 2021, Assembly Bill 1607 requires the prevention of gender-based discrimination of business establishments. A full notice is available in English or other languages by going to: <https://www.dca.ca.gov/publications/>



BUSINESS LICENSE
8839 N CEDAR AVE # 212
FRESNO, CA 93720-1832



CITY OF CORONA
BUSINESS LICENSE CERTIFICATE

LETICIA
WURMS JANITORIAL SERVICES INC
601 S MILLIKEN AVE STE 3
ONTARIO, CA 91761-7898

License Number: 03928626

Date of Issue: 08/01/2023



4.0

References

References



County of Riverside Contact

Rose Salgado
Director of Facilities Management
3450 14th Street, Suite 200
Riverside, CA 92501
rose.salgado@rivco.org
951-955-0050



SUPERIOR COURT
OF CALIFORNIA

COUNTY OF RIVERSIDE

Riverside Superior Court Contact

David Aldana
Riverside County Superior Court
4100 Main St
Riverside, CA. 92501
david.aldana@riversidecourts.ca.gov
957-777-3210



City of Palm Desert Contact

Carlos Hernandez
73510 Fred Waring Drive,
Palm Desert, CA 92260
chernandez@cityofpalmdesert.org
760-346-0611



Medicine Hat
The Gas City

City of Medicine Hat Contact

Blair Bohnet
Facility Maintenance Supervisor
BLABOH@medicinehat.com
405-529-8178



5.0

Subcontractors

Subcontractors

It is not the intention at this time for Ultra Shine to use subcontractors to provide services for the Valley Sanitary District. Ultra Shine uses directly employed staff at customer sites whenever possible.

Should subcontractors be needed for the Valley Sanitary District contract, all subcontractors will be backchecked, will be trained on Ultra Shine practices and procedures and will be help to Ultra Shine and customer standards.

All subcontractors will be approved by the Valley Sanitary District before they are able to be placed on site.





6.0

Proposed Methods

Proposed Methodology

Understanding

Ultra Shine understands the expectations of scope of work required by the Valley Sanitary District as outlined in the provided RFP documentation. Ultra Shine's quality assurance inspection system is based on a points system and includes every task to be completed within each area of a facility. This ensures the ability to track deficient work quality, assign corrective actions and verify rectification. Ultra Shine's expectations for cleaning quality are so high that anything less than a 90% upon completion of inspection is considered a fail and requires an action plan be created to address and fix any concerns. These inspection reports are shared with our customers to encourage transparency in communication and service offerings.

The scope of work as outline in the provided RFP documents are all standard parts of Ultra Shine's service offerings at many of our specialized customer facilities. Our understanding of proficiency in meeting the complex and unique needs of our customers make Ultra Shine a great fit for the Valley Sanitary District.

Resources

- Accredited quality management certification and program
- GPS Time Tracking
- Live inspection reporting
- Employee Referral program (ensure qualified cleaning professionals are always available)
- Investment in innovation (technology, process, equipment)
- Streamlined cleaning solutions
- Business Continuity Plans (plans of action during emergency situations such as pandemic, acts of god, etc.) to ensure service consistency in any situation
- Strong economic diversity provides specialized expertise and experience while ensuring business security for both the business and customers

****Additional resource details on following pages****

Response to Scope of Services

This is an acknowledgement of Ultra Shines understanding and commitment to providing the full scope of services as outlined in 2023-RFP-010.

Ultra Shine will provide all labor, supervision, cleaning materials, equipment, cleaning supplies, insurance and administrative services necessary to perform all janitorial services set forth in the specifications outlined in 2023-RFP-010.

Ultra Shine prides itself on its ability to adapt to our customers changing needs and will provide all added services to new or existing facilities at the same high quality service standards throughout. Any increases or decreases to the scope of services will be reflected on monthly invoicing as temporary changes to nightly cleaning service needs arise and all pricing increases will be calculated in the same manner as the prices quoted as part of this submission.

The following pages outline Ultra Shines draft schedule of tasks proposed to address the scope of services as outlined in 2023-RFP-010.



Sample Scope of Work

- 2 Cleaning staff will be present for each cleaning
- Administrative, Operations and Lab facilities serviced: Monday/Wednesday/Friday
- Maintenance Shop, Trailer and Old Shop facilities serviced: Tuesday/Thursday
- Additional tasks or adjustments marked with *

Site Area	Daily	Weekly	Monthly
Lobby, Mailroom and Common Areas			
Spot clean entry glass in doors *	O		
Full clean of entry glass in doors *		O	
Arrange furniture and magazines in reception waiting area	O		
Remove all cobwebs			O
Wipe down all horizontal surfaces including, door frames, windowsills, file cabinets, counters, etc.	O		
Spot clean kick plates, handrails, light switches and wall to hand height	O		
Full clean of kick plates, handrails and light switches *		O	
Empty all trash cans and replace liners	O		
Wipe exterior of trash cans as needed *	O		
Disinfect tables, desks, chairs, counters, exterior cabinets, sinks and handrails, etc. (Touchpoints)	O		
Vacuum all carpeted areas and mats	O		
Sweep and mop all hard surface floors including rolling mats in offices and cubicles		O	

Sample Scope of Work (Cont.)

Site Area	Daily	Weekly	Monthly
Offices and Conference Rooms			
Clean glass in doors	O		
Remove all cobwebs			O
Wipe down all horizontal surfaces including, door frames, windowsills, file cabinets, counters, etc.	O		
Spot clean kick plates, handrails, light switches and wall to hand height	O		
Full clean of kick plates, handrails and light switches *	O		
Empty all trash cans and replace liners		O	
Wipe exterior of trash cans as needed *	O		
Disinfect tables, desks, chairs, counters, exterior cabinets, sinks and handrails, etc. in conference rooms (Touchpoints) *	O		
Disinfect tables, desks, chairs, counters, exterior cabinets, sinks and handrails, etc. in offices (Touchpoints) *		O	
Vacuum all carpeted areas and mats	O		
Sweep and mop all hard surface floors including rolling mats in offices and cubicles	O		
Lunchroom/Lunchroom Areas			
Clean and disinfect chairs, tables, counters, and exterior of cupboards	O		
Clean the interior and exterior of microwaves	O		
Wipe down exterior of any additional appliances and light fixtures (fridge, toasters, dishwashers, etc.)	O		
Clean and sanitize all sinks including garbage disposal	O		
Restock paper products and soap *	O		
Sweep and mop all hard surface floors	O		
Ensure all coffee makers are turned off	O		
Clean interior of fridge last Friday of each month - do not removing personal items *			O
Empty all trash cans and replace liners *	O		
Wipe exterior of trash cans as needed *	O		

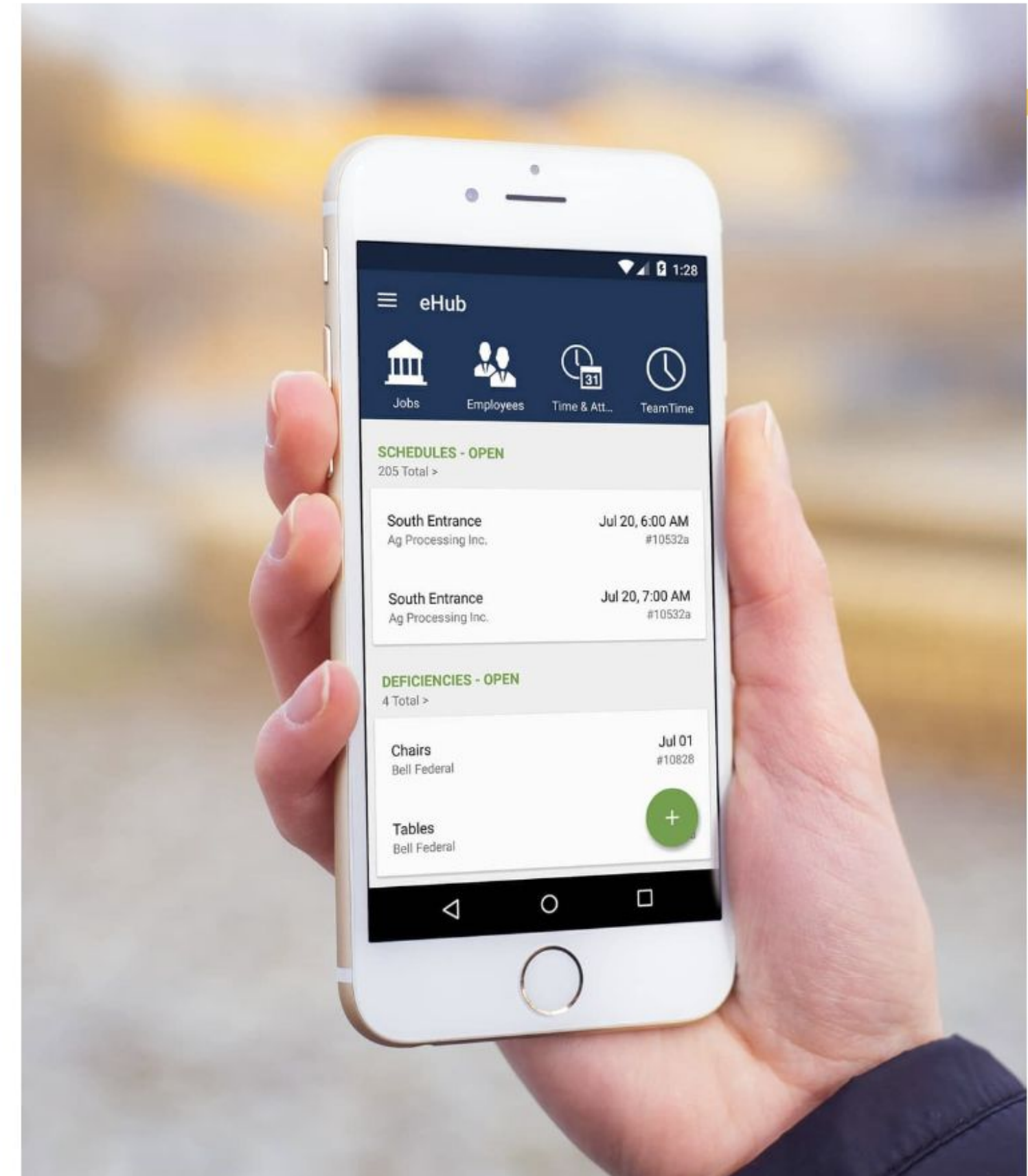
Sample Scope of Work (Cont.)

Site Area	Daily	Weekly	Monthly
Restrooms			
Clean and disinfect all urinals, toilets, mirrors, counters, sinks and shower stalls	O		
Clean and polish all bright work and dispensers	O		
Spot clean walls, partitions and light fixtures to hand height	O		
Empty all trash cans and replace liners	O		
Wipe exterior of trash cans as needed *	O		
Sweep and mop all floors	O		
Clean exhaust fan grating		O	
Wipe down tops of partitions, dispenser and any additional horizontal surfaces		O	
Restock all products including toiletries, soap and paper products	O		
Outdoors			
Empty trash cans and replace liners	O		
Wipe exterior of trash cans as needed *	O		
Remove cobwebs		O	
Janitor Room			
Sweep and mop hard surface floors *		O	
Remove any garbage *	O		
Wipe down any shelving or horizontal surfaces removing any dust or spilt product *	O		
Maintain proper janitor rooms postings including SDS *	O		
Maintain proper labeling of cleaning products *	O		
Maintain equipment in clean and working order (cleaning mop buckets regularly) *	O		
Wipe down mop sink to ensure clean and free of debris and build up *		O	

QUALITY ASSURANCE

Industry Leading Inspections

Our leading-edge software is the most innovative, powerful, and efficient cleanliness inspection tool in the facility services industry. This technology ensures a standardized and consistent approach, with documentation and evaluation for both the client and our quality assurance inspectors.



MEANINGFUL TECHNOLOGY

Employee Communication and Data Control Dashboard

Supervisors and staff get live information on the go from a desktop or mobile device including inspection follow ups and safety information, work requests, job information and critical communications that affect all employees.

How You Benefit

- Self Managed System means less of your time
- 100% Transparency
- Automated communication, resulting in reduced response time
- Improved Client Satisfaction
- Customized inspection & work order reports provide data for process improvement

The screenshot displays a 'Supervisor Dashboard' with several key sections:

- Timekeeping:** Shows 0 APPROVE (Mar 17 - Mar 23), 0 PENDING, 36 EXCEPTIONS, and 0 DENIED.
- Deficiencies - Open:** Lists 'Proper Labelling' (Starlight Casino #17070, Mar 19) and 'Sinks' (Edmonton HQ - Diamond International Trucks, Mar 19).
- Checkpoints - In Progress:** Shows '3081: Health and Safety' (Allied Blower #10890, Mar 11 4:08 CDT).
- Action Items:** Displays 339 OPEN ITEMS and 0 MY ITEMS, with a 'CREATE NEW' button.
- Reports:** Offers to 'Select a report to view' from options like Compliance, Employee Roster, Hours Budget Comparison, and Turnover.
- Content:** Lists items such as 'Reporting and Investigating Potential Safety In... multiple Jobs #' and 'Journal - Q4 multiple Jobs #'.
- Employee Requests:** Shows 'NO EMPLOYEE REQUESTS FOUND'.
- Work Requests:** Shows 0 OPEN requests and a 'CREATE NEW' button.
- Time Off:** Features a large green plus sign and a 'CREATE NEW' button.
- Work Scheduling:** Includes a calendar for 'Mar 17 - 30, 2019' with a 'View Full Schedule >' link.

SUPERIOR TIME-TRACKING

GPS Time Tracking means safer, better managed job sites.

Our employees are required to clock-in/clock-out at the beginning and end of each shift using Ehub. Employees can log in using a phone on your site via GPS - if an employee tries to log in or out from elsewhere the area supervisor is immediately notified.

In combination with GPS, this technology ensures only the pre-screened employees are the ones working on site. Logs are inspected and verified by our Area Supervisors.

Require Callers to Specify Hours Types (Service Categories)

Post Watch Job

Enforce In/Out Rejections based on PS Schedules

Enforce In/Out Rejections based on Abs Schedules

Build Schedules from TeamTime

Default Post

Lunch Settings

Apply Minimum Lunch Settings

If hours worked is or more hours, and TeamTime

Lunch (by Punch Action) is or fewer minutes, then set the calculated lunch to zero.

Mobile TeamTime

Allow Mobile TeamTime for this Job

Capture Device Location

Reject if Location Services is disabled

Reject if Location is outside perimeter

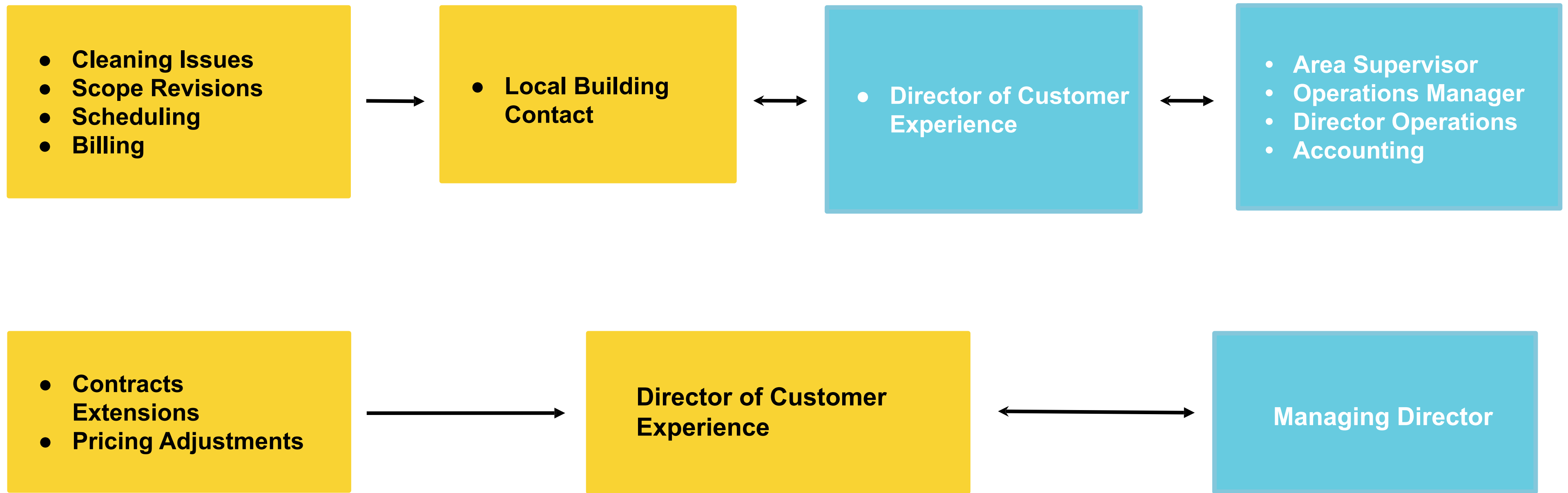
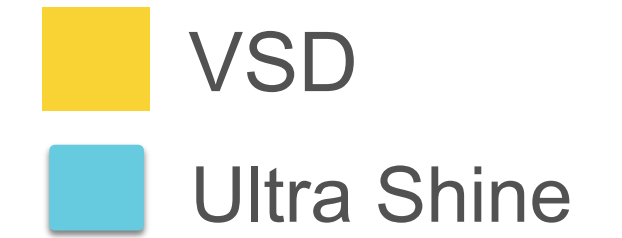
Lat 53.51894014 Distance 0.03000 Km

Long -113.38462932

Caller ID Number List		
Description	Number Type	Phone Number
Phone	Mask	5915438682
*		

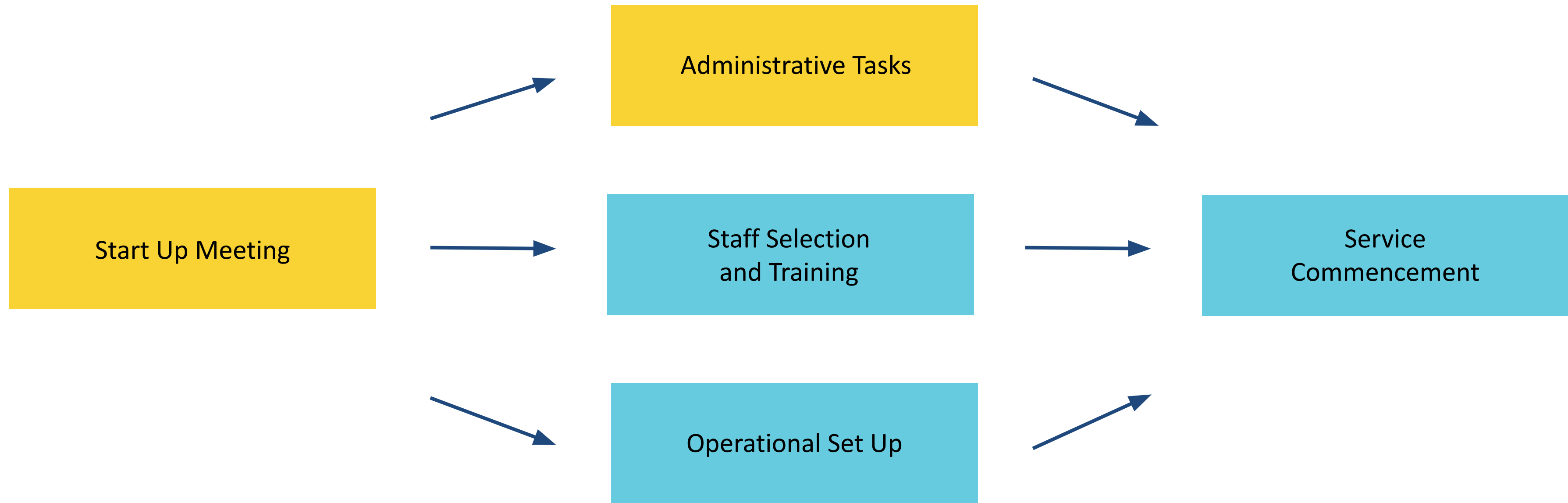
“We track this information daily, not just when there is an issue.”

Communication Guideline



	Customer	Customer Service	Human Resources	Operations	Site Supervisor	Accounts Payable	Front Line Staff
Start up Meeting <ul style="list-style-type: none"> - Review scope of work and start up plan - Determine customer main point of contact - Determine who supplies and monitors consumables - Obtain customer billing information - Provide customer with communication booklet and determine its location at site - Get access to keys and alarm codes 	X	X		X	X		
Preparing Site <ul style="list-style-type: none"> - Set up supplier account - Order supplies and equipment - Get all janitor room postings, SDS booklets and safety booklets to site - Install dilutions system and product dispensers if applicable - Get supplies and equipment to site - Organize janitor room - Set up quality assurance account for site with scheduled visits and reminders 				X		X	
Preparing Staff <ul style="list-style-type: none"> - Select staff for account - Begin hiring process is applicable - Ensure all staff have orientation - Ensure all staff have WHMIS training - Provide staff with uniforms and ID badges if needed - Provide scope of work to front line staff - Set up GPS coordinates for clock in/out accounts for assigned staff - Begin on site training "Shining Start" 			X		X	X	X
Start Up and Follow Up <ul style="list-style-type: none"> - Begin providing services to customer - Bill Customer - 1st Inspection - Check in with customer to discuss start up success 	X	X					X

Commencement Flow





We partner with ClearChecks and receive a comprehensive background check on all potential employees before they start any work in any building.

All of our employees are required to wear a standard Ultra Shine uniform and ID tag with their photo and ID number. Our employees are required to clock-in/clock-out at the beginning and end of each shift using Ehub, the same program we use for our Quality Assurance programs and inspections. In combination with GPS, this technology ensures only the pre-screened employees are the ones working on site. Logs are inspected and verified by our Area Supervisors.

Protocols for Emergency Response

Emergency Response Executive
 President : Customer Communications
 General Manager : Command Center
 Director, Business Development: Media Relations
 Controller : Security

Emergency Response Ground Team
 Director of Operations : On site coordination
 Manager, QA and CE : Employee care and coordination



Notification of Emergency Event can come through any level, but only the President or GM can activate the Emergency response protocol.

- Ground team to asses the situation and report to command center.
- If media or customer has questions, take their number and inform them that they will get a call from communications shortly
- Hourly updates from ground team to command center
- Public statement, customer statement relayed to Ground Team.

Email is sent to Ground Team titled "We are activating the emergency response protocol, please proceed to site xxx and await instructions from the command center. This is followed up by a phone call.

Email is sent to Executive titled "WE are activating the emergency response protocol, please proceed to the command center. This is followed up by a phone call.

Command Center to determine public statement, media statement, work instructions and arrange for security

Business Continuity Plan

Ultra Shine takes pride in our ability to prepare for the unexpected. Through creating plans for everything from cyber attacks to natural disaster, we are ready to take action to ensure business as usual for our customers and their facilities.

Challenge	Solutions		
Supplier Shortage	Par stock of 1 month of excess chemical, mop heads, rags and other tools to be kept on site at all times for remote areas. This is not an obstacle in highly populated areas where suppliers are abundant.	USG will keep a minimum of two suppliers to ensure that similar products can be made readily available.	All auto scrubbers and sweepers will be of the same/similar make and model to allow the availability of exchange if one is out of service.
Natural disaster	If a natural disaster occurs where the customer will need major cleanup, we will deploy firstonsite who will work directly with the insurance company.	If minor (non-restorative) cleanup is required, we will deploy project manager and staff from other areas, find temporary accommodation and bill out the customer at hourly rate plus expenses.	If a natural disaster occurs that keeps our staff from being able to report for duty, the customer will be advised as soon as possible and credited for the work.

Challenge	Solutions		
Labor dispute	Should the customer's staff become involved in a labor dispute where picket lines are present, our staff will ride in and out with the customer's management and temporary workers.	Customers will provide security to allow our suppliers to deliver products or meet suppliers off site and cross the picket lines.	USG GM is experienced with labor disruption BCP being formerly responsible for BCP in Canada during previous employment. GM will be made available to join task force, or deploy to site to assist in any capacity required by the customer for a daily rate.
Cyber Attack or Cyber shut down	USG has partnered with a company called Nirix who provide backup and recovery services, virtual desktops, email exchange anti spam and the latest anti virus software.	All Servers are at an offsite location and is cloud based	Operational data and accounting data is housed in another offsite backup facility in Omaha Nebraska.
Necessity shut down - lights, heat, water	USG will stock a minimum of 1 flashlight for each staff member we have on site. Only critical areas to be cleaned.	In the event of heat shut off, we will work with customers to ensure that space heaters are placed in areas that could have negative results due to cold (plumbing areas etc.).	In the event that water is shut off, water will be hauled in if necessary to complete minimal service levels.

Color Coding for Rags and Mops



General



General



Toilette / Urinal



Restroom



Garbage Cans



Restaurant Kitchen

Environmental Compliance

Ultra Shine's Green Cleaning program focuses on products, tools, equipment, processes and policies. Our program promotes a healthier environment for your building's occupants while significantly reducing the harm done to the environment. Green cleaning also preserves your capital investments (floors, furniture, etc.) because Green Seal products are less harsh than traditional products.

We strive to develop partnerships with environmental leaders in the industry so we are continuously updating our training, operations, and procedures to be more eco-friendly and safe for our customers.

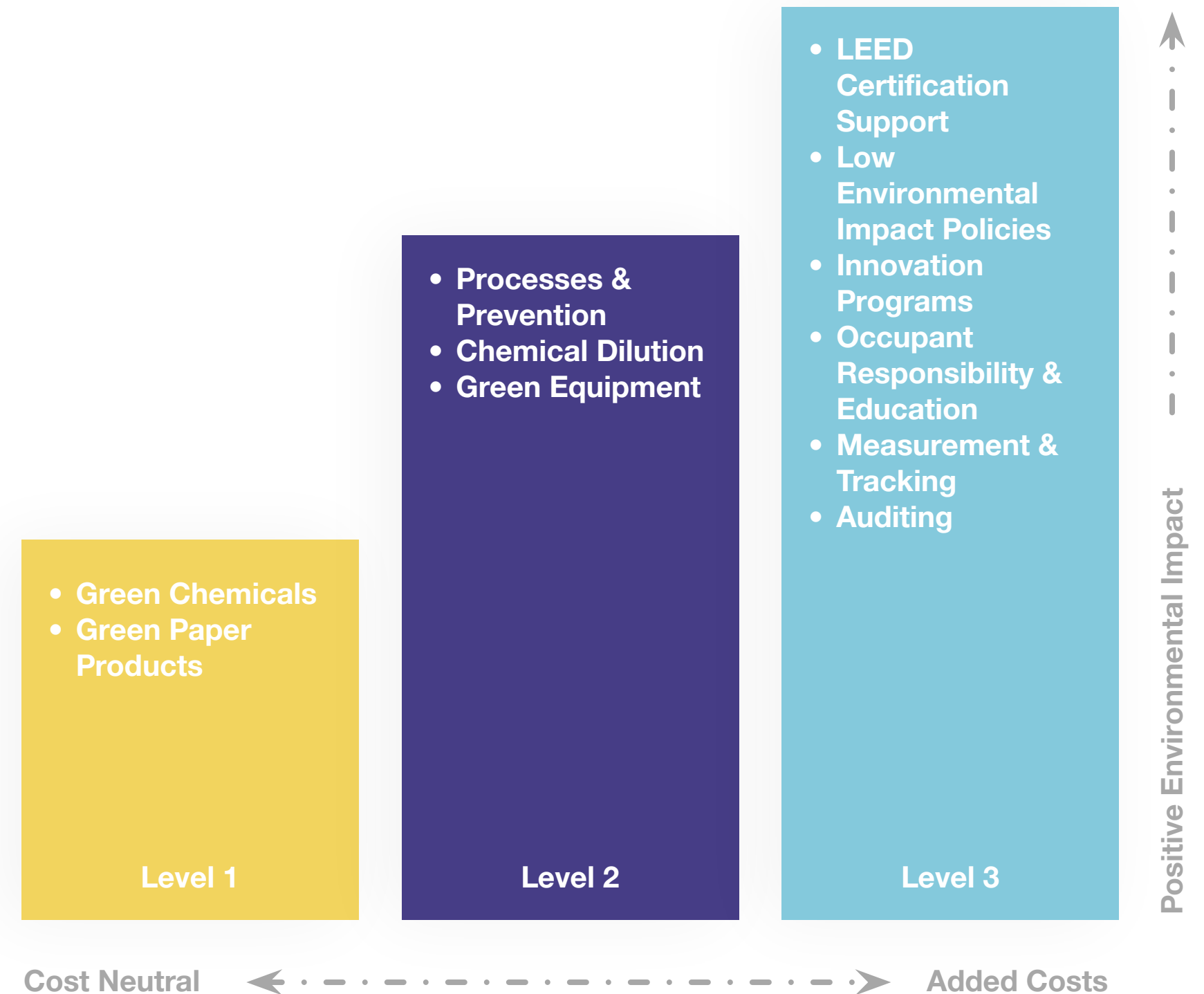
A Flexible Program to Meet Your Sustainability Goals

We've made the program flexible by offering three distinct levels. We'll help you take a more holistic approach to green cleaning, whether it's switching to green cleaning products, implementing sustainable equipment and processes or assisting with LEED certification.

Ultra Shine's experience servicing LEED facilities

City of Edmonton, ISL Engineering & Baker Hughes

The Green Cleaning Continuum



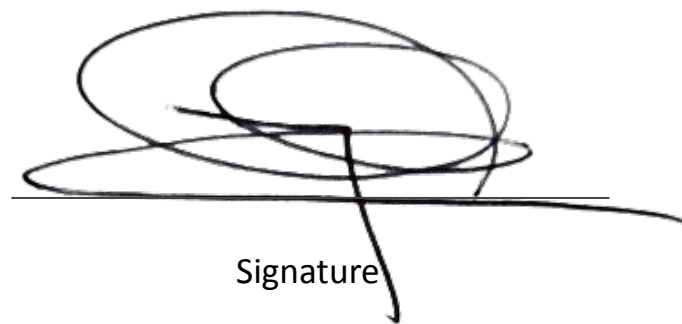


7.0

Certification of Proposal

Certification of Proposal

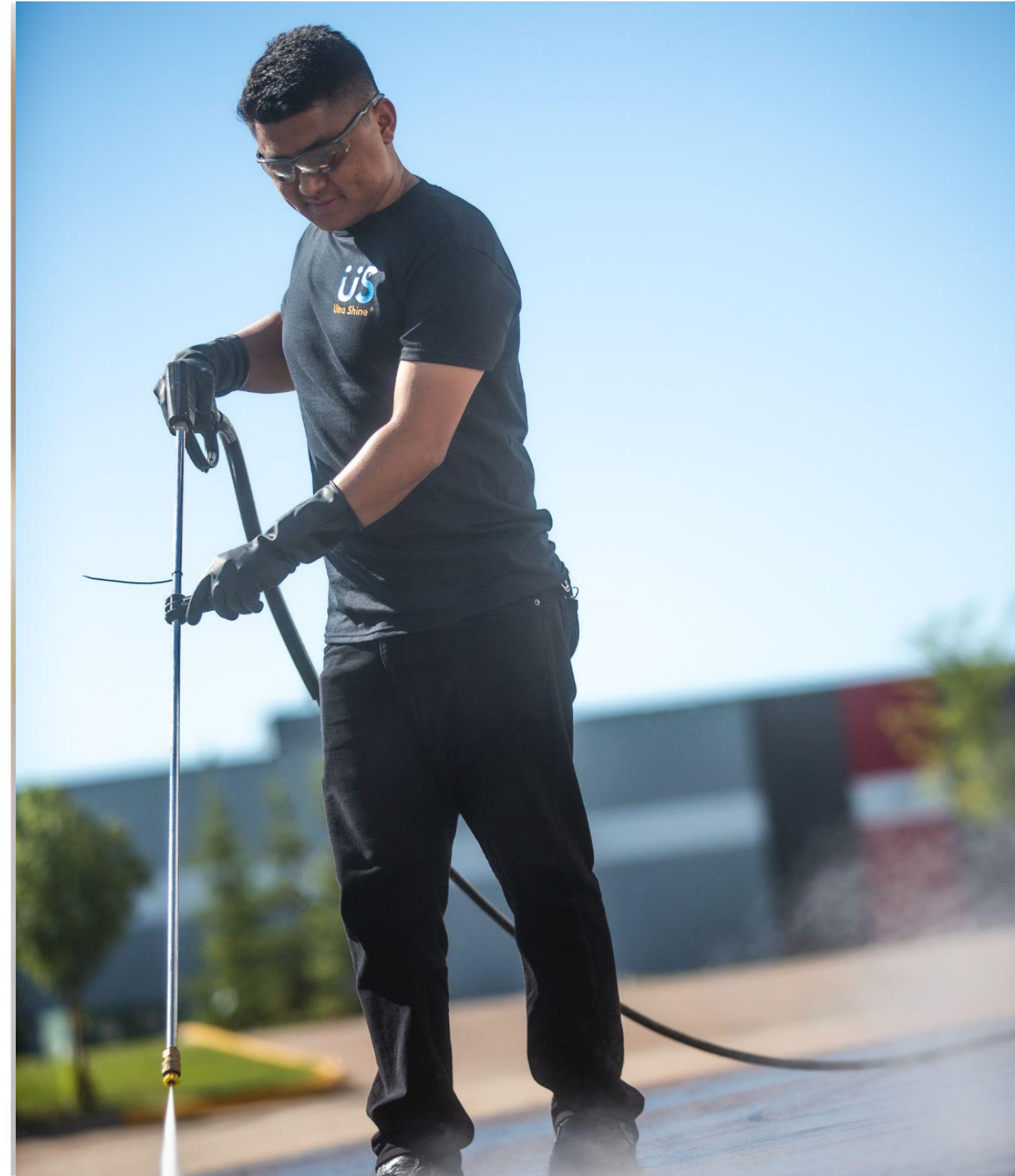
The undersigned hereby submits its proposal and, by doing so, agrees to furnish services to VSD in accordance with the Request for Proposal (RFP), and to be bound by the terms and conditions of the RFP.



Signature

09/13/2023

Date





8.0

Fee Proposal

Proposed Schedule

Position	Shift	Sun.	Mon.	Tues.	Wed.	Thur.	Fri.	Sat.
Supervisor	Flex		X			X		
Cleaner 1	5:30 PM - 8:40 PM		X		X		X	
Cleaner 2			X		X		X	
Cleaner 1	5:30 PM - 7:30 PM			X		X		
Cleaner 2				X		X		

Service/Cost Breakdown

Service	Details					
Services	Daily Hours	Weekly Hours	Monthly Hours (4.35 Weeks a Month)	Rate	Monthly Cost	
Admin Building Cleaning Services (Monday, Wednesday, Friday)	3	9	39.15	\$17.00	\$665.55	
Operations Cleaning Services (Monday, Wednesday, Friday)	2.5	7.5	32.63		\$554.63	
Lab Cleaning Services (Monday, Wednesday, Friday)	.75	2.25	9.79		\$166.39	
Maintenance Shop Cleaning Services (Tuesday, Thursday)	.75	1.5	6.53		\$110.93	
Maintenance Trailer Cleaning Services (Tuesday, Thursday)	.75	1.5	6.53		\$110.93	
Old Shop Cleaning Services (Tuesday, Thursday)	2.5	5	21.75		\$369.75	
Supervision (Monday, Thursday)	1	2	8.7	\$19.00	\$165.30	
Total					\$2,143.48	
Employee/Fringe Benefit				+ 25%	\$535.87	\$2,679.35
Janitorial Equipment					\$106.94	
Cleaning Supplies					\$154.31	
Total					\$2,940.60	
Overhead (Management & Administrative)				+ 15%	\$441.06	\$3,381.69
Profit				+ 9%	\$392.54	\$3,686.04
Total					\$3,686.04	
Additional Services Hourly Rate					\$30.00/HR	



9.0

Appendix

OUR VALUES

We view our relationships as partnerships and are committed to working together to increase efficiencies and lower operating costs ensuring our customers are able to maximize their value. When you succeed, we do too.



We take care of your team

Lower your costs and improve health and safety across all facilities within your organization.



We believe in collaboration

When working with us, you aren't just a client. We see our relationship as a partnership where your success is our success.



We Are Diverse

Streamline and standardize your facility maintenance through one vendor for all services and locations.



We believe in community

Provide measurable customer service with dedicated customer service reps and the account partner program.

WHAT MAKES US DIFFERENT

Experience & Flexibility

Quality Assurance

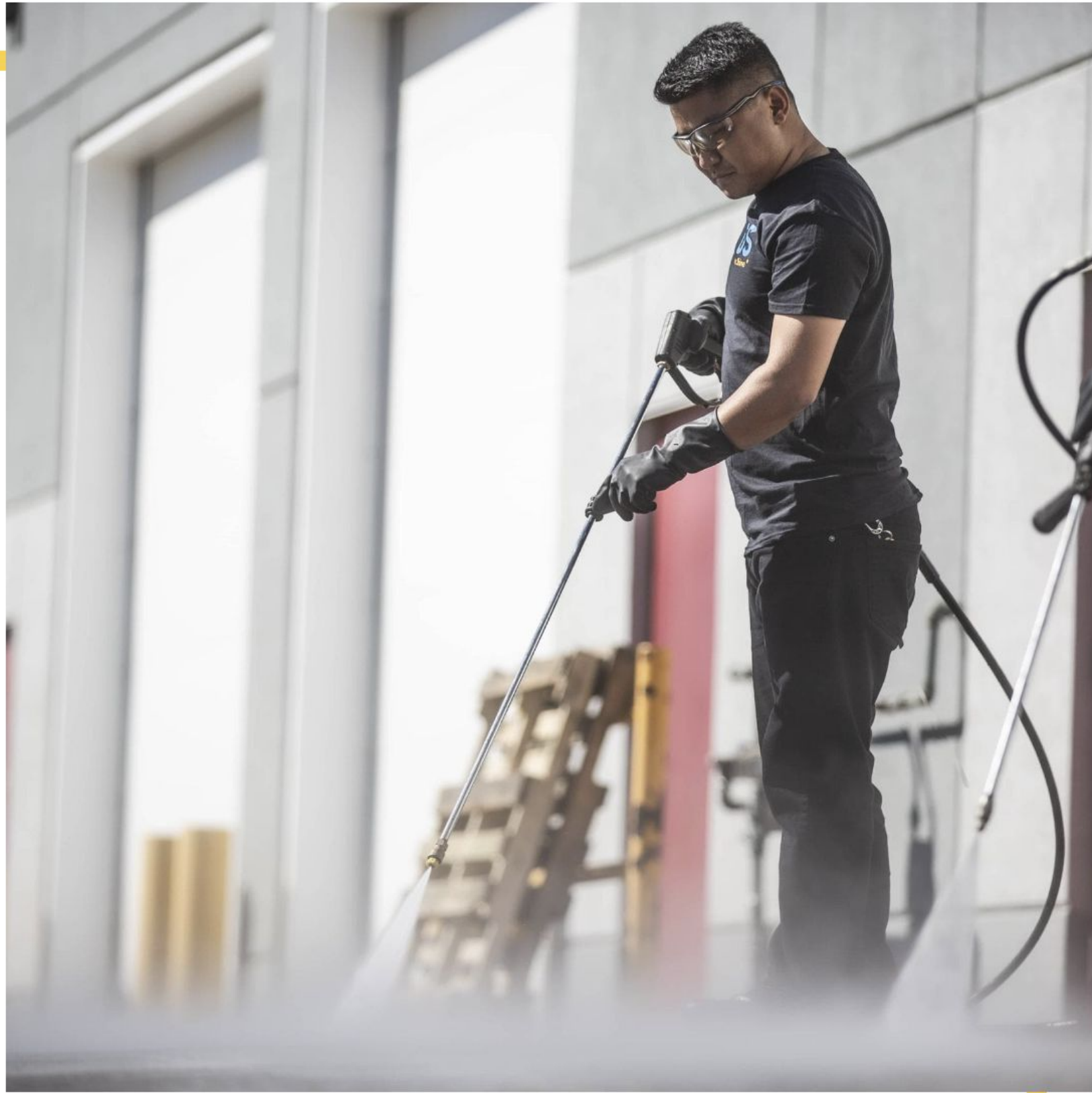
Self-Managed Supplier

Multi-Location Scalability

Frontline Employees

Innovative Approach





OUR SERVICES

Proven leaders in the commercial cleaning services industry.

- Janitorial Services
- Disinfection programs
- Floor Stripping, Polishing & Refinishing
- Carpet Shampooing
- Window Cleaning
- Commercial cleaning
- Sanitizing
- Waste & Recycling Programs
- Multi-Facility Solutions



ULTRA SHINE UNIVERSITY

Ultra Shine University is where we develop our talent internally and position them for growth. We do this by:

- 10 years of standardizing our training programs, courses and manuals
- Identifying team members interested in true growth, not just the titles
- Involving many specialists from within the family to grow people (play to our strengths)
- Launching internal certifications
- External education through sponsored development (MBA, COR, Proj Mgmt)

THE FUTURE IS NOW

As one of the first commercial cleaning companies in North America to dive into the world of robotics, we have tested and monitored this exciting new technology in action and have found there to be exciting results.

Key Benefits of Our Tech:

- Reduces Labour
- Lowers cost
- Higher efficiency of monotonous work
- Allows janitors to focus on detailed tasks
- Overall improved cleanliness



CONNECTED CLEANING

We use AI and robotics to increase efficiencies in commercial carpet cleaning, and future drone technologies will increase the rate of disinfecting large areas by 16x.



 SoftBank

 **Lucid**
DRONE TECHNOLOGIES

PO BOX 642
Palm Desert, CA 92661
(877) 460 7729
(800) 616-2091 FAX
vernon@virtualvestedsolutions.com
(EIN# 47-5256426)

Contact Person(s)

Vernon Wyllie-James (Senior Project Manager & Owner)

RE: JANITORIAL SERVICES

- **Founded in 2015**
- **Family Owned & Operated**
- **Local Business**
- **Micro, Small, Women, Minority & HubZone Business**

Cover Letter

Eternal Love Limited Liability Company dba Vested Solutions

We are interested in providing Janitorial Services at a negotiated rate not to exceed the base price for your Administration and Treatment Facilities in Indio, Riverside County. We are an experienced and qualified Janitorial Services company and we have our corporate office located in Palm Desert. We furnish vacuum, duster, carts, rags, buckets, etc., equipment, machinery, transportation, and other implements necessary to execute the contract. All employees have been trained in appropriate safety measures to ensure Proposer's employees are performing their work in a safe manner.

We hold an active Janitorial Services Registrations with the Division of Industrial Relations (JS-LR-1000741599) in the State of California. *Eternal Love dba Vested Solutions* (47-5256426) is a Micro/Small Business Enterprise (SBE), woman-owned, minority-owned, economically Disadvantaged Business Enterprise (DBE) , HUBZone certified company Federally and in the State of California. We are a family-owned and operated janitorial service LLC (legal formation) company formed in California since 2015. We have no exceptions are taken to any specification requirements or contract terms and condition, or detailed summary of all exceptions taken.

Vested Solutions has over 5 years of Commercial Janitorial Service experience within the Private Sector and Government Agencies. We have the knowledge and understanding of applicable regulations and codes and be familiar with local conditions relating to the project scope and Services. In addition, we have a quality assurance system in place that adequately addresses the checking of analyses and calculations, drawings, specifications, cost estimates, reports, and other supporting documentation for work product delivered in-house.

We currently have worker's compensation insurance, omissions liability coverage in the amount of \$1,000,000 per occurrence, public liability and property damage insurance in the minimum amount of \$1,000,000 per occurrence for injury to or death of one or more persons and/or property damage arising out of a single accident or occurrence and bodily injury and property damage of no less than \$500,000 per occurrence.

We are also registered in the System for Award Management (SAM) database. Since our establishment, we have been successful in providing janitorial service comparable to the scope, type, size, magnitude, and complexity required in this RFP and maintaining a sanitary, safe, and professional work environment. We are highly experienced, qualified, responsible and experts in providing Janitorial/Cleaning Services. And, maintain a high level of cleanliness effectively, and safely for specified Facilities in accordance with the best standards of practice.

Our management team and our administrative team takes a hands on approach in every aspect of the business and we do not subcontract out any of our projects. *Vested Solutions* has NO litigation, claim(s), or contract dispute(s) filed by or against the Respondent, and its subcontractors if any, in the past five (5) calendar years which is related to the services that Respondent provides in the regular course of business.

We do recruiting, training and even working in the field on every project. To meet cleaning objectives minimum staffing requirements must be met. Factors such as occupancy rates, seasonal variations and other considerations should be taken into account when adjusting the staffing plan. To sufficiently clean a building at least one hour of cleaning is necessary per day for 5,000 square feet. The cleaning staff typically works 8 hours per day. The cleaning staff will be maintained to assure proper cleaning of the facility will be maintained. In the event of a shortage of staff, additional trained employees will be provided from the Service Provider to make up the shortage. We do not use Subcontractors and we will notify administration within (7) seven business of a change in personnel assigned to contract.

We agree to be bound by their proposal for 180 days from the Proposal Submission Deadline from proposal due date and proposal amounts for a period of one-year. Both partners understand the scope of work and make a positive commitment to perform the work in a professional and timely manner. These individuals are also the Key Personnel within the company and who will be professionally associated with the development and/or presentation of the proposal.

Vernon Wyllie - James

Statement Of Qualifications

Executive Summary

Custodian: Minimum Custodial Qualifications

- Must have a minimum of (2) Two Years of Commercial Cleaning Experience
- Must be able to read, write and speak fluent in English.
- Must pass a Drug/Alcohol Screening
- Must pass a (10) Ten Year Live Scan background check

Vested Solutions staff every site based on 1 employee per, Team Lead & Site Supervisor at a minimum per 40,000 SQ Ft. This provides Full Time Employment to all 3 individuals. Part Time opportunities is based on need and additional square footage beyond 40,000 SQ Ft.

Vested Solutions begins with our staff. Regardless of their position each staff member is required to do a Mandatory Online and In Person One/One 2 Week Training. During training, each employee goes through a step-by-step process of defining each task associated with their responsibility. The checklists used by the employees are the same checklists used by the other stakeholders responsible for quality assurance. Expectations are clearly understood and employees are instructed to check their work to ensure it is done to standard.

Vested Solutions Management Team will perform visual monthly service inspections, during daylight hours, of all assigned facilities on premises. Immediate steps are always taken to correct any observed irregularities and an electronic and/or written report will be submitted regarding such circumstances to the Contract Administrator or their designated representative. We responds to all emergencies within two (2) hours of notification. And not interfere with the public use of the premises and shall conduct its operations as to offer the least possible obstruction and inconvenience to the public or disruption to the peace and quiet of the area within which the services are performed.

Vested Solutions does not:

- Post signs or advertising matter upon the premises or improvements, thereon, unless prior approval, thereof, is obtained.
- Dispose of hazardous materials on the premises. All such hazardous materials shall be accompanied by Safety Data Sheets (SDS). All such hazardous materials collected on the premises shall be properly stored on a temporary basis and disposed of at an approved disposal site.

Regional Manager - Our Regional Manager visits each site in their region (randomly and unannounced) during the cleaning period to ensure staff is working safely and effectively on a quarterly basis. He/she will be touring and inspecting the work being done to ensure service delivery is meeting or exceeding customer expectations.

Corporate Training and Safety Officer - The Corporate Training and Safety Officer conducts quarterly on-site inspections to ensure safety and cleaning processes are followed. Each location will go through a series of inspections to include observing floor crews and janitors (as they perform their daily duties). These quarterly inspection reports are delivered to the VP of Janitorial Operations and reviewed as a team with the Regional Managers and On-Site Supervisors. Consistency is the overall goal. **Vested Solutions** "tiered" approach to customer site inspections has proven effective because it has the right amount of checks and balances in place to ensure we are both working safely and effectively. The system separates production (service delivery) from quality and allows for objective evaluation and control. It also provides a feedback mechanism in the quality control scorecard that allows management to address issues and concerns in a timely manner.

Vested Solutions also supports weekly, bi-monthly, monthly, and/or quarterly performance evaluation calls with clients to review goals, issues, work orders, future initiatives, and current needs. Current financial needs and expectations of the client will be addressed at this time. Our Managers and Account Representatives are dedicated to providing the best in customer care

Performance Evaluation - The Quality Control Scorecard is the main tool used for quality measurements. Each location serviced is tracked on a Monthly QC Report to ensure a positive trend and consistency. The primary feedback medium is the weekly performance evaluation meeting where management teams (QC, Supervisors, and Managers) from each Region meet with the Senior Project Manager to review and discuss progress on each account (based on quality control scorecards and other relevant key indicators). As previously mentioned, any weaknesses in training, supervision, resources, or personnel are quickly escalated and resolved before they become problematic.

QUALITY ASSURANCE PLAN FOR JANITORIAL WORK

This Quality Assurance Plan (QAP) describes methods that will be used to monitor performance. The QAP establishes methods to assess or evaluate performance. It is designed to provide an effective method of monitoring Performance. Our janitorial services will be performed at the highest standards and not at a lesser frequency than specified in the Part III Service Frequency Schedules in this agreement. We intend to maintain the building in conformance with attachment "A", including the standard described in Association of Physical Plant Administrators (APPA) Janitorial Level 2 in the Specifications.

Our quality control process follows the site-specific scope of work and the data generated by both our customers and our inspections. This data is then analyzed to track performance. This ongoing process keeps track of how we perform and whether we meet our scope of work on a daily, weekly, monthly, quarterly and annual basis.

The key elements fulfilled by Quality Control Management include:

- Review the scope of work
- Conduct inspections and evaluate client feedback
- Collect data
- Create reports and analysis
- Review all reports and analysis and make necessary adjustments

Vested Solutions is committed to providing cutting edge service and our quality assurance program allows us to control and monitor our progress as well as our clients complete satisfaction.

Vested Solutions TQM (Total Quality Management) program consists of the following three core components:

- Formal Employee Training
- Quality Measurement
- Performance Evaluation

Quality Measurement – **Vested Solutions** Janitorial Services uses a “tiered” approach to measure quality. Various levels of inspections occur by different stakeholders to ensure our customers are receiving the best in customer care and service. The following approaches with different degrees of formality are employed.

Vested Solutions will clearly identify and equip each vehicle, used at said facilities, with decals on the exterior right and left front door panels, identifying **Vested Solutions** name, address, and phone number.

On-Site Supervisor Inspections – Informal daily/nightly inspections are performed by the On-Site Supervisor. On-Site Supervisors are responsible for inspecting each customer premise to ensure cleaning standards are being met. They are responsible for OTJ and remedial training. Supervisors are assigned a specific geographic district and the number of accounts is closely monitored to ensure each district is properly maintained.

Quality Control Representative – The QC Representative will be visiting and inspecting customer premises one time per month and will be providing a formal report of the inspection to the Senior Project Manager. The Quality Control Scorecard and inspection process is of vital importance because it:

- Identifies weaknesses in training, supervision, resources, or personnel.
- Is objective and unbiased (QC Representative reports directly to Senior Project Manager).
- Is used as the main tool for measuring performance and has a large weight on performance incentives.
- Is reviewed and discussed weekly on a Regional QC conference call attended by the Regional Project Managers and hosted by the Senior Project Manager.
- Provides the feedback necessary to relay back to the On-Site Supervisors and crews for immediate corrective action (if applicable).

Vernon Wyllie-James

Janitorial Services - Senior Project Manager

(442) 234-2336
vjames718@icloud.com

Meticulous Janitorial Senior Project Manager that oversees janitorial operations that promote a safe environment and a high quality of service to achieve maximum client satisfaction and protect assets with minimum expenses. Demonstrating cleaning expertise, leadership, managerial skills, problem-solving, communication, and teamwork with years of invaluable experience providing porter, custodial, janitorial, and maintenance services management in high-traffic areas such as Casinos, Airports, Healthcare Facilities, Schools, and Construction sites.

As the Senior Project Manager, I work directly with the clients alongside the head of the Administrative Support team. I assign all employees to each site. I am actively engaged with the on-site Manager, Team Lead, Assistant Team lead, and Custodial Staff assigned to my designated account. I oversee and review all bi-weekly inspections performed by the Site Manager.

As the Project Manager, I oversee the management and performance of services provided and promptly troubleshoot with the Site Manager to resolve any questions or problems. I attribute our continued success to developing and retaining quality and seasoned management and personnel. This is another attribute that sets Vested Solutions apart from the competition. For continuous growth and success in a highly competitive janitorial services industry, Vested Solutions must serve our clients by understanding their requirements and committing to fulfill them.

SKILLS & PROFICIENCIES

- Occasional off-site travel up to 10% of the time for meetings.
- Customer satisfaction Monitoring
- Direct the daily activities. Responsible for the management of all company projects, manages the overall activities of each project, and supervises the and assign projects to the Project Management Team.
- Coordinates and controls special project work.
- Carry out supervisory responsibilities in accordance with the company's policies and applicable laws
- Coordinates & create schedules & Issues assignments for custodial professionals.
Maintains/monitors work schedules of all personnel for three shifts, including the preparation and submission of weekly payroll time sheets. Review staffing levels to ensure proper productivity for each day's work. Establish and implement periodic schedules and procedures for the custodial program.
- Supervises and coordinate custodial professionals daily projects and janitorial operations within a facility
- Supervises basic & deep cleaning tasks
- Provide Quality Assurance review of daily operations to ensure areas are cleaned correctly
- Oversee inspections, quality control measures, inventory control and staffing on all projects.
Performs regular inspections of resident, ancillary, and communal areas for sanitation, order, safety, and comfortable environment.
- Manage the company's quality control monitoring and safety programs for all company projects.
Ensure that all facilities are safe and comply with all federal, state, and local laws.
- Strong knowledge of chemicals and proper use of PPE to promote stringent adherence to OSHA and safety guidelines
- Ensure that environmental procedures and issues are being implemented through the direction of the customer's environmental specialist representative.

- Rolled out and improved training for custodial professionals on safety operations of chemicals, cleaning agents, cleaning equipment, tools, and devices.
- Implemented preventative maintenance practices and upheld equipment guidelines to reduce downtime
- Promotes a clean & orderly facility
- Ensures a smooth flow of daily tasks
- Ensures efficiency of floor maintenance to reduce harm
- Ensures safety protocols for staff and clients
- Develop and implement employee incentive programs to promote top performance
- Investigate client complaints
- Investigates new and improved cleaning instruments and methods
- Inventory Control
- Supplies & Equipment Purchasing
- Knowledge of workplace safety & security procedures
- Swept, vacuumed, scrubbed, and waxed all floors of the assigned area
- Gathered, moved, and disposed of all debris, dirt, and snow to designated locations.

AFFILIATIONS & MEMBERSHIPS

Eternal Love (Non-Profit Organization)
Regency Christian Center
NSBA (National Small Business Association)
Coachella Valley Chamber of Commerce
California Chamber of Commerce
US Black Chamber of Commerce
SCMSDC
(Southern California Minority Supplier Development)

EDUCATIONAL BACKGROUND

Kings County Community College
 Brooklyn, NY
 Business Administration, AA

Summit College
 San Bernardino, CA
 Electrical Degree - Electrician Certification
 OSHA 30



California Secretary of State
Electronic Certified Copy

I, SHIRLEY N. WEBER, Ph.D., Secretary of State of the State of California, hereby certify that the attached transcript of 1 page is a full, true and correct copy of the original record in the custody of the California Secretary of State's office.



IN WITNESS WHEREOF, I execute
this certificate and affix the Great
Seal of the State of California on
this day of February 11, 2021

SHIRLEY N. WEBER, Ph.D.
Secretary of State

Verification Number: 5VD5B7
Entity (File) Number: 202104210794

To verify the issuance of this Certificate, use the Verification Number above
with the Secretary of State Electronic Verification Search available at
bizfile.sos.ca.gov





California Secretary of State Electronic Filing



LLC Registration – Articles of Organization

Entity Name: Eternal Love Limited Liability Company

Entity (File) Number: 202104210794

File Date: 02/08/2021

Entity Type: Domestic LLC

Jurisdiction: California

Detailed Filing Information

- 1. Entity Name: Eternal Love Limited Liability Company

- 2. Business Addresses:
 - a. Initial Street Address of Designated Office in California: 10596, San Pablo Road
Desert Hot Springs, California 92240
United States

 - b. Initial Mailing Address: PO Box 642
Palm Desert, California 92260
United States

- 3. Agent for Service of Process: Sadiyyah T Wyllie-James
10596 San Pablo Road
Desert Hot Springs California 92240
United States

- 4. Management Structure: More than One Manager

- 5. Purpose Statement: The purpose of the limited liability company is to engage in any lawful act or activity for which a limited liability company may be organized under the California Revised Uniform Limited Liability Company Act.

Electronic Signature:

The organizer affirms the information contained herein is true and correct.

Organizer: Sy WyllieJames

Certificate Verification Number: 5VD5B7
Use bizfile.sos.ca.gov to verify the certified copy.

State of California
Department of Industrial Relations
Division of Labor Standards Enforcement
Licensing & Registration Unit
1515 Clay Street, Ste. 1902
Oakland, CA 94612



Registration Number:
JS-LR-1000741599

Janitorial Services Registration

REGISTRANT WITH NO EMPLOYEES

Effective Date 06/21/2023	Expiration Date 06/20/2024
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Eternal Love Limited Liability Company
74127 El Cortez Way
Palm Desert, CA 92260

Workers Compensation Insurance Expiration Date:
January 13, 2023

Having paid to the Labor Commissioner of the State of California the required Registration Fee is hereby granted a registration to conduct the business of Janitorial Services in the State of California at the location(s) listed above and effective for the period designated above in conformity with the provisions of Chapter 4, Part 4.2, Division 2 of the Labor Code and the rules and regulations issued thereunder by the Labor Commissioner.

THIS REGISTRATION IS NOT TRANSFERABLE AND IS VALID ONLY AT THE REGISTERED OPERATING LOCATION INDICATED ABOVE

POST IN A CONSPICUOUS PLACE

ALTERATIONS WILL VOID THIS REGISTRATION

North County Transit District

Scott Lloyd, CFM, PMP

sllloyd@nctd.org

760.966.6688

Director of Facilities

State of California - Riverside DMV Investigative Unit

Janine Franco | Management Services Technician

Investigations | Inland Command Office

Janine.Franco@dmv.ca.gov

951-697-6779

State of California - Van Nuys DMV

Ada Davis | Contracts Administrator

(916) 818.2847

Ada.Davis@dmv.ca.gov

Isaiah Pinckey Cleveland, Ohio

(7) Office Buildings

(917) 753 - 6056

izz01@icloud.com

Power House World Ministries (8 Churches) Baltimore, Maryland

Contact: Bishop Winslow Jr.

PowerHouseWorldMinistries@gmail.com

(443) 257-1824

1. Personnel shall not open drawers or cabinets except to access approved supplies or with the express permission.
2. Items left on desks or other surfaces shall not be disturbed.
3. **Vested Solutions** will report conditions such as leaky faucets, plugged drains, or broken fixtures, etc. to
4. **Vested Solutions** will report equipment and facility damage immediately.
5. **Vested Solutions** will report accidents and injuries immediately.
6. **Vested Solutions** will provide a current copy of a valid Federal or State U.S. government-issued photo identification for all personnel prior to their placement for work at the project site.
7. **Vested Solutions** must comply with immigration requirements related to the right to work in the United States.
8. **Vested Solutions** personnel shall have valid, U.S. government-issued photo identification with them at all times while on property. No employees shall be allowed to work in the building without this identification.
9. All cleaning personnel shall wear protective gear appropriate to the task being performed. A minimum standard for protection shall be as specified per CAL/OSHA requirements. Examples include but are not limited to: eye protection, clean heavy gloves, appropriate shoes, mask to protect against splashing liquids, etc.
10. All cleaning personnel shall conduct themselves in an appropriate manner at all times.
11. Personnel who behave in an inappropriate manner shall be removed immediately and may be banned from the site.
12. **Vested Solutions** will respond to all service complaints no later than the next business day.
13. **Vested Solutions** will be present for joint inspections and/or on-site meetings to ensure that all contract specifications are being met.
14. All cleaning personnel shall wear a company uniform.
15. **Vested Solutions** will prepare for review and approval a schedule of which tasks will be performed daily, weekly, monthly, quarterly, and annually. This schedule shall indicate the specific days that each task will be performed. The first calendar shall be provided within ten days of initial contract execution.
16. **Vested Solutions** will provide, upon request, a record of days and hours worked by all cleaning personnel.

Locations:

Valley Sanitary District
45500 Van Buren Street
Indio, CA 92201

Twice a Week

Maintenance Building
Maintenance Trailer
Collection Services Building

3x's - Weekly

Administration Building
Operations Building
Lab Building

Janitorial Closet

- Stock supplies for the night

Janitorial Storage Closets (Each Occurrence):

- a. Mops rinsed clean after use and hung properly to air dry.
- b. Room cleaned and equipment neatly stored.
- c. Janitorial closet clean and orderly

Office Areas/Conference Rooms/Lobby/Mail Room/Common Area

- **Clean glass in doors**

Glass and Mirror Cleaning

1. Glass and mirrors accessible surfaces cleaned will be without streaks, film, smudges, deposits and stains with a uniformly bright appearance and adjacent surfaces wiped clean.
2. Glass surfaces will include, besides windows and mirrors, all display cases, and cabinets, building directory board enclosures, picture frame enclosures and glass panels within or adjacent to interior and exterior doors.
3. Mirrors will be cleaned using an approved Glass Cleaner.
4. Mirror/Glass Cleaning includes interior and exterior glass doors and surrounding glass areas to include sills/ledges, display cases, glass cabinets, mirrors, and adjacent trim so that after cleaning there shall be no traces of film, dirt, smudges, water or other foreign matter. All accessible glass surfaces shall be without streaks, film deposits and stains and have a uniform bright appearance.
5. Clean Door Glass and Cabinet both sides and wipe dry leaving glass transparent and free of streaks and smudges. All dirt, grease, insects and foreign material shall be cleaned from sashes, sills, jambs and mullions.

1. Clean Entrance Door and/or Hallway Door Glass and wipe dry leaving glass transparent and free of streaks and smudges. All dirt, grease, insects and foreign materials shall be cleaned from sashes, sills, jambs and mullions.
2. Clean Exterior of Glass Entrance Area and wipe dry leaving glass transparent and free of streaks and smudges. All dirt, grease, insects and foreign material shall be cleaned from sashes, sill jambs and mullions.

- **Wipe down all surfaces including, door frames, windowsills, file cabinets, counters, etc. Remove smudges from kick plates, handrails, walls, and light switches**
- **Remove all cobwebs**
- **Empty all trash cans and reline**

Trash Containers

1. Properly cared for trash receptacles(s) will be emptied, cleaned, and left dry, free of sludge, deposits, dirt, streaks, and odors both inside and out. Trash receptacle refers to all receptacles used for the collection of wastepaper and debris, including swing top containers, wastebaskets, and similar containers.
2. All trash receptacles will have a new plastic trash can liner installed each time after the trash is removed and the receptacle has been cleaned.
3. Replace Trash Can Liners with liners compatible with trash can size.
4. Wash Trash Cans using a neutral detergent solution, (germicidal cleaner for rest room trash can), leaving the trash can clean and free of odor.

Trash Receptacles

1. Empty all trash receptacles indoors and outdoors and replace liners daily. All trash must be bagged before it is placed in dumpster. The interior and exterior of trash receptacles will be free of trash, liquid, gum, grease and other foreign substances and be odor free.
2. Trash receptacles which are found to contain liquids or other substances, which could cause odors, shall be washed and dried before new liners are installed.
3. No trash should be placed on the ground or on top of the trash container.
4. Break down all cardboard boxes and place in proper recycle bin.
5. Paper recycling containers: Empty daily the recycling container into the appropriate collection dumpster.

Removal of Trash and Recycle Containers

- To include the removal and disposal of trash from trash receptacles and recycling containers, as well as trash in boxes, bags or other items marked "trash" and placed next to trash containers or in hallways.
- Also includes picking up trash from all exterior trash containers and removing cigarette butts from urns and maintaining clean urns with fresh sand.
- **Vested Solutions** will comply with any current or future recycling program(s) established by the state, the county, the municipality.
- **Vested Solutions** will provide trash and recycling dumpsters in various locations on each location.

Custodial Crew will empty and return to their location waste baskets, other trash containers within the area (including trash containers within six (6) feet of the exterior of all buildings/facilities). Janitorial Services crew will empty and return to their original location bathroom waste baskets, sanitary napkin disposal containers, and other trash containers within the area. Plastic trash liners will be placed in waste receptacles and replaced when soiled or torn. Interior & exterior of trash receptacles shall be cleaned as required to assure cleanliness. Janitorial Services crew will dispose of trash in plastic bags secured with a bag tie. Custodial Crew will pick up any trash that may fall in or around the building during the removal of collected trash. Custodial Crew will deposit the trash in the outside trash collection point (trash bin).

Emptying Waste Bins

1. All waste bins must be emptied and plastic liners replaced.
2. Any plastic liner with food wastes or that is soiled or leaking must be replaced with a new plastic liner.
3. Waste bins must be washed inside and outside utilizing a disinfectant as needed to remain free of odors.
4. After washing, bins must be wiped dry and new plastic liners installed.
5. All ashtrays and ash receptacles must be emptied and cleaned free of tobacco residue.
6. Boxes, cans, bottles, and other items placed adjacent to waste bins and marked "TRASH" must also be removed and disposed of.
7. All waste collected must be disposed of in the nearest outside trash collection point.
8. Waste that falls on the floor and outside grounds during the waste removal must be picked up and disposed, including cigarette butt receptacles, within the building and outside the building

• Arrange furniture and magazines in reception waiting area

1. All furniture is returned and arranged neatly including desk and conference room chairs

• Disinfect conference room tables, chairs, counters, exterior of cabinets, sinks, handrails, etc. Vacuum all carpet areas and mats

• Vacuum all carpet areas and mats

Vacuum all carpeting and sweep all non-carpeted floor space including hallways.

1. A properly vacuumed floor, carpet, elevator, and stairway will be free of all dust, dirt, cobwebs, grit, and lint. This includes debris in corners, behind doors, and under furniture (except permanently positioned items, such as built-in, safes or file cabinets). Removal of chewing gum or other foreign matter is considered part of vacuuming process.
2. Vacuuming Carpets and Rugs
3. Carpeted areas, rugs, and mats must be vacuumed free of all loose soil and debris.
4. Remove all paper, gum, rubber bands, staples, paper clips and foreign matter from the carpet. Then use an approved carpet vacuum to remove surface soil and embedded grit from all areas accessible to the vacuum. Chairs and trash receptacles shall be moved to vacuum underneath, and then replaced in their original position

1. Rugs, carpets and floor mats - Cleaning Walk-off Mats
 2. Each time floors are swept/dust mopped or vacuumed, walk-off mats in that area must be cleaned. Soil and moisture underneath mats must be removed and the floor must be cleaned as appropriate along with the rest of the floor.
 3. The mats must be returned to their original locations afterwards.
 4. Officer (CO), all walk- off mats worn out to the point of being ineffective.
-
- **Sweep and mop all hard floor surfaces including rolling mats in offices and cubicles**
1. Custodial Crew will clean all tile and/or linoleum floors, including corners and abutments so that they are uniform in appearance and are free of streaks, swirl marks, detergent residue, or any evidence of stains, soil film, debris or standing water. Chairs, trash receptacles, and easily movable items will be moved to clean underneath and returned to their original location when cleaning has been completed. Janitorial Services shall remove all splash marks on furniture, walls, baseboards, etc. Custodial Crew will clean bathroom tile floors, including corners and abutments so that they are uniform in appearance and free of streaks, swirl marks, detergent residue, or any evidence of stains, soil, film debris or standing water. Custodial Crew will ensure that the mop used to clean the bathroom floor is not used on any other common floor area. Custodial Crew will display caution signs when floors are wet and personnel other than Janitorial Services personnel are present in the area. Signs will remain in place until floors are completely dry.
 2. Custodial Crew will maintain all tile and/or linoleum floors accessible with a floor cleaning machine, unless specified elsewhere as having carpet or special flooring. After tile and/or linoleum floors receive floor maintenance, the entire floor shall have a uniform coating of nonskid finish and have a uniform glossy appearance and be free of scuff marks, heel marks and other stains and discoloration. Janitorial Services crew will remove floor finish solutions from baseboards, walls, furniture, trash receptacles, etc. Chairs, trash receptacles and easily movable items shall be tilted or moved to maintain floors underneath and returned to their original location when maintenance has been completed. Custodial Crew will apply these techniques only to the portion of the floor needing work to bring the entire surface up to the above stated standard. Janitorial Services shall not apply finish on surfaces that have not been cleaned.
 3. Sweep using soft hair brooms sprayed with a non-oily sweeping compound. Sweeping shall leave the surfaces uniformly clean of all dust and surface dirt including corners and places inaccessible to the broom. Surface accumulation of hardened dirt that cannot be loosened with the broom.
 4. Dust Mop using floor mops treated with a non-oily floor mop dressing. Dust mopping shall leave the surfaces uniformly clean of all dust and surface dirt including corners and places inaccessible to the mop. Surface accumulation of hardened dirt that cannot be loosened with a mop shall be loosened sufficiently to permit removal by dust mopping.

- Damp Mop using a clean mop and clean water or neutral detergent. Dust mop floor immediately prior to damp mopping to remove loose dirt and dust. Damp mopping will leave the floor clean and free from streaks, stains and film. Scrub heavily soiled areas as needed with mop or other scrubbing equipment and strong cleaning solutions to remove all heavy soil, stains, and traffic marks. There will be no splashes left on walls, baseboards, furniture and other adjacent surfaces and floor shall be left damp not wet. If strong cleaning solution is used, floor shall be rinsed with clean water.
- Concrete/quarry tile, terrazzo, metal, wood, and resilient flooring must be swept or dust mopped to remove all loose dirt, dust, and debris.

Restrooms

- **Clean and disinfect all urinals, toilets, mirrors, counters, sinks, shower stalls**

1. Restroom fixtures, including water closets, urinals, lavatories, and sinks must be washed inside and outside utilizing a disinfectant, and must be free of stains and odors. Pumice sticks and toilet bowl cleaner must be used to remove stains from urinals and water closets. Brushes, sponges, and cloths that have been used to clean any other part of the restroom (including water closets, urinals, walls, floors, and partitions) must not be used to clean lavatories or sinks. Floors must be swept/dust mopped free of dirt and mopped with a disinfectant. Wainscoting, partitions, walls, and doors must be cleaned free of dirt, stains, and graffiti.
2. Mirrors must be cleaned and polished.

- **Clean and polish all bright work and dispensers**

1. All metal fixtures and hardware must be cleaned. Waste bins must be emptied, disinfected, and plastic liners replaced. If present, shower stall rooms and locker/dressing rooms must be considered part of the restrooms and cleaned accordingly.

- **Spot clean walls, partitions, and light fixtures**

- **Empty trash cans and reline**

- **Sweep /mop all floors and clean exhaust fan grating**

- **Wipe down tops of partitions, dispensers**

- **Restock all products including toiletries, soap and paper products**

1. Restroom supply dispensers (paper towels, toilet tissue, soap, and hand sanitizer) must be replenished. Stock restrooms with sufficient supplies to ensure that the supplies must last until the next scheduled service. If dispensers become empty before the next scheduled servicing, replenish them at no additional cost.
2. Refill C-fold towels within wall dispensers.
3. Refill C-fold towels in counter dispensers throughout, except at 2nd floor.

- Refill toilet seat cover dispensers.
- Refill hand soap dispenser.
- Refill toilet paper within stall dispensers.

Lunchroom/Lunchroom areas

- **Clean and disinfect chairs, tables, counters and exterior of cupboards**
- **Clean microwaves in and out**
- **Clean and sanitize all sinks including garbage disposal**
- **Wipe down outside of appliances and lighting fixtures**
- **Restock paper towels**
- **Sweep and mop all floors**
- **Turn off coffee makers**

Clean all break rooms

1. Clean and wipe off all surfaces, including the top of snack machines, TV, tables, and counter tops with odorless disinfectant cleaning solutions.
2. Clean and disinfect microwave ovens. Wipe chairs and/or brush off upholstered chairs. R
3. Replenish all paper towel dispensers with properly fitting towels.
4. Empty waste and recycling receptacles and dispose of properly in the Office Trash & Recycle Room #P118. Disinfect receptacles and replace liners if needed. Spot clean receptacles as needed to maintain them in a clean and sanitary manner. Return receptacles to original location.
5. Clean all sinks and wipe dry.
6. Clean all countertops and wipe dry.
7. Refill paper towel rolls throughout, except at 2nd floor.
8. Refill dish soap.

Outdoor

- **Empty trash cans and reline, remove cobwebs**

- **Turn off all lights and fans prior to departing**
- **All doors and windows are closed and secure**

Employees WILL NOT

- Leave any exterior doors left propped open at any time!
- Certain internal doors that are NOT to be left open during nightly cleaning.
- Bring guns, illegal knives or other dangerous weapons allowed on premises.
- Bring dangerous or other prohibited substances, including alcohol or drugs allowed on premises.
- Allow unauthorized persons, including children, shall be allowed on premises.
- Smoke or vape inside any facility. And only allowed in designated areas outside the facilities.
- Use City telephones

Vested Solutions Management Team will:

- Ensure that all entrances and exits in each area are secure during nightly operations and checking that all doors and windows are locked prior to exiting.
- “Arm” and “Disarm” facilities and will be trained on the arming/disarming procedures for each site.
- Enforce security rules as they apply to all personnel.
- Have vehicles clearly identified as belonging to the contractor and will clearly display a vendor supplied parking tag where required.
- Provide Weekly schedule forms
- Will prohibit employees from disturbing papers on desk (must dust/clean around items on desk), opening desk drawers and cabinets, or using the telephones, computers, or office equipment.
- Will require employees to comply with instructions pertaining to conduct and building rules and regulations.
- Will ensure all applicable employment laws are followed.
- Will provide adequate supervision of employees to ensure complete and satisfactory performance of all work in accordance with the resulting contract.
- Will be responsible for turning off all lights when not needed for the cleaning that room, and all lights are to be turned off at the end of the shift.
- Will ensure all doors are shut and locked after cleaning.
- Will ensure employees do not have access to the **Valley Sanitary District Janitorial Services** building unless on official duty.
- Will conduct a national criminal background check on all prospective employees before hire for the **Valley Sanitary District Janitorial Services** premises.
- Will notify the **Valley Sanitary District Janitorial Services** of any observed irregularities (i.e., defective plumbing, unlocked doors, lights left on, etc.)
- Will provide a quality assurance review report and meet with the **Valley Sanitary District Janitorial Services** representative monthly or as requested to discuss service quality assurance reviews report. These meetings will be held at a mutually agreeable time.

- Will take all steps necessary to protect the public and nearby property from damage during custodial activities.
- Will ensure all keys are maintained in accordance with the **Valley Sanitary District Janitorial Services** key procedure.
- Will maintain a Safety Data Sheet (SDS formerly MSDS) file on all chemical and cleaning agents used in the performance of this contract.
- Will make accommodations to clean sensitive areas at specific days and times if requested by the building occupants.
- Provide a designated extension for our general services number (877) 460-7729. This extension will directly be answered by the designated Project Manager as the 1st point of contact, followed by additional members of the Management Team. If unavailable once a voice message is left calls will be returned within an hour. This same number will be used for Emergency Calls.
- One member of the Management Team with a minimum of (3) three years of janitorial and supervisory experience combined will be on the Job Site at all times while work is being performed to provide the necessary supervision to ensure work is completed as specified under the contract.
- Will report all stopped drains, broken fixtures, glass, burnt out lights, and other facilities maintenance needs to the **Valley Sanitary District Janitorial Services** representative on the established computerized email request.
- Provide a designated Project Manager that will serve as the initial point of contact. This project manager will be located in our satellite office located within **Valley Sanitary District Janitorial Services**.

Vested Solutions employees WILL

- Have Physical Ability to Perform Work
- Have Proper Conduct by conducting themselves in a proper and efficient manner at all times and shall cause the least possible annoyance to the public.
- Wear a Uniform at all times that is neat and clean bearing the company's identification.
- report for duty **Valley Sanitary District Janitorial Services**-approved uniforms with the Company logo and approved photo ID badges while on **Valley Sanitary District Janitorial Services Property**.
- Be able to communicate in English both verbally and in writing.
- Provide all work under this contract shall be performed in such manner as to provide maximum safety to the public and, where applicable, to comply with all safety standards required by OSHA.
- Maintain all work sites free of hazards to persons and/or property resulting from operations.

Upon finding illegally dumped debris which might reasonably be considered hazardous to the health and/or safety of staff, the public, the landscape environment and/or adjacent properties, shall adhere to the following procedures:

1. Cordon off the area where the material has been found, to the extent possible;
2. Immediately call 911 (Fire Department) and provide all relevant information possible:
3. Finder's name and company
4. Specific location of material

Try to determine:

1. Number, size, and types of containers
2. Description of labels
3. Spillage to soil, pavement, water
4. Description: solid, liquid, color
5. Any danger to public

Inform the appropriate supervisor and the **Valley Sanitary District Janitorial Services** Contract Administrator as soon as possible.

1. Remain at site until the Fire Department arrives.
2. Do not move, touch, or sniff any of the material.

All Janitorial Services will be performed on a Level 1 - Orderly Spotlessness Status that will leave facilities to the following standards and provide restrooms that are clean, sanitized, stocked and odor free throughout the day.

- Floors and base moldings shine and/or are bright and clean; colors are fresh. There is no build up in corners or along walls.
- All vertical and horizontal surfaces have a freshly cleaned or polished appearance and have no accumulated dust, dirt, marks, streaks, smudges, or fingerprints.
- Washroom and shower tile and fixtures gleam and are odor free. Supplies are adequate.

BENEFITS

- Higher level of cleaning
- Reduced Insurance Cost
- Reduced Turnover
- Increased Customer Service

Vested Solutions uses Quickbooks Accounting System and Budget and perform General Accounting Principle(GAP) practices based on Cost Accounting per Project within the Private Sector and an individual Government Agency. This software ensures high-quality invoicing and reporting. Expenses including payroll are separated and classified based on Site. We have a 4 member team within our Accounting Department headed by our Senior Administrator.

- **Planning** – Identify goals, objectives, methods, and resources needed.
- **Organizing Resources** – Organize Human Resources and administrative functions.
- **Leading** – Establish strategic direction – vision, values, mission, and goals.
- **Coordinating** – Ensure systems, processes, and structures are effective. Ongoing feedback and monitoring.

The **Vested Solutions** Executive Account Manager will attend scheduled meetings during the term of this Agreement when requested by either party. Should either party request a meeting, the other party shall respond within twenty-four (24) hours with an agreed-upon day and time, to take place within forty-eight (48) hours. All meetings shall take place.

Our employees will wear uniform shirts that bear the company name or logo identifying them as employees and always be properly attired for work in an office environment. Modest apparel shall include a smock, shirt or uniform with the name/logo imprinted. Apparel shall always be maintained in a well fitted, neat and clean condition. There will be no exception to this requirement. There will also be a “no tobacco use” policy.

With our Executive Team and On-Site Team, Vested Solutions will provide **Valley Sanitary District Janitorial Services** with professional, satisfactory cleaning services and deliver the image of excellence. Our services are timely, and operations run smoothly. We customize services for each client to make sure that the service we provide is beneficial. We implement a detailed job description and schedule to give to our custodial professionals. We detail the expectations of our clients and provide clear and understandable directions. We create real value for the organization we are servicing by going above and beyond our daily needs. We ensure our clients and their patrons will be greeted with a clean facility.

Key personnel will be available to the extent proposed for the duration of the project acknowledging that no person designated as “key” to the project shall be removed or replaced without the prior written concurrence.

We do hands-on training with our entire staff from the Site Manager to the Custodial Professional. Our training is a week long training process that consists of:

- Online Video/Quiz Individual training on cleaning, chemicals and equipment.
- Group Online Video, Discussion, Q&A Sessions
- On Site One on One Shadowing and Training with Site Manager
- On Site Training & Quality Assurance Training

If an employee receives a correction from the Site Manager while completing a task the employee must shadow for the rest of the shift and work One on One with the Site Manager for on the job training. If an employee receives a complaint after a task is complete due to inadequate cleaning services via notification from a client the employee is required to repeat training despite their position and/or length of experience. All employees are assigned a task list that must be signed off on after each shift. This process helps identify the responsible employee, Team Lead and Site Manager involved in the complaint. Once this is identified the steps for necessary additional Job Training for everyone involved is required.

We provide on-site supervisory personnel of a high caliber including bilingual communication ability and all crew members have a working knowledge of English.

Every Team Member is required to complete a series of video training that will educate them on the required cleaning practices and safety regulations of each task prior to going on site. Each video has a scored test that the employee must pass prior to going on site. Upon completion of the video, training employees shadow a seasoned Team Lead or Site Manager to go through detailed training based on the Scope of Work for the client. Each client has a specific policy and procedure cleaning manual that pertains to their scope of work that is readily available to the client upon request.

Vested Solutions Cleaning Services can be very beneficial to **Valley Sanitary District Janitorial Services** and will keep the facility in a clean, healthy, and safe environment.

Employee/Management Security Policy

- Provide a work schedule tailing custodians assigned to each location and the hours and break times of each shift. To insure there is always coverage, custodians may not take lunches or breaks at the same time. Any time a person is off for vacation, or a substitute fills in for sick days etc.... a call to the Verification Line is to be made no less than one hour prior to that replacement - to include name and badge ID numbers. At no time will be short one facility to provide coverage for another.
- Only individual assigned to this job will be authorized in the building
- Turn off lights upon completion of cleaning operations
- Prior to leaving the building each night, check to see that all outside doors are locked and that the building is secure and arm Alarm.
- We will not share Valley Sanitary District Janitorial Services issued keys or badges with other personnel.
- Ensure doors and windows are closed and secured at the completion of each shift when performing custodial work in a building.

Our employees will conduct themselves in a professional manner and to follow all rules and regulations while providing custodial services in **Valley Sanitary District Janitorial Services**. *Vested Solutions* follows all applicable federal, state and local environmental, health and safety regulations. All employees are in compliance with the OSHA hazard communication and blood-borne pathogens standards as it pertains to training, safety, and equipment.

- **Vested Solutions** furnish all labor, supervision, tools, equipment, cleaning supplies, and transportation necessary to satisfactorily perform services detailed in the scope of work, conforming to the cleanliness specifications stated herein.
- **Vested Solutions** provide the required services in a proper and skillful manner and to a professional standard as described in this Performance Work Statement (PWS).
- **Vested Solutions** will manage the total work effort associated with the janitorial services required herein to assure fully adequate and timely completion of these services. Including a full range of management duties including, but not limited to, planning, scheduling, and quality control.
- **Vested Solutions** furnish all a minimum quantity of (4) four for all materials, cleaners, brooms, brushes, treated and untreated clothes, wet mops, disinfectants, spray cleaners, sponges, squeegees, glass cleaners, floor finish, metal polish, scouring powder, any necessary supplies, materials or equipment and trash can liners and equipment needed to perform the work covered in this contract. And cleaning equipment including vacuum cleaners, mop buckets, brooms, mops, dusters, floor machines, and cleaning products necessary to carry out the performance of the requirements herein.
- **Vested Solutions** bares any cost incurred in preparation, transmittal or presentation of this proposal or material submitted in response to this RFP solicitation.
- **Vested Solutions** will provide all labor and materials, including but not limited to all paper towels, toilet paper (Charmin two-ply or equivalent), soap, hand sanitizers, batteries, and air fresheners and/or cartridges, including stocking supplies in all restrooms during cleaning and disinfection days (ensure there are at least five (5) rolls of toilet paper, and two (2) seat cover boxes in restroom cabinets) to perform the required janitorial services work.
- **Vested Solutions** is solely responsible for fulfillment of all requirements of the contractual agreement with a state agency which may derive from this RFP.
- **Vested Solutions** does NOT use subcontractors.
- **Vested Solutions** will provide an adequate work force to complete work in accordance with the time and quality standards specified herein.
- **Vested Solutions** agrees to be bound by the General Requirements contained in this RFP
- **Vested Solutions** will assign an on-site supervisor who will have overall responsibility for the performance of the services and who will be able to promptly resolve any questions or problems that arise.

The Project MANAGER will: (Vernon Wylie-James)

- Ensure employees perform in an orderly, responsible and courteous manner.
- Provide any and all safety apparatus necessary to protect employees so they may operate equipment safely.
- Provide additional personnel, twenty-four hours per day, seven days a week, including holidays, at a fixed hourly rate for special events, projects, or emergencies if so requested.
- Ensure employees adhere to the same professional and ethical standards of conduct required of Government personnel.
- Provide a detailed description of all hiring, training, testing, and disciplinary policies and procedures used.
- Replace immediately any employee(s) when requested to do so by **Valley Sanitary District Janitorial Services**.
- The Administrator on or prior to the first day of work, submit a supervisory chain of command document identifying personnel names and telephone numbers, providing updates as necessary.
- Coordinate with the Administrative Team and Site Manager weekly to determine the scheduling and cleaning supply replacements which include equipment, supplies, materials, and chemicals. Once these items are identified the Administrative Team will provide a weekly report to **Valley Sanitary District Janitorial Services** assigned Staff of these notated items. A report will be given even if there are zero items needed for replacement.
- The Executive Account Manager will ensure all abatement is documented by the Site Managers, Team Leads, and Custodians with dated pictures.
- Conduct routine inspections of the facilities based on standards for commercial facilities within the maintenance industry.
- ENSURE THAT SUFFICIENT INSPECTIONS ARE MADE TO GUARANTEE THE SERVICES ARE PERFORMED AS SPECIFIED
- Comply with Safety Data Sheets (SDS) standards, and be used in conjunction with necessary safety equipment. They will be on-site and available for all chemicals stored and used within a service area on the first day of the contract. And post copies of SDS (Safety Data Sheets) for all chemicals used in each custodial closet in compliance with OSHA Hazard Communication Standard.
- Ensure all staff wear a uniform that is neat and clean with the company name permanently affixed. Uniform will consist of a shirt, pants, hat, and closed-toe and heeled shoes.
- Ensure the Janitor Closet and equipment is maintained safely and cleanly.
- BE ON-CALL AT ALL TIMES FOR EMERGENCIES AND MUST BE ABLE TO REPORT WITHIN THREE (3) HOURS TO ANY OF THE LOCATIONS COVERED BY THIS CONTRACT.
- ADEQUATELY TRAINED IN THE COMPLIANCE OF ALL APPLICABLE OSHA, EPA, AQMD, AND OTHER FEDERAL, STATE AND LOCAL LAWS AND REGULATIONS REGARDING MATERIALS AND EQUIPMENT THAT MAY BE ENCOUNTERED IN THE PERFORMANCE OF THE SERVICES.
- Ensure minimal staff turn-over & applicable background check.

Management and Staffing Plan

Administration

- Will submit semiannual reports to **Valley Sanitary District Janitorial Services** during the length of the Contract. The first report is due by the end of the first week of the fourth month of the Contract, and subsequent reports are due every six months from that date for the duration of the Contract.
- Provide a dedicated customer service representative to service **Valley Sanitary District Janitorial Services** account.
- Provide a list of all workers assigned to the office to perform services under this Agreement. Prior to authorizing replacement workers to perform services under this Agreement, **Vested Solutions** will provide twenty-four (24) hours of advance written notice of any changes to the list of assigned workers throughout the term of this Agreement.
- Provide a detailed Work Plan to include staffing levels and proposed schedules for review and approval by **Valley Sanitary District Janitorial Services** staff within thirty (30) days of Notice to Proceed.
- Provide and maintain a sign-in log at each facility. This log will note the arrival and departure of all staff. This Weekly supervisor report will contain hours expended and a number of staff used to be kept at each facility for inspection by the Facilities and Fleet Manager.
- Supply **Valley Sanitary District Janitorial Services** FM Manager –Operating Facilities a complete inventory of all supplies used, by facility, listing type and quantity, for the previous year no later than January 15th.
- Provide a Monthly inventory usage report to **Valley Sanitary District Janitorial Services** by the first of each month.
- Implement a time tracking system for all janitorial employees with facility-specific time stamping.
- Will store and digitally file the weekly, monthly, and quarterly Service Log Book & Quality Assurance Check List.
- The Administrator maintains complete and accurate records with respect to all costs and expenses incurred under this Agreement. All records shall be clearly identifiable. A representative of **Valley Sanitary District Janitorial Services** will be allowed during normal business hours to examine, audit, and make transcripts or copies of such records and any other documents created pursuant to this Agreement.
- We will provide itemized invoices to include monthly costs for a given time period, and include the number of employees and hours assigned to the project.
- The Administrator will be responsible for implementing a report that will be issued weekly to **Valley Sanitary District Janitorial Services** that is approved by the Project Manager and Site Manager for cleaning supply replacements. This report will be issued even if there are zero items needed for replacement.
- Provides a list of all required cleaning products and paper products prior to contract commencement and beginning of each month to **Valley Sanitary District Janitorial Services**.

Site Supervisors & Team Leads:

Vested Solutions is very proud of our full-time, professional Janitorial Specialist (Team Leads). They are keys to the successful performance of our cleaning operations. Their skills in employee training and motivation along with onsite quality control ensure the highest level of janitorial services provided that meets and exceeds management and the client's expectations.

Our Site Supervisors & Team Leads are constantly spot-checking and thoroughly inspecting custodians' work and providing on-the-spot training when needed. This enhances their existing janitorial skills and ensures client satisfaction. They log the Service daily Logbook that is approved by the Site Manager and Project Manager based on the services provided by the Custodial Team. In addition to logging the Service Log Book, they perform the Quality Assurance Check based on the services provided by the Custodial Team.

The Site Supervisors & Team Lead is responsible for the direct supervision of the custodian and is active in completing all the cleaning tasks.

At the end of the shift and upon completion of the daily Scope of Work the Team Lead is responsible for ensuring that all lights are turned off, doors are closed & locked and the alarms are set prior to leave the facility.

- Comply with the security requirements of the Agreement.
- Responsible for the office building keys from the time of possession through the end of this Agreement term. Should we lose possession of the building keys for any duration of time during this period, we understand we will be assessed the costs for rekeying the building and making copies of the new keys.
- employee, and only in areas designated as break or lunchrooms.
- Solicit new business while performing work under this contract;
- Conduct business other than that which is covered by this contract during periods paid by the Government;
- Conduct business not directly related to this contract on Government premises;
- Use computers systems and/or other Government facilities for company or personal business and will not be disturbed in any manner;
- Disrupt official Government business;
- Will not disturb papers on desks, open desk drawers or file cabinets, using telephones, or other office equipment.

6. **VENDOR QUESTIONNAIRE**

6.1. Have you read and agreed to all Terms and Conditions?*

Yes

No

*Response required

6.2. Submit Proposal Document Here*

PDF Attachment

*Response required



Valley Sanitary District

DATE: October 10, 2023

TO: Board of Directors

FROM: Ron Buchwald, District Engineer

SUBJECT: AUTHORIZE THE GENERAL MANAGER TO EXECUTE AMENDMENT #1 TO A PROFESSIONAL SERVICES AGREEMENT WITH SOFFA FOR THIRD PARTY REVIEW OF SCADA AND PLC PLANS AS PROVIDED BY THE SCHNEIDER ELECTRIC TEAM FOR THE RECYCLED WATER PROJECT - PHASE 1

Suggested Action

Approve

Strategic Plan Compliance

GOAL 3: Excellent Facilities

Fiscal Impact

The addendum is for a not to exceed amount of \$40,000.00 and will be paid for from the Capital Improvement budget for the Recycled Water Project - Phase 1 and reimbursed by the Bank of America Loan.

Environmental Review

This item will be included as part of the overall Recycled Water Project that has already been through the California Environmental Quality Act process.

Background

Capital Improvement Projects (CIP) require a significant number of resources to be successful. Those resources include both internal staff and external contractors and consultants. One of the major components to any CIP project is the Supervisory Control and Data Acquisition (SCADA) system. The SCADA system allows for remote monitoring and control of our treatment equipment to ensure proper and continued operations. In order to ensure that the proposed upgrades include the appropriate components to integrate the new system with our existing system, the services of a third-party expert are needed. The District currently has a SCADA firm providing these technical services and staff has asked Soffa (formerly Trimax) to provide a quote for the as-needed plan check and inspection needs. Trimax (now Soffa) has been the primary consultant for our SCADA system for the

past several years and is responsible for most of VSD's SCADA system upgrades over those same years.

Recommendation

Staff recommends that the Board of Directors authorize the General Manager to execute this amendment #1 to the Professionals Services Contract with Soffa for a not to exceed amount of \$40,000.00.

Attachments

[Soffa Proposal E-2841Q01.1 for third party review.pdf](#)



Consultant Services

NOTICE

This document contains information that is confidential and proprietary property of SOFFA ELECTRIC, INC and has been provided for the sole purpose of evaluation. Recipient agrees that this document may not be copied, published, disclosed or used for any other purpose without the express written consent of SOFFA ELECTRIC, INC.

SOFFA ELECTRIC
www soffaelectric.com

To: Bidding Contractor
 Attention: Estimator
 Project Name: **Consultant Services**

Date: 10/03/2023
 Estimate No.: **E-2841Q01.1**

Thank you for this valued business opportunity. SOFFA ELECTRIC, INC. (SOFFA), MBE/WBE, UL508A/UL698A Certified System Integrator is pleased to propose the following scope of work for the project referenced above. The scope of work provided below is based on the following specifications and drawings:

- **Specification Sections:**
 - Enterprise Automation – RFI Control System

Scope of Work

A. Consultant Services		
Item	QTY	Description
1	LS	Work Includes: <ul style="list-style-type: none"> Verification of the PLC/SCADA software development to accomplish Valley Sanitary Districts requirements. Review IO list of Tags that will be displayed and controlled from the PLC and SCADA. Identify the alarms, reports, screens, graphical animation, and any other SCADA related functions. Provide electrical and programming assistance for the City’s control panels and equipment. Provide PLC and SCADA support, diagnostic, verification, and solutions per Valley Sanitary District Standards. Attend weekly design meetings with Schneider Electric, Valley Sanitary District, and Enterprise Automation.

B. Cost Summary	
	Grand Total: \$40,000.00

E. Exceptions/Clarifications

- a. Note this price is set for one year, starting on Valley Sanitary District NTB (Notice to Proceed).
- b. MSB, MCC, VFD's, FSCP, UPS System, 480V Electric Power Service, Switchboard, Load center, Power Monitoring, Junction boxes, vaults, trenching, demolitions, pipe spools, pneumatic tubing, connectors and fittings, any conduit, wire, any cables and any electrical hardware and supports, unless otherwise noted.
- c. Any pre-packaged instruments (VCP), Purging, Piping, system and its control hardware other than listed above.
- d. Factory calibration of instruments will take precedence over field calibrations.
- e. Provision/Installation of any Fiber Optic Systems, Demolition, Mechanical Devices, Concrete Pads, Pipes, Motor Operation Valves, Solenoid Valves, Butterfly type Flow Control Valves, Current-to-Pressure Transducers, Limit Switches, Temperature Switches and its control hardware, Sunshields, stanchions, valves, mounting items not included unless noted above.
- f. Unless otherwise noted above by the Scope of Work, quote is to furnish only and does not include installation labor, termination, construction work, site improvements, trade labor, contractor services and/or startup and testing services.
- g. Flow Meter Spools Excluded.
- h. SOFFA will only be responsible for calibrating SOFFA provided instrumentation and will not be held responsible for instrument calibrations for instrumentation provided by others.
- i. Instrumentation will be provided loose if not installed in an SOFFA provided panel.
- j. Electrical Power Studies, Seismic Calculation, NETA Testing and Insulation Testing not included unless noted above.
- k. SOFFA is not responsible for verifying the accuracy of instrument installation, sizing type, proper electric circuits, correct number of control wires with their conduits.
- l. Existing instrument calibrations are not included.
- m. I&C Submittals to be provided **approximately 8-10 weeks** after receipt of purchase order or written notice of intent.
- n. I&C Delivery to be scheduled **approximately 14-16 weeks** minimum after submittal approval and written notice of release.
- o. If bonding required please add **1.189%** to the total purchase amount.
- p. Unless otherwise notes, radio equipment, antennas, and Antenna Tower are excluded.

For any questions related to this proposal, please email Sales@SOFFAELECTRIC.com.

Sincerely,

Salib Mansour, PE

Vice President

Email: Salib.Mansour@SOFFAELECTRIC.com

GENERAL TERMS & CONDITIONS

- Work.** SOFFA Electric Inc. shall execute and provide all labor, supervision, materials, and apparatus required to pursue and complete the Work described above. SOFFA shall perform the work in a professional and competent manner. Unless otherwise specified, work must be completed during normal business hours (Monday through Friday, 7 a.m. to 4 p.m.) and pricing does not include overtime, shift, or off-hours work. Work performed outside of normal business hours is compensated at overtime rates. This includes any time worked in excess of 8 hours but less than 12 hours during the week, and the first 8 hours worked on Saturday. Work performed outside of normal business hours in excess of 12 hours, in excess of 8 hours on Saturday, and on Sundays and holidays are compensated at double time rates.
- Non-Solicitation.** To the fullest extent permitted by law, during the term of the Project and for a period of 18 months thereafter, both parties agree not to, directly or indirectly, solicit, recruit or employ any employee of either party without the prior written consent of the other.
- Progress Payments.** Prior to each Monthly Billing date, SOFFA is required to provide Owner/Contractor with a progress payment application that outlines the value of the Work installed, also known as "Completed Work." Within 30 days of receiving this application, Owner/Contractor must make a progress payment to SOFFA that is equivalent to the value of the Completed Work as of the corresponding Monthly Billing date. When required, Retention of 5% will be billed at the point of substantial completion of SOFFA's portion of the work.
- Final Payment.** A final payment, consisting of the unpaid balance of the Price, shall be made within 30 days after the last of the following to occur: (a) completion of the Work by the SOFFA, (b) furnishing of evidence satisfactory to Owner / Contractor that there are no claims, obligations, liens outstanding or unsatisfied for labor, services, materials, equipment, taxes or other items performed, furnished or incurred in connection with the Work, (c) delivery general release, in a form satisfactory to the Owner / Contractor, executed by SOFFA in favor of Owner / Contractor and Owner.
- Payment Terms.** Interest and late charges shall accrue at 1.5% per month on any unpaid balances.
- Change Orders.** Owner / Contractor may from time to time, by written order ("Change Order") to SOFFA, make changes in the Work. SOFFA shall thereby perform the changed Work in accordance with the terms of the Change Order. The Contract Price shall be adjusted by the net amount of any direct savings or direct cost attributable to the Change Order.
- Storage of Materials on Site.** Materials stored on site or in third party storage to be installed by others are considered delivered to the site owner's care and custody.
- Proposal.** This proposal and pricing are good for 30 days from the date of this proposal unless specified otherwise above. The proposal shall be incorporated into any contract or purchase order issued, whether or not this is expressly stated. Before beginning the task outlined here, the proposal must be accepted. Acceptance of this proposal is indicated by a notice to proceed or purchase order. Total price does not include applicable sales tax, tariffs, or shipping charges, unless otherwise noted. Lead times listed are estimates only. Fieldwork not included in the quotation will be subject to the rates and terms specified on the SOFFA Service Rate Schedule. Any exceptions must be stated and accepted in writing. Standby time is defined as the time during which the technician is available to work but is not working due to circumstances outside of the control of SOFFA, including weather conditions or by Client direction. Standby time will be billed at rates specified on the SOFFA Service Rate Schedule (including overtime if work is required outside normal business hours or the Field Technician's daily work hours).
- Documents.** The proposal is based on the documents listed. We cannot agree to be bound by the terms of any document not furnished to us prior to bid. Costs associated with documents that are not listed or not provided prior to the date above are not included in the price above.
- Limits of Liability.** In no event, regardless of cause, shall SOFFA assume responsibility for or be liable (a) under any penalty clause of for penalties of any description, (b) for indemnification of client or others for costs, damages, or expenses arising out of or related to the goods or services provided under the contract or for certification unless otherwise specifically provided herein, or (c) for any loss of profits, loss of use, business interruption, loss of data, or indirect, incidental, special, or consequential damages of any kind in connection with or arising out of the furnishing, performance, or use of the goods or services provided to client, including related documentation, or arising from delay in delivery or furnishing of any services or products, whether alleged as a breach of contract, or tortious conduct, including negligence, or otherwise, even if SOFFA has been advised of the possibility of such damages. Furthermore, SOFFA's liability arising out of or related to the contract, including for direct damages, shall not exceed the purchase price stated in the attached proposal. This limitation of liability is cumulative, with all payments for claims or damages in connection with the contract being aggregated to determine satisfaction of the limit, such that the existence of one or

more claims will not enlarge the limit. In addition, this limitation of liability will apply regardless of the form of action, whether in contract or tort, including negligence.

11. **Liquidated Damages.** SOFFA shall not be responsible for any failure to perform, or delay in performance of, its obligations resulting from acts of God, failure of its suppliers to ship or deliver on time, or other circumstances beyond SOFFA's reasonable control, including, but not limited to, sourcing, shipment or delivery issues caused by, related to, or resulting from COVID-19 or other similar national or global health situations. Under no circumstances is SOFFA liable for any penalties related to or identified as liquidated damages for failure to meet a delivery schedule regardless of the cause.
12. **Material Pricing /Delivery Delays.** If, during the performance of this contract, material pricing significantly increases, through no fault of SOFFA, the proposal price shall be equitably adjusted by an amount reasonably necessary to cover any such significant price increases. As used herein, a significant price increase shall mean any increase in price exceeding 3% as experienced by SOFFA from the date of the contract signing. Such price increases shall be documented through quotes, invoices, or receipts.

Where the delivery of material is delayed, through no fault of subcontractor, due to shortages or unavailability of materials, SOFFA shall not be liable for any additional costs or damages associated with such delay(s).

The parties understand and agree that (i) there are current issues with the manufacture and supply of various materials and equipment (all, collectively, "Goods"), which issues generally are referred to as "supply chain disruption" ("Disruption"), (ii) the Disruption arises from a variety of global, national, and local factors, all of which are beyond the control of SOFFA Systems, and (iii) the Disruption has impacted suppliers ability to provide goods by certain dates, in the quantities ordered, and/or for the specified price.

13. **Accelerated/ Decelerated /Termination of Project Execution**

FAST TRACK:

Client acknowledges that if Client requires a Systems Integrator (as defined below) to perform on an accelerated schedule (i.e. pace faster than the Systems Integrator's normal business procedure as dictated by the Systems Integrator's standard business practices), the risk of errors in the design and development of hardware and software increases as do certain costs such as but not limited to, express shipping of incoming purchases to the Systems Integrator, charges for expedited manufacture, development and/or delivery of hardware and/or software to the Systems Integrator and, express shipping to Client by the Systems Integrator. Client agrees that upon Client's request to the Systems Integrator to perform on an accelerated basis, Client will compensate the Systems Integrator (at Systems Integrator's then prevailing rates) for the additional costs incurred and work required as a result of the accelerated pace of project execution.

SLOW TRACK:

A decelerated pace of project execution also causes additional work and costs. If Client decelerates the pace of project execution, Client shall bear the additional costs and expenses associated with such deceleration including but not limited to paying the Systems Integrator for "spin-up" time (inefficiency caused by starting and stopping) at the System Integrator's then prevailing rates. As used herein, "System Integrator" refers to any person or entity responsible for integrating software, hardware or other materials or equipment provided by SOFFA into Client's computer network or other system(s).

TERMINATION:

Cancellations or stop-work requests by Client on any order or part thereof, must be made in writing. Notwithstanding any such request, Client agrees to pay SOFFA's standard contract labor rate for all labor incurred, and SOFFA's net material costs for all materials purchased for that order, including any restocking charges incurred.

If Client fails to comply with its obligations hereunder (including without limitation the full and timely payment to SOFFA), SOFFA

may provide written notice of such default to Client and suspend further performance until such default is cured by Client. When such default is cured by Client, the amount to be paid for the Project will be equitably increased to account for SOFFA's damages arising from such suspension (including without limitation demobilization and remobilization expenses and increased costs of performance) and the time for SOFFA to complete the Project will be equitably extended to account for such suspension. If Client fails to cure such default within 30 days of its receipt of such notice from SOFFA, SOFFA may terminate its agreement with Client by providing written notice thereof and recover from Client payment for all portions of the Project performed (in whole or in part) through the date of such termination, SOFFA's demobilization expenses and other reasonable termination costs, the amount of expected overhead and profit SOFFA would have earned

on the cancelled portions of the Project if not for Client's default, and any collection costs incurred by SOFFA in obtaining payment due from Client.

14. **Warranty.** SOFFA warrants all equipment manufactured by SOFFA to be free from defects in material and workmanship under normal use and service for a period of twelve (12) months OR as defined in the contract from date of shipment. All parts or products not manufactured by SOFFA will be covered only by the express warranty, if any, of the manufacturer. SOFFA's above-described limited warranty does not extend to damage or wear caused by misuse, negligence, accident, corrosion, modification by Client, faulty installation, loss of product, or tampering in a manner to impair normal operation of the equipment. SOFFA reserves the ultimate right to determine implicitly or explicitly what is or is not covered by warranty.
15. **Ownership of Software.** Title to the application software provided to Client by SOFFA under the Contract remains with SOFFA, and Client is subject to any third-party licenses. SOFFA grants to the Client a personal, paid-up, perpetual, nonexclusive, non-assignable and non-transferable license, without right of sub-license, to use said application software in the application for which the software was designed in conjunction with the specified equipment. Security / Password Maintenance becomes the sole responsibility of the Client upon acceptance of Certificate of Proper Operation (COPO).
16. **Intellectual Property.** SOFFA shall retain all rights, title and interest in all Intellectual Property (as defined herein) used, made or arising in connection with the Contract or otherwise provided or communicated to Client by or on behalf of SOFFA. Without limiting the foregoing, Client shall not use any drawings or specifications prepared by SOFFA, except for the purpose of confirming the quality of design and manufacturing of the products set forth in the attached proposal; and Client shall not photocopy, duplicate or in any way reproduce in whole or in part any drawings, specifications, or software which may be supplied by SOFFA; provided, however, that the Client may make copies of and use such software for Client's internal purposes only, and not for rendering services or selling products to third persons. The Client shall not sell, license, sublicense, assign or otherwise transfer the Intellectual Property or any interest therein to anyone. As used herein, "Intellectual Property" means and includes any and all software, specifications, designs, processes, techniques, concepts, improvements, discoveries, ideas, and inventions, whether or not patentable, and all patents, copyrights, trade secrets and other intellectual property rights therein or related thereto.
17. **Returns.** All products and services described herein are sufficiently unique to prohibit any return for full or partial credit, other than under a warranty, unless specifically stated otherwise in the attached proposal. SOFFA is not responsible for loss of or damage to products returned to it, unless notified in advance of the return and the Purchaser is given a Return Authorization Number which is prominently placed upon the shipping documents and packing container.
18. **Dispute Resolution / Governing Law / Attorney Fees.** It is agreed that any dispute arising under the Contract, including without limitation disputes relating to interpretation of the Contract terms or the performance, negligent performance or non-performance of the Contract or any part thereof, will be determined by submission to binding arbitration in accordance with the California Arbitration Act (California Code of Civil Procedure ["CCP"] sections 1280 – 1294.2) or any successor statute then in effect. Any such arbitration shall be held and conducted in Los Angeles, California, before one (1) neutral arbitrator who shall be selected by mutual agreement of the parties; provided, however, if agreement is not reached on the selection of an arbitrator within fifteen (15) days of a party's written demand for arbitration, then such arbitrator shall be appointed by the presiding judge of the Superior Court of California County of Los Angeles in accordance with CCP section 1281.6. The discovery provisions of CCP section 1283.05 shall apply in the arbitration proceedings. The arbitrator's decision shall be based on California law. The arbitrator's decision may include monetary and/or equitable relief. The cost and fees of the arbitrator shall be borne by the non-prevailing party. In addition, the prevailing party shall be awarded reasonable attorney fees, witness costs and expenses, and other costs and expenses incurred in connection with the arbitration. **ALL PARTIES TO THE CONTRACT, BY ENTERING INTO IT, ARE GIVING UP THEIR CONSTITUTIONAL RIGHT TO HAVE ANY SUCH DISPUTE DECIDED IN A COURT OF LAW BEFORE A JURY, AND INSTEAD ARE ACCEPTING THE USE OF ARBITRATION AS THEIR EXCLUSIVE REMEDY.**

If any proceeding or lawsuit is brought by either party hereto against the other relating to any dispute arising out of or relating to the Contract or the subject matter thereof, the prevailing party in such proceeding or lawsuit shall be entitled to receive, in addition to any other relief that may be awarded, its costs of suit, expert witness fees and reasonable attorneys' fees of outside counsel, including costs and fees on any appeal.

19. **Insurance.**

SOFFA carries the following insurance.

Workmen's Compensation	\$1,000,000 (state-required level)
General Liability Each Occurrence	\$1,000,000
Personal & Adv injury	\$1,000,000
Products Aggregate	\$1,000,000
General Aggregate	\$2,000,000
Automobile	\$1,000,000
Excess Liability	\$4,000,000
Professional Liability Each Occurrence	\$1,000,000
Aggregate	\$3,000,000

20. **Entire Agreement/Assignment.** The Contract, including any related purchase order or change order subsequently accepted by SOFFA in writing, completely and exclusively state the agreement of the parties regarding its subject matter. The Contract supersedes, and its terms govern, all prior proposals, agreements or other communications between the parties, oral or written, regarding such subject matter. Subsequent modifications of the Contract shall be in writing and signed by both parties. The Contract shall not be assigned by either party without prior written approval of the other part.

Purpose

EA is requesting more detailed control system information which will be used during the detailed design/programming phase of the project. We realize some of this may not exist.

EA would like to review all the available documentation and the meet with the client and their control system representatives to discuss expectations throughout the project.

OT/Networking

1. Has VSD's control system representative reviewed the Network Block Diagram provided within the AFC Drawing package?
 - a) Are there any comments that EA should be aware of?
2. Are there any existing detailed networking diagrams/drawings of existing equipment in the facility related to the SCADA system and PLCs?
 - a) Definition of what networks/subnets exist?
 - b) Special considerations or pertinent information regarding design?
3. Device/IP address list for devices on the SCADA/PLC networks.
 - a) As an option, EA can provide a list of devices that will require IP addresses for this project for the District to assign.

SCADA

1. SCADA Software and version
2. SCADA documentation showing architecture of software and hardware
3. What licensing has the client purchased for the SCADA software?
4. SCADA configuration backups of all files
5. Documentation for SCADA development or standard graphics/files/etc. that may be required to facilitate development

PLC

1. Is there a plant I/O list (spreadsheet format) that documents all of the control signals in the facility from each PLC?

2. Is there a consolidated list of plant PLCs that shows HW model and SW version?
 - a) Is there a preferred version of software for PLC programming?
3. Are there PLC/SCADA tagging standards for creating PLC tags and descriptions?
4. Are there any standards documented for EA to use during programming?
 - a) E.g. Style guide or standard user-defined functions?
5. Request the latest backups for plant PLCs:
 - a) Specifically the following PLCs: Headworks PLC, Digester PLC, existing Hot Water Boiler PLC, existing Flare PLC, existing Grit PLC (we believe this includes existing Ferric Chloride logic).
 - b) Any other program that may have similar standard equipment or standard programming practices that the District would like to have followed

Photos

1. If available, EA would like to request of control panels (overview + detail/close-up photos). The District does not need to get pictures if they don't already exist, the project team can go get these on-site if needed.
 - a) Headworks PLC control Panel
 - b) Digester PLC panel
 - c) Existing Ferric Chloride panel (LCP-300)



Valley Sanitary District

DATE: October 10, 2023
TO: Board of Directors
FROM: Jason Dafforn, General Manager
SUBJECT: **AUTHORIZE SPECIFIC DIRECTORS TO ATTEND THE CSDA SPECIAL DISTRICT LEADERSHIP ACADEMY IN SONOMA, CALIFORNIA, AND REIMBURSE RELATED EXPENSES AND CANCEL THE BOARD MEETING OF OCTOBER 24, 2023**

Suggested Action

Approve

Strategic Plan Compliance

GOAL 6: Improve Planning, Administration and Governance

Fiscal Impact

The estimated cost for attending this event is approximately \$3,400 per director, which includes travel and related expenses and 4 days of service.

Environmental Review

This item does not qualify as a project as defined by the California Environmental Quality Act (CEQA).

Background

CSDA's Special District Leadership Academy (SDLA) groundbreaking, curriculum-based continuing education program, recognizes the necessity for the board and general manager to work closely toward a common goal. SDLA provides the knowledge base to perform essential governance responsibilities and is designed for both new and experienced special district board members. If the Board approves the Directors to attend the Conference, the Regular Board Meeting scheduled for October 24, 2023, will need to be canceled for lack of quorum.

Recommendation

Staff recommends that the Board of Directors discuss and authorize President Debra Canero, Secretary/Treasurer Scott Sear and Director Jacky Barnum to attend the CSDA Special District Leadership Academy on October 22-25, 2023, in Sonoma, California, and the reimbursement of related expenses, and cancel the Board Meeting for October 24, 2023.

Attachments

[2023_SDLA-Conference-Brochure_Web.pdf](#)

ACHIEVING DISTRICT GOALS... TOGETHER.



Two Conferences for Training Throughout the State

February 26 – March 1, 2023 – La Quinta (Palm Springs Area)

OR

October 22 – 25, 2023 – Sonoma County (Santa Rosa)



CSDA's 2023
**Special District
Leadership Academy Conference**

A Comprehensive Governance Leadership Conference for Elected and Appointed Directors/Trustees



BOARD & STAFF LEARN TO WORK AS A TEAM.

Participate in the **Special District Leadership Academy Conference** and complete all four modules of the Academy during the course of two and a half days.

This conference content is based on CSDA's Special District Leadership Academy (SDLA) groundbreaking, curriculum-based continuing education program, which recognizes the necessity for the board and general manager to work closely toward a common goal. SDLA provides the knowledge base to perform essential governance responsibilities and is designed for both new and experienced special district board members.

“This conference was very informative and presented well. Each presenter was very knowledgeable on the subject matter. I feel this training should be mandatory for all special district board members and GM’s.”

Scott Frick,
Scott Valley Fire Protection District

SDLF SPECIAL DISTRICT LEADERSHIP FOUNDATION

CERTIFICATE IN SPECIAL DISTRICT GOVERNANCE

BOARD MEMBERS AND TRUSTEES

SHOW YOUR COMMITMENT AND DEDICATION TO SERVING YOUR COMMUNITY.

The **Certificate in Special District Governance** was designed to acknowledge special district Board Members and Trustees who have taken extra steps to become better educated in core areas of governance.

Complete the Special District Leadership Academy + 10 additional professional development hours and receive this recognition.

1112 I Street, Suite 200, Sacramento, CA 95814 • t: 916.231.2909 • www.sdlf.org



Two Locations • Two Options

ATTEND CSDA'S SPECIAL DISTRICT LEADERSHIP ACADEMY CONFERENCE



Local boards are the reason why local control is local. Special district boards are the voices of the community, and they are also a large reason why special districts exist.

The truth is that every elected or appointed public official needs to worry about governance; governance is what boards do. It's what they bring to the table.

Governance is taking the wishes, needs, and desires of the community and transforming them into policies that govern the district.

Whether you're new to the board, or someone who has served for many years, this conference provides essential tools and information to effectively govern your district!

Attendees will learn:

- Teamwork: The roles of the board and staff in your district.
- Attributes and characteristics of highly effective boards.
- How culture, norms, values, and operating styles influence the district.
- Specific jobs the board must perform.
- How individual values, skills, and knowledge help to shape how effective boards operate.
- The importance of moving from "I" to "we" as the governance team.
- The board's role in setting direction for the district.
- The board's role in finance and fiscal accountability.
- And much more!



SDRMA Credit Incentive Points

Special District Risk Management Authority (SDRMA) is committed to establishing a strategic partnership with our members to provide maximum protection, help control losses, and positively impact the overall cost of property/liability and workers' compensation coverage through the Credit Incentive Program. Credit incentive points can be earned based on an agency's attendance at the Special District Leadership Academy Conference, reducing SDRMA member's annual contribution amount.



February 26 – March 1, 2023
Embassy Suites La Quinta Hotel & Spa
50-777 Santa Rosa Plaza
La Quinta, CA 92253

HOTEL ROOM RESERVATIONS

Room reservations are available at the CSDA rate of \$180 plus tax, single or double occupancy. You will receive a link to make your hotel reservation AFTER you have registered for the conference. The room reservation cut-off is January 25, 2023; however, space is limited and may sell out before this date.

CSDA rate includes complimentary full, cooked to order breakfast buffet, complimentary Nightly Managers Reception, complimentary self-parking, and complimentary guest room Wi-Fi.



EARLY BIRD DISCOUNT

The early bird discount for this location requires registration on or before Tuesday, January 25, 2023.

Cancellations must be in writing and received by CSDA no later than January 25, 2023 at 5:00 p.m. All cancellations received by this date will be refunded less a \$75 cancellation fee. There will be no refunds for cancellations made after January 25, 2023. Substitutions are acceptable and must be done in writing no later than February 17, 2023 at 5:00 p.m. Please submit any cancellation notice or substitution requests to meganh@cgsda.net or fax to 916-520-2465.



October 22 – 25, 2023
Hyatt Regency Sonoma Wine Country
170 Railroad Street
Santa Rosa, CA 95401

HOTEL ROOM RESERVATIONS

Room reservations are available at the rate of \$157* plus tax, single or double occupancy plus \$25/night per room discounted destination fee. You will receive a link to make your hotel reservation AFTER you have registered for the conference. The room reservation cut-off is September 22, 2023; however, space is limited and may sell out before this date.

CSDA rate and discounted destination fee includes glass of wine upon check-in, unlimited personal Wi-Fi access, exclusive winery offers from winery partners, electric vehicle charging stations, daily in-room water, and daily wine tasting in lobby.

**Rate at this location will be the current per-diem rate; \$157 as of 11/22 but subject to change.*



EARLY BIRD DISCOUNT

The early bird discount for this location requires registration on or before Thursday, September 22, 2023.

Cancellations must be in writing and received by CSDA no later than September 22, 2023, at 5:00 p.m. All cancellations received by this date will be refunded less a \$75 cancellation fee. There will be no refunds for cancellations made after September 22, 2023. Substitutions are acceptable and must be done in writing no later than October 13, 2023, at 5:00 p.m. Please submit any cancellation notice or substitution requests to meganh@cgsda.net or fax to 916-520-2465.

FIRST-TIME ATTENDEE

SCHEDULE OF EVENTS



SUNDAY

5:30 – 7:00 p.m.

REGISTRATION AND NETWORKING RECEPTION

Take a moment to network with your peers from throughout the state at this informal networking reception. Reception includes light appetizers.

TUESDAY

8:30 – 10:00 a.m.

FULFILLING YOUR DISTRICT'S MISSION: CHARTING THE COURSE

** This session covers Module 2 of the Special District Leadership Academy: Setting Direction/Community Leadership*

This conference session will highlight the importance of setting the direction for your district. Learn the critical components of direction setting for your district along with how to avoid planning pitfalls. Attendees will walk through the steps of establishing and fulfilling your district's mission, vision, values, strategic goals, and how to communicate those objectives to your constituents.

10:00 – 10:30 a.m.

BREAK (All Attendees)

10:30 – 12:00 p.m.

FULFILLING YOUR DISTRICT'S MISSION: CHARTING THE COURSE (continued)

12:00 – 1:00 p.m.

LUNCH PROVIDED (All Attendees)

1:15 – 2:45 p.m.

GET THE WORD OUT! BEST PRACTICES FOR COMMUNICATION AND OUTREACH

** This session covers Module 2 of the Special District Leadership Academy: Setting Direction/Community Leadership.*

This conference session looks at common communication breakdowns and potential areas for improvement in public agency communications. It will discuss proper and effective communication methods to be aware of as a governing official including:

- Identifying audiences.
- Responding to public input.
- Media relations.
- Legislative outreach and advocacy.

MONDAY

8:30 – 10:00 a.m.

BUILDING A FOUNDATION FOR GOOD GOVERNANCE

** This session covers Module 1 of the Special District Leadership Academy: Governance Foundations.*

In this conference session, the instructor will lay the groundwork for good governance in your district.

Attendees will discover:

- Why good governance is so important to the overall well-being of the district.
- The traits of effective board members.
- What good governance means and how to effectively put it into practice.
- How to move your board from "I" to "we," including how to become an effective team, establish team standards, and essential conditions for team building.

10:00 – 10:30 a.m.

BREAK (All Attendees)

10:30 a.m. – 12:30 p.m.

BUILDING A FOUNDATION FOR GOOD GOVERNANCE (continued)

12:30 – 1:30 p.m.

LUNCH PROVIDED (All Attendees)

1:45 – 3:00 p.m.

DEFINING BOARD/STAFF ROLES AND RELATIONSHIPS

** This session covers Module 4 of the Special District Leadership Academy: Board's Role in Human Resources.*

This conference session will teach participants how to determine the human resource (HR) health of their district and what areas to focus on as a board and individual governing official including:

- Identifying the board's role in human resources.
- Recognizing HR red flags and positive indicators.
- Developing and maintaining essential HR policies.
- Covering confidentiality and legal liabilities.
- Evaluating the general manager.

3:00 – 3:30 p.m.

BREAK (All Attendees)

3:30 – 4:30 p.m.

DEFINING BOARD/STAFF ROLES AND RELATIONSHIPS (continued)

5:30 – 7:00 p.m.

SIP AND SAVOR EVENING RECEPTION

Sponsored by the Special District Risk Management Authority (SDRMA)

Join us for a lively evening of networking and refreshments.



2:45 – 3:00 p.m.

BREAK (All Attendees)

3:00 – 4:00 p.m.

GET THE WORD OUT! BEST PRACTICES FOR COMMUNICATION AND OUTREACH

(continued)

OPEN EVENING

● WEDNESDAY

8:30 – 10:00 a.m.

SHOW ME THE MONEY! WHAT DO BOARD MEMBERS NEED TO KNOW ABOUT DISTRICT FINANCES?

** This session covers Module 3 of the Special District Leadership Academy: Board's Role in Finance and Fiscal Accountability.*

This conference session will provide a review and insight of important financial concepts, reports, and policies specific to public agencies including special districts.

Attendees will learn:

- How to ask the right questions.
- How to link the finance process to the district mission and goals.
- Budget process, budget assessment, and communicating budget information to the public.
- How to develop and analyze capital improvement plans and reserve guidelines.

10:00 – 10:15 a.m.

BREAK (All Attendees)

10:15 a.m. – 12:00 p.m.

SHOW ME THE MONEY! WHAT DO BOARD MEMBERS NEED TO KNOW ABOUT DISTRICT FINANCES? (continued)

12:00 p.m.

GRADUATION CERTIFICATE DISTRIBUTION

First-time attendees must attend all sessions and turn in their completed certificate application in order to receive their certificate at the conclusion of the conference.

“I found the programming relevant and timely as a newly elected board member. I liked that staff attended to give different perspectives. The presenters were leaders in their field, very knowledgeable and generous with their time for further discussion.”

Heidi Doyle,

North Tahoe Fire Protection District

Tuesday 4 p.m.

CSDA BENEFITS

BINGO

GAMES FUN WITH PRIZES

We love maximizing the benefits we offer. You love winning prizes! We start with an exploration of membership benefits to make sure your district is taking full advantage of all we provide. Along the way, you'll win prizes!

REASONS TO ATTEND:

- We mentioned prizes, right?
- Learn how to navigate our website & community portal so you can quickly access resources
- Explore CSDA value-added benefits that may save your district money!
- BINGO is for everyone! Members & non-members all benefit
- Meet new peers! This activity has a way of bringing people



SDLA Graduate? Join us for our Returning Attendee Track with Two Days of Breakout Sessions with topics such as:

- **HOW TO LEAD YOUR BOARD MEETINGS AWAY FROM CHAOS**
- **INTRODUCTION TO LABOR RELATIONS**
- **FINANCING AND FINANCIAL MANAGEMENT**
- **BROWN ACT UPDATES**
- **STRATEGIC PLANNING**

Check the SDLA Website for Returning Attendee Track Session details when agenda is confirmed.

RETURNING ATTENDEE
SCHEDULE OF EVENTS



● **SUNDAY**

5:30 – 7:00 p.m.
REGISTRATION AND NETWORKING RECEPTION
Take a moment to network with your peers from throughout the state at this informal networking reception. Reception includes light appetizers.

● **MONDAY**

8:30 a.m. – 12:30 p.m.
BREAKOUT SESSIONS

10:00 – 10:30 a.m.
BREAK *(All Attendees)*

12:30 – 1:30 p.m.
LUNCH PROVIDED *(All Attendees)*

1:45 – 4:30 p.m.
BREAKOUT SESSIONS

3:00 – 3:30 p.m.
BREAK *(All Attendees)*

5:30 – 7:00 p.m.
SIP AND SAVOR EVENING RECEPTION



Sponsored by the Special District Risk Management Authority (SDRMA)
Join us for an entertaining evening of networking and refreshments.

● **TUESDAY**

8:30 a.m. – 12:00 p.m.
BREAKOUT SESSIONS

10:00 – 10:30 a.m.
BREAK *(All Attendees)*

12:00 – 1:00 p.m.
LUNCH PROVIDED *(All Attendees)*

1:15 – 4:00 p.m.
BREAKOUT SESSIONS

2:45 – 3:00 p.m.
BREAK *(All Attendees)*

4:00 p.m.
CONFERENCE ENDS FOR RETURNING ATTENDEES

“It was a great conference fully loaded with valuable information, resources, tools and materials to review and share.”

*Crystal Harding,
North Highlands Recreation and Park District*

“It was interesting and informative. The presentations gave me a foundation of my ‘job’ as a representative of my community. There are questions I need to ask staff and there are suggestions I need to make to my fellow board members based on the information provided. SDLA is a valuable resource for our Community Services District.”

*De Denten,
Gualala Community Services District*



2023 Registration Form

Special District Leadership Academy Conference

(Use one form per registrant)

Three Ways to Register

- **Register online** by visiting the SDLA Conference website at sdla.csda.net.
- **Fax number:** 916-520-2465. All faxed registration forms must include credit card payment.
- **Mail:** CSDA, 1112 I Street, Suite 200, Sacramento, CA 95814. Please include registration form and payment. Checks should be made payable to: California Special Districts Association.

Not sure if you are a member?

Contact the CSDA office at 877-924-2732 to find out if your agency or company is already a member. To learn more about the many benefits of CSDA membership, contact Member Services Director Cassandra Strawn at membership@csda.net or call toll-free at the number listed above.



Name/Title:		
<input type="checkbox"/> First-time Attendee <input type="checkbox"/> Returning Attendee		
District:		
Address:		
City:	State:	Zip:
Phone:		Fax:
<input type="checkbox"/> Member <input type="checkbox"/> Non-member		Email:
Emergency Contact - Name & Phone:		
WHICH CONFERENCE WILL YOU BE ATTENDING?		
<input type="checkbox"/> FEBRUARY 26 - MARCH 1, 2023 - LA QUINTA EARLY BIRD DISCOUNT: JANUARY 25, 2023 <input type="checkbox"/> CSDA Member \$625 <input type="checkbox"/> Non-member \$950 AFTER JANUARY 25 <input type="checkbox"/> CSDA Member \$675 <input type="checkbox"/> Non-member \$1,010	<input type="checkbox"/> OCTOBER 22 - 25, 2023 - SANTA ROSA EARLY BIRD DISCOUNT: SEPTEMBER 22, 2023 <input type="checkbox"/> CSDA Member \$625 <input type="checkbox"/> Non-member \$950 AFTER SEPTEMBER 22 <input type="checkbox"/> CSDA Member \$675 <input type="checkbox"/> Non-member \$1,010	
SEND MORE - SAVE MORE! -- SPECIAL DISCOUNTED PRICING!		
ADDITIONAL ATTENDEE FROM THE SAME DISTRICT BEFORE EARLY BIRD DISCOUNT <input type="checkbox"/> CSDA Member \$425 <input type="checkbox"/> Non-member \$650	ADDITIONAL ATTENDEE FROM THE SAME DISTRICT AFTER EARLY BIRD DISCOUNT <input type="checkbox"/> CSDA Member \$475 <input type="checkbox"/> Non-member \$715	
Payment		
<input type="checkbox"/> Check <input type="checkbox"/> Visa <input type="checkbox"/> MasterCard <input type="checkbox"/> Discover <input type="checkbox"/> American Express		
Acct. Name:		Acct. Number:
Expiration Date:	CVC:	Authorized Signature:
Special needs		
<input type="checkbox"/> Vegetarian <input type="checkbox"/> Other:		

Consent to Use Photographic Images: Registration and attendance at, or participation in, CSDA meeting and other activities constitutes an agreement by the registrant to CSDA's use and distribution (both now and in the future) of the registrant or attendee's image or voice in photographs, videotapes, electronic reproductions, and audiotapes of such events and activities.

Anti-Discrimination and Harassment Policy: CSDA is dedicated to a harassment-free event experience for everyone. Our Anti-Discrimination and Harassment Policy can be found under "CSDA Transparency" at www.csda.net/about-csda/who-we-are.



Steady as you go.

When your team and ours all pull together, you get the sure-footed stability you need to proceed with confidence. As an extension of your staff, we are always at the sidelines delivering service and expertise. For everything from Workers' Compensation and Property/Liability coverages to Health Benefits options available throughout California, we are here to keep you going strong. For more information, visit sdrma.org.





Valley Sanitary District

DATE: October 10, 2023
TO: Board of Directors
FROM: Jason Dafforn, General Manager
SUBJECT: RECEIVE MONTHLY GENERAL MANAGERS REPORT FOR SEPTEMBER 2023

Suggested Action

Review

Strategic Plan Compliance

GOAL 6: Improve Planning, Administration and Governance

Fiscal Impact

There is no fiscal impact from this report.

Environmental Review

This is not a project as defined by the California Environmental Quality Act (CEQA).

Background

The following data represents the activities and metrics for the month of September 2023.

Administrative Services

- Held one (1) Budget & Finance Committee meeting.
- Held one (1) Community Engagement Committee meeting.
- Held two (2) Board of Directors meetings.
- Commenced direct billing processes for the fiscal year 2022/2023.
- Continuation of year-end audit for the fiscal year ending June 30, 2023.
- Commenced research and preparation of the Annual Comprehensive Financial Report (ACFR) for the fiscal year 2022/23.
- Open enrollment for employee benefits Monday, September 18th through Monday, October 2nd, 2023.
- Completed budget book submissions for GFOA and CSMFO award consideration.

- Created outreach materials for the National Night Out event.
- Photographed the Evolution of Wastewater display at the Coachella Valley History Museum for CWEA award submission for Public Outreach Project of the Year.

Environmental Compliance Services

- 2023 DMRQA Study results submitted to EPA Region 9, Office of Compliance.
- Lab staff training Andrew Sorensen on Laboratory process control sample methods to serve as back-up to the Laboratory.
- Lab staff completed annual MDLs (Method Detection Limit) studies on 7 different laboratory methods.

Development Services

- Plans have been approved for a new aquatic center at the Polly Pool and a renovation of the South Jackson Park on the corner of Jackson Street and Date Avenue.
- Construction had begun on the new building for the Community Valley Bank on Hwy 111 and Granada Drive
- Construction has begun on Gabino's Creperie near the corner of Miles Avenue and Towne Street.
- Construction has begun on the Tower Market convenience store and gas station on the northwest corner of Dr. Carreon and Monroe Street.
- Construction has begun on the Indio Taphouse on the southwest corner of Miles Avenue and Towne Street.
- Gallery Homes is starting the development of 82 homes in the Indian Palms Country Club on the corner of Odium Drive and Barrymore Street.
- Construction has begun on the new OES Gym on the corner of Highway 111 and Jefferson Street

Collection Services

- No-Spill report for the month of September will be submitted to the California Integrated Water Quality System, as required in the Waste Discharge Requirements Monitoring and Reporting Program. Due by the end of the month.
- Monthly preventative maintenance service of lift stations is scheduled for the month.
- CCTV mainline inspection cameras are going to be shipped to CUES for routine maintenance service on the units. CUES currently has one of the units, waiting to receive that unit before shipping the next unit.
- CCTV inspections are currently being conducted in the area of Miles and Requa.
- Field Vector crew is currently working in the area of Miles and Requa.

Capital Improvement Program

- The Reclaimed Water Project - Phase 1 was awarded to Schneider Electric / Stantec in June 2020. This project will replace an aging and capacity restricting grit chamber and provide redundancy by adding a second digester and expanding the bar screens. This project will also include replacement of the Main Switch Control Panel and the addition of a sludge thickener unit. *Update: Walsh is currently working on building the new grit chamber and digester walls. Steel plate shoring is being installed in preparation of excavation for the rotary screw thickener*

facilities.

- The Westward Ho Drive Sewer Siphon Replacement Project is a FEMA funded project to replace the damaged sewer siphon from the February 2019 storm. Permitted plans have been signed by CVWD and have been approved by the City of Indio and La Quinta. CEQA documentation for this project has been completed. *Update: This project is currently being held up by FEMA. VSD needs FEMA approval before proceeding with bidding and construction which was expected by February 2023. The recent storm Hillary has exposed the sewer siphon once again. VSD worked with IWA on emergency repairs to protect the sewer siphon and IWA's directly adjacent 10-inch watermain.*
- The Downtown Indio Rehabilitation Project is currently under construction and covers the rehabilitation of existing sewer mains and manholes in a portion of the downtown area, the upsizing of two existing sewer mains between Grace and Salton Street, several point repairs, and the installation of new public sewer in the Indio Motor Machine property. The project was awarded to GRBCON Inc. *Update: The contractor has completed all the rehabilitation and the sewer upsizing. The contractor is currently working on finishing the remaining point repairs before moving on to the new public sewer.*
- The Calhoun Lift Station Improvement Project is currently in design and will address issues with the Calhoun Lift Station observed during the lift station evaluation project from last fiscal year. They will address the bubbling wet well lining, aging discharge piping, and deficient electrical equipment. *Update: VSD staff have returned comments on the 65% plans and are currently reviewing the specifications.*
- The Southeast Indio Sewer Improvement Project is currently in design and will include the rehabilitation of existing sewer mains and manholes in a portion of the downtown area and the realignment of a sewer main located in the backyards of residences between Marshall and Grace Street. *Update: VSD staff are currently reviewing the 65% plans.*

Recommendation

Staff recommends that the Board receive the General Manager's Report for activities during the month of September 2023.

Attachments

[Attachment A Admin Services Report.pdf](#)

[Attachment B NPDES Report for Oct.pdf](#)

[Attachment C Collection Services Report 2023.pdf](#)

[Attachment D Development Services Report September 2023.pdf](#)

[Attachment E Capital Improvement Program Report October 2023.pdf](#)

[Attachment F Environmental Compliance Summary.pdf](#)

[Attachment G Wastewater Surveillance Summary for Oct.pdf](#)

Administrative Services - Task Summary 2023

Task	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total To Date
Active Litigation Filed	-	-	-	-	-	-	-	-	-	-	-	-	-
Board Meeting	3	2	3	4	3	3	2	1	2				23
Budget/Finance Committee Meeting	1	-	-	-	1	-	-	-	1				3
Operations Committee Meeting	-	1	-	1	-	1	-	1	-				4
Community Engagement Committee Meeting	1	-	1	-	1	-	1	-	1				5
Employee Anniversaries	1	4	1	1	3	2	5	1	2				20
Employee Promotions	-	-	-	-	-	-	-	-	-				-
Facebook Postings	1	3	-	-	-	1	-	-	-				5
Insurance Claims Initiated	-	-	-	-	-	-	-	-	-				-
Lost Time Work Incidents	-	-	-	-	-	-	-	-	-				-
Media Coverage Items	-	-	-	1	-	-	-	-	-				1
New Hires	-	-	2	-	1	1	-	-	-				4
Press Release	-	-	-	1	-	1	-	-	-				2
Public Records Request	2	1	-	1	-	-	1	2	1				8
Resignations	-	-	1	-	-	-	-	-	-				1
Retirements	-	-	-	-	-	-	-	-	-				-

Aug 2023	Plant Influent		ASP Effluent		Pond Effluent			Total Plant Discharge (Outfall) Grab									
	CBOD (mg/L)	TSS (mg/L)	Monthly Average Flow (MGD)	CBOD (mg/L)	TSS (mg/L)	Monthly Average Pond Effluent Flow (MGD)	CBOD	TSS	EColi (MPN/100ml)	Oil and Grease (mg/L)	Copper (ug/L)	Di(2-ethylhexyl)phthalate (ug/L)	Cyanide (total) (ug/L)	Ammonia (total, as N) (mg/L)	Nitrate (as N) (mg/L)	Nitrite (as N) (mg/L)	Total Nitrogen (mg/L)
1																	
2																	
3	212	328		3.30	8.00				161	< 1.40	4.00	< 0.500	< 0.00430	0.480	9.80	< 0.00400	10.0
4																	
5																	
6																	
7									72.7								
8																	
9																	
10	220	310		4.60	9.00												
11																	
12																	
13																	
14									65.7								
15																	
16	212	302		3.60	9.60												
17																	
18																	
19																	
20																	
21																	
22																	
23																	
24	218	230		5.80	6.40				102								
25																	
26																	
27																	
28																	
29									31.3								
30	238	220	6.23	4.20	8.00	0.000											
31																	
Average	220	278	6.23	4.30	8.20	0.000			75.5*	1.40	4.00	0.500	0.00430	0.480	9.80	0.00400	10.0
Minimum	212	220	6.23	3.30	6.40	0.000			31.3	< 1.40	4.00	< 0.500	< 0.00430	0.480	9.80	< 0.00400	10.0
Maximum	238	328	6.23	5.80	9.60	0.000			161	< 1.40	4.00	< 0.500	< 0.00430	0.480	9.80	< 0.00400	10.0
Exceedences	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Permit LIMITS				25	30		40.0	49.0	126(mo) / 400 (max)	25	9.0	5.9	4.3				

Collection Services Task Summary Report for 2023

Task	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total To Date
Customer Service Calls	6	1	3	1	3	N/A	2	-	-				16
F.O.G. Inspection - Completed													-
F.O.G. Inspection - Fail													-
F.O.G. Inspection - Pass													-
Hot spot cleaning (total)*	26	-	-	34	-	-	24	-	-		-	-	84
Lift station inspection	19	16	23	18	19	23	19	16	19				172
Manhole inspection	179	159	136	178	251	129	113	161	147				1,453
Sewer line CCTV (feet)	8,060	7,295	N/A	N/A	1,733	14,994	15,111	11,222	6,916				65,331
Sewer line cleaning (feet)	52,372	53,787	58,466	67,147	86,073	69,050	46,911	54,601	48,574				536,981
SSO Response - Cat 1	0	0	0	0	0	0	0	0	0				0
SSO Response - Cat 2	0	0	0	0	0	0	0	0	0				0
SSO Response - Cat 3	0	0	0	0	0	0	0	0	0				0
USA Markings	160	46	45	28	30	44	42	48	55				498

*Note: Hot spot cleaning is performed quarterly



VALLEY SANITARY DISTRICT DEVELOPMENT SERVICES REPORT

10-Oct-23

Plan Check in Progress
Inspection in Progress
New Project

PROJECT NAME	STREET ADDRESS / CROSS STREET	CURRENT PROJECT STATUS	NEXT ACTION ITEM
Add'l Dwelling Unit - Cebroses Residence	83181 Blue Mountain Court	Plans submitted for additional dwelling unit. Plans approved and notified applicant 3/3/21. Permit 3967 7/26/2021	Inspect work improvements as scheduled.
Arroyo Crossing Phase 1 architectural plans	47555 Jefferson Steet/Highway 111	Architectural plans submitted for new apartment complex. Plans approved and notified applicant 12/22/21. Permit 3998 issued 1/6/22.	Inspect work improvements as scheduled.
Arroyo Crossing Phase 1 civil plans	47555 Jefferson Steet/Highway 111	Civil plans submitted for new apartment complex. Plan review completed. Plans approved and returned to applicant 12/22/21. Permit 3998	Inspect work improvements as scheduled.
Arroyo Crossing Phase 2 architectural plans	47777 Jefferson Steet/Highway 111	Architectural plans submitted for new apartment complex. Plans approved and notified applicant 1/21/22 Permit 4005 on 2/7/22.	Inspect work improvements as scheduled.
Arroyo Crossing Phase 2 civil plans	47777 Jefferson Steet/Highway 111	Civil plans submitted for new apartment complex. Plans approved and notified applicant 1/21/22. Permit 1005	Inspect work improvements as scheduled.
Autozone Jackson Street	41850 Jackson Street/aAvenue 42	Plans submitted for plan check. Sewer main relocation. Plans approved 1/21/21. Waiting for engineer to finalize easements docs. Permit 3954 issued 5/13/21.	10% warenty bond in place Reinspect and notice of acceptance Due 1/1/2023
Ave 42 Self Storage	82815 Ave 42/Showcase Blvd	Plans submitted, fee paid. Plans approved and notified applicant 3/2/23. Permit 4110 5/24/2023	Inspect work improvements as scheduled.
Bliss & Oasis Apts Sewer Improv. Plan	NW Corner of Bliss Ave and Oasis St	Plans submitted for Civil Plans, fee paid with check. Completed 1st plan check and returned to the applicant 12/15/22.	Perform 2nd plan check upon plan resubmittal.
Buzzbox	42625 Jackson Street #112	Plans submitted existitng building TI. Completed 1st plan check and returned to the City 2/22/19.	Perform 2nd plan check upon plan resubmittal.
Castro 80501 lot 50	Motorcoach CC 80501 Ave 48 Lot 50	Plans submitted, Permit 4056	Inspect work improvements as scheduled.
Chandi Plaza Building "B" Shell	81-971 Indio Blvd/Avenue 44	Plans submitted for plan check. Completed 1st check and returned to the applicant 10/13/20. Issued permit 3963 on 6/29/21.	Inspect work improvements as scheduled.
City Hall and Public Library Project	100/200 Civic Center Drive	Plans submitted and plan fee paid	Plans In Queue
Coco Palms Tract 38072-2	South East Corner of Avenue 49 and Jackson St	Plans submitted and plan check fee paid for phase 2 of housing tract. Pending signatures for phase 1 before proceeding	Waiting for owner to submit Bonds and Development agreement paperwork.
COD Child Development Center	45742 Oasis Street	Plans submitted for child development center. Plans approved and notified applicant 1/25/22. Permit 4025 4/21/22	Inspect work improvements as scheduled.
College of the Desert	45524 Oasis Street	Plans submitted for campus expansion. Plan review completed, plan approved and notified applicant 1/25/22. Permit 4026 4/22/22	Inspect work improvements as scheduled.
Community Valley Bank	81701 Hwy 111	Plans Submitted and fee paid for TI Improvement. Emailed Matt Seto for plan pick-up 4/11/23. Permit 4099	Inspect work improvements as scheduled.
EOS Fitness Hwy 111	Highway/Jefferson Street	Plans submitted for construction of new gym facility. Plans approved and notified applicant 4/27/20. Permit 4049	Waiting for Develoment Agreement and Bonds before owner can process permit paperwork.
Gabino's Creperie	82862 Miles Ave	Plans submitted, fee paid with credit card. Completed 2nd plan check and returned to the applicant 6/28/23. Permit #4120 on 08/09/23	Inspect work improvements as scheduled.
Gallery at Indian Springs	Jefferson St/Westward Ho Drive	Tract is Complete. Warranty Bond received 8/25/2021.	Notice of acceptance after 12 month warranty bond release.
Grease Interceptor T.I. at 82707 Miles (Encore Coff- 82707 Miles Avenue/ Corner of Miles and Oasis		Plans submitted for Plans and scope of work, fee paid with check. Completed 3rd plan check and notified applicant 3/16/23. Permit # 4095	Inspect work improvements as scheduled.
Hampton Inn Sewer Main Extension	North Wast Corner of Spectrum St and Atlantic Ave	Plans submitted for the extension of a public sewer main for Hampton Inn at Atlantic Ave. Plan check fees paid 7/11/18. Completed 2nd plan check and returned plans to the engineer 8/9/18. Plans approved and returned to enginner 8/27/18. Sewer Finaled 5/12/20.	Waiting for owner to submit Warranty Bond
Handels Ice Cream Shop	42225 Jackson Street/Avenue 42	Plans submitted for new suite TI. 2nd plan check completed and returned to the applicant 8/31/22. Permit 4064	Inspect work improvements as scheduled.
Homes 2 Suites Architectural Plans	80653 Hwy 111	Plans submitted for Hotel Homes2Suites	Plans In Queue
Homes 2 Suites Sewer Improvement Plan	80653 Hwy 111	Plans submitted for Sewer Improvement Plans, plan check fee paid.	Perform 2nd plan check upon plan resubmittal.
I-10 Monroe Conceptual Site Plans	SE Corner of Monroe and Ave 42	The Palms at Indio Sewer Plans submitted (Fee paid 8/19/22) Approved 6/8/23	Waiting for owner to submit Bonds and Development agreement paperwork.
I-10 Monroe Conceptual Site Plans Pt. 2	SE Corner of Monroe and Ave 42	Plans Submitted and fee paid for Sewer Development. Aproved 6/8/23	Waiting for owner to submit Bonds and Development agreement paperwork.
Indian Palms 32	Cochran Drive & Garland Road	Civil plans submitted for public sewer for 32 unit condo complex. 2nd plan check complete. 9/1/21. Plans approved 9/17/21.	Inspect work improvements as scheduled.

PROJECT NAME	STREET ADDRESS / CROSS STREET	CURRENT PROJECT STATUS	NEXT ACTION ITEM
Indio Behavioral Health Hospital	81655 JFK Court	Civil plans submitted for new mental health facility. Completed 1st plan check and returned to the engineer 12/2/19. Plans approved 6/24/20. Issued permit 3900 on 8/29/20.	Inspect work improvements as scheduled.
Indio Juvenile Court	47671 Oasis St/ Ave 48	Plans submitted to demo existing juvenile court building and construct new building on the same site. Plans approved, notified applicant project ready to permit 9/30/21. Permit # 4004 1/25/22	Inspect work improvements as scheduled.
Indio Marketplace Architectural	82227 Highway 111/Rubidoux	Plans submitted for mall TI. Completed 2nd check and notified applicant 8/2/22.	Waiting for owner to process permit paperwork.
Indio Marketplace Civil	82227 Highway 111/Rubidoux	Plans submitted for mall TI, Completed second plan check and returned to the applicant 11/12/21.	Waiting for owner to process permit paperwork.
Indio Palms RV	45-755 Commerce Street	Civil plans submitted for Public Sewer & Plan Fee Paid. Plans approved and notified applicant 3/20/23. Permit 4097 finalized 09/26/23	No further action required.
Indio Plaza Sewer Relocation	82126 Hwy 111/Monroe St.	Plans submitted for sewer line and manhole relocation. Plans approved and notified applicant 7/28/22.	Waiting for owner to process permit paperwork.
Indio Public Safety Center	46867 Bristol Street/Dr Carreon	Plans submitted for public safety center. Plans approved and returned to applicant 4/12/22. Permit 4052	Inspect work improvements as scheduled.
Indio Self Storage	81161 Indio Blvd	Plans submitted and fee paid for sewer improvement plans. Completed 3rd plan check and returned to the applicant 8/24/23.	Perform 4th plan check upon plan resubmittal.
Indio Sports Park	82600 Market St	Plans submitted for a sports park with concession stand	Plans In Queue
Indio Taphouse TI	82851 & 82867 Miles Ave	Plans submitted for Taproom in Oldtown Indio, fee paid with check. Plans approved and notified applicant 1/26/23. Permit 4083	Inspect work improvements as scheduled.
Jersey Mike's	42211 Jackson St Ste. 102 / Corner of Ave 42	Plans Submitted and fee paid for Sandwich Restaurant. Plans approved and notified applicant 2/17/23. Permit 4088	Inspect work improvements as scheduled.
John Nobles Apts civil plans	John Nobles Avenue/Rubidoux Street	Plans submitted for on-site private sewer. Completed 1st plan check and returned to applicant 7/12/22.	Perform 2nd plan check upon plan resubmittal.
Kings Castle Taco Architectural	82991 Bliss Avenue	Plans submitted for building TI for taco shop. Completed 2nd plan check. Civil plans submitted for review 7/21/22.	Waiting for owner to process permit paperwork.
Kings Castle Taco Civil Plans	82991 Bliss Avenue	Plans submitted for building TI for taco shop 7/21/22. Plans approved and notified the applicant 9/7/22.	Waiting for owner to process permit paperwork.
Las Plumas/Coco Palm Tract 38072-1	South East Corner of Avenue 49 and Jackson St	Plans submitted for 173 lot housing tract. Completed first plan check 4/27/21.	Waiting for owner to submit Bonds and Development agreement paperwork.
Lifestyle Center New Pool Toilet Rooms	48630 Monroe St - Indian Palms CC	Plans Submitted for restrooms at Indian Palms CC Pool. Plans approved 8/17/23. Permit #4122 08/24/23	Inspect work improvements as scheduled.
Magical Estates Tenant Spaces	82490 Highway 111/Arabia Street	Plans submitted for tenant suite TI's. Completed 1st plan check and returned to applicant 4/28/22.	Perform 2nd plan check upon plan resubmittal.
Motorcoach CC Lot 119	Motorcoach CC 80501 Ave 48 Lot 119	Plans submitted for casita/shade structure. Plans approved. Permit 4115 7/20/23	Inspect work improvements as scheduled.
Motorcoach Clubhouse Kitchen Remodel	Motorcoach CC 80501 Ave 48 Clubhouse	Plans submitted and plan fee paid	Plans In Queue
Nelson Chavez Accessory Dwelling Unit	43163 Deglet Noor	Plan submitted for new accessory dwelling unit, Plan approved and notified applicant 8/30/22 Permit 4113 7/5/23	Inspect work improvements as scheduled.
New Century Garage Doors	81740 Highway 111/Granada Dr.	Plans submitted for new sewer lateral connection. Plans approved and notified applicant project ready to permit 8/17/23.	Waiting for owner to process permit paperwork.
Octavio Rosales SFD	43645 Saguaro Street/Avenue 44	Plans submitted for new SFD. Completed 2nd plan check and returned to the City 8/26/19. Permit 4014 issued 3/18/22.	Inspect work improvements as scheduled.
Outdoor Resorts CC - Casita Addition	80394 Avenue 48, Lot 182	Plans submitted for casita addition and storage building. Plans approved and notified applicant 9/30/21	Waiting for owner to process permit paperwork.
Outdoor Resorts Lot 307	80394 Ave 48 Lot 307	Plans submitted for casita addition and outdoor BBQ. Permit 4112	Inspect work improvements as scheduled.
Palmera Apartments Civil	NE Corner of Monroe and Requa	Plans submitted for Sewer Developmet, fee paid. Completed 2nd plan check and returned to the applicant 3/9/23	Perform 3rd plan check upon plan resubmittal.

PROJECT NAME	STREET ADDRESS / CROSS STREET	CURRENT PROJECT STATUS	NEXT ACTION ITEM
Palmera Project Arc	Requa Ave West of Monroe PM 38493	Plans Submitted for Apt Homes with Clubhouse. Completed 1st plan check and returned to the applicant 9/11/23.	Perform 2nd plan check upon plan resubmittal.
Paradiso Tract 31815	East of Monroe North of Ave 41	New model homes under construction. Warranty Bond received 3/2/2023.	Notice of acceptance after 12 month warranty bond release.
Paradiso Tract 31815 & 31815-3	East of Monroe North of Ave 41	Plans submitted for new housing tract phases. Completed first plan check 2/25/21. Plans Approved 3/25/21.	10% warrenty bond in place Reinspect and notice of acceptance Due 3/1/2024
Parcel Map 36215	Dr. Carreon west of Van Buren	Civil plans submitted for 1st plan check. Plans approved and returned to the Engineer 1/18/18. Issued permit 3718 on 1/23/18.	Inspect work improvements as scheduled.
Pawley Pool Aquatic Facility	46350 Jackson Street/Date Ave.	Plans submitted for new Aquatic Center on existing public pool site. Project Expired in 2020. Resbmitted 10/25/21. Completed 3rd plan check and returned to the applicant 1/10/23.	Perform 3rd plan check upon plan resubmittal.
Private residence for Cristina Ayon	49115 Ridgeback Ct	Plans submitted, fee paid. Plans approved and notified applicant project ready to permit 12/22/22. Permit 4071 1/12/23	Inspect work improvements as scheduled.
Raising Canes Restaurant	Monroe Street/Showcase Parkway	Plans submitted for new restaurant building. Plans approved and notified the applicant 12/6/22.	Waiting for owner to process permit paperwork.
Ramon Chavez Accessory Dwelling Unit	43737 Oasis St / Ave 44	Plans submitted for plan check. Plans approved and notified applicant 10/13/20. Issued permit 3908 on 10/13/20.	Inspect work improvements as scheduled.
Ranch RV & self Storage	83734 Dr Carreon	Plans submitted, fee paid with check. Completed 2nd plan check and notified applicant 12/14/22. Permit 4090 2/28/2023	Inspect work improvements as scheduled.
Residence for Mr and Mrs Job Lopez	49-134 Ridgeback Ct	Plans Submitted and fee paid for private residence. Plans approved and notified applicant 3/16/23. Permit 4093	Inspect work improvements as scheduled.
Ridgeback Ct Family Residence	49128 Ridgeback Ct	Plans submitted for single family residence, plan check fee paid. Plans aproved. Permit 4114 7/20/23	Inspect work improvements as scheduled.
Roma Furniture Store	81691 Hwy 111, #101 - next to El Super	Plans submitted for T.I. Furniture Store. Plans approved, notified applicant project ready to permit. Finaled 9/1/2023	No further action required.
Rosa Rebollar Accessory Dwelling Unit	81179 Helen Ave/Swingle Ave	Plan submitted for new accessory dwelling unit. Project built, notified applicant project ready to permit 6/22/23.	Waiting for owner to process permit paperwork.
Showcase Indio Pad 4 Shell	42225 Jackson Street/Avenue 42	Plans submitted for new retail shell buidling. Plans approved and notified applicant 7/26/22. Permit 4055	Inspect work improvements as scheduled.
Sunburst RV Storage	43250 Sunburst Street/Oleander Avenue	Plans submitted for new RV storage facility. Completed 1st check and notified applicant 3/21/22. Permit 4020 4/7/22	Inspect work improvements as scheduled.
Tarra Lago 32341-12	North of Avenue 44 & East of Harrison	First Plan Complete 12/16/20. Plans Approved 2/19/21.Maintenance Bond in place 8/16/22.	10% warrenty bond in place Reinspect and notice of acceptance Due 8/16/2023
Terra Lago Four Seasons Tract 32287	North of Avenue 44 & East of Harrison	Civil plans submitted for plan check. Plans Approved 4/26/21.	10% warrenty bond in place Reinspect and notice of acceptance Due 8/1/2024
Terra Lago Four Seasons Tract 32288-1	North of Via Terra Lago and East of Golf Cent	Civil plans submitted for Public Sewer. 1st plan check complete and returned redlines 11/24/21 2nd plan check complete 1/18/22.	Inspect work improvements as scheduled.
Terra Lago Four Seasons Tract 32288-F	North of Via Terra Lago and East of Golf Cent	Civil plans submitted for Public Sewer. 1st plan check complete and returned redlines 3/29/22 Aproved 7/1/23	Inspect work improvements as scheduled.
Terra Lago Four Seasons Tract 32288-F	North of Via Terra Lago and East of Golf Cent	Civil plans submitted for Public Sewer. Plans Approved 7/1/22	Inspect work improvements as scheduled.
Terra Lago Four Seasons Tract 32341-F	North of Avenue 44 & East of Harrison	Civil plans submitted for plan check. Completed 1st plan check and notified applicant 5/1/20. Plans Approved 8/15/20.Maintenance Bond in place 8/16/22	Inspect work improvements as scheduled.
Terra Lago Four Seasons Tract 32462-2	North of Avenue 44 & East of Harrison	Plans approved from previous developer. Development agreement has been recorded. Bonds have been submitted. Construction work is in progress.	Inspect work improvements as scheduled.
Texas Roadhouse Restaurant	42790 Jackson Street	Plans submitted for Steakhouse, fee paid with check. Plans approved and notified the applicant 2/9/23. Permit 4092 3/7/23 Finaled	No further action required.
Tim & Lois Eklund Site 105	Motorcoach CC 80501 Ave 48 Lot 105	Plans submitted, Permit 4068	Inspect work improvements as scheduled.
Tower Market #965	Intersection Monroe Street/Dr Carreon	Plans submitted for Convienient Store/Gas Station, fee paid with check. Plans approved nd notified applicant project ready to permit 6/5/23. Permit 4111 6/9/2023	Inspect work improvements as scheduled.
Tower Market #965 Architectural	Intersection Monroe Street/Dr Carreon	Plans Submitted and fee paid for architectural plans for a gas station. Plans approved and notified applicant project ready to permit 6/5/23. Permit 4111 6/9/2023	Inspect work improvements as scheduled.
Woodsprings Suites Ext Stay Hotel	42-425 Jackson St.	Civil plans submitted for Public Sewer & Plan Fee Paid. Plans approved 2/14/23 and notified applicant	Waiting for owner to process permit paperwork.

	September	Fiscal Year
New Projects	4	6
Projects Permitted		2
Projects Finaled	3	7

Monthly Capital Improvement Project Update - October 2023				
Project Title	Project Description	Current Status	Fiscal Year Budget	Total Spent to Date
Reclaimed Water Project Phase 1	The contract for this project was awarded to Schneider Electric / Stantec. The project design cost was \$2,200,000 and the project schedule was approximately 460 days. The Reclaimed Water Project – Phase 1 will replace an aging and capacity restricting grit chamber and provide redundancy by adding a second digester and expanding the bar screens. This project will also include adding a biofilter and a sludge thickener unit. The Guaranteed Maximum Price (GMP) has been approved by the Board. 100% design plans have been approved by staff.	Walsh is currently working on building the new grit chamber and digester walls. Steel plate shoring is being installed in preparation of excavation for the rotary screw thickener facilities.	\$39,900,000.00	\$4,771,933.97
Collections System Rehabilitation Design Projects	There are currently two projects in the design phase for the Collections System Rehabilitation program. The first is the Calhoun Lift Station Improvement Project which will address issues with the Calhoun Lift Station observed during the lift station evaluation project from last fiscal year. They will address the bubbling wet well lining, aging discharge piping, and deficient electrical equipment. The second project is the Southeast Indio Sewer Improvement Project which will include the rehabilitation of existing sewer mains and manholes in another portion of the downtown area and the realignment of a sewer main located in the backyards of residences between Marshall and Grace Street.	VSD staff have returned comments on the 65% plans for the Calhoun Lift Station and are currently reviewing the specifications. VSD staff are currently reviewing the 65% plans for the Southeast Indio Sewer Improvement Project.	\$400,000.00	\$151,446.42
Downtown Indio Rehabilitation Project	The Downtown Indio Rehabilitation Project is currently under construction and covers the rehabilitation of existing sewer mains and manholes in a portion of the downtown area, the upsizing of two existing sewer mains between Grace and Salton Street, several point repairs, and the installation of new public sewer in the Indio Motor Machine property. The project was awarded to GRBCON Inc.	The contractor has completed all the rehabilitation and the sewer upsizing. The contractor is currently working on finishing the remaining point repairs before moving on to the new public sewer.	\$2,200,000.00	\$1,179,641.41
Westward Ho Sewer Siphon Replacement Design and Construction	Westward Ho Drive Sewer Siphon Replacement project. This is a FEMA funded project to replace the damaged sewer siphon from the February 2019 storm. Permitted Plans have been signed by CVWD and have been approved by the City of Indio and La Quinta. Staff is waiting for a contractor to be awarded the project to finish filing an encroachment permit application as required by CVWD for the permanent pipeline crossing of the channel. 95% Plans and specifications have been sent to FEMA for their review and approval.	This project is currently being held up by FEMA. VSD needs FEMA approval before proceeding with bidding and construction which was expected by February 2023. The recent storm Hillary has exposed the sewer siphon once again. VSD worked with IWA on emergency repairs to protect the sewer siphon and IWA's directly adjacent 10-inch watermain.	\$10,721,000.00	\$0.00
New Training and Office Building and Laboratory Building	VSD has chosen SGH Architects as the architectural firm for the preliminary design of a new single story training/office building and new laboratory building. Staff have selected a new location for the training/office building that will allow the single-story building with minimal demolition. The architect has completed the schematic design and cost estimate for both the training/office building and laboratory building. An onsite survey was conducted on July 7th. SGH Architects is continuing with the final design of both the Office & Training and Laboratory Buildings. SGH has submitted 50% design plans which include both buildings for staff review and comment in December 2021.	This project is being delayed for a year or two to allow other priority projects to proceed and maintain our debt coverage.	\$0.00	\$0.00
Additional Parking and Landscaping	The District is need of additional parking for employees and customers. Staff proposes to remove the lawn at the front of the property and replace it with parking and drought tolerant landscaping.	A preliminary design of the Project has been completed. In que for the next steps.	\$0.00	\$0.00

Environmental Compliance Summary Report for 2023

Task	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total YTD
Pretreatment													
Customer Service Calls	11	10	2			5	6	9					43
Commercial Approval Letters	4	3	1			7	1	2					18
Change of Ownership Inspection	3					4	3	5					15
SIU Permit Compliance	3	3	3	3			2	1					15
FOG-FSE Inspections Completed	22	14	12	6	14	31	23	56					178
Commercial Inspections Completed	4	5	1	1		9	3	4					27
Environmental & Collections investigations	3	4					1						8
Failed Inspections or NOV													0
Total # of Inspections	32	26	16	10	14	40	29	61	0	0	0	0	228
Laboratory													
# of Collected Samples	266	266	327	255	296	258	277	260					2,205
# of Tests (Analyses)	548	537	618	514	574	534	591	628					4,544
# of Samples sent to Contract Labs	40	41	36	32	55	31	28	29					292
# of Contracted Tests (Analyses)	73	142	62	63	149	46	38	41					614
% of Samples performed In-House	85.0%	84.6%	89.0%	87.5%	81.4%	88.0%	89.9%	88.8%					86.8%

September 2023



Wastewater Surveillance

Your Guide to VSD & Viruses



VSD Program

Wastewater surveillance is used to monitor the presence of infections within VSD's service community by tracking trends in virus rates.

Public health officials can utilize the data to prevent and control disease within our service area.

Websites VSD Program data shared with:

- [COVIDPoops19](#)
- [Cal-SuWers Network](#)
- [WastewaterScan](#)
- [CDC Covid Tracker](#)
- [Biobot Covid Tracker](#)

PodCast: [WEF "Sewer Signals"](#)

IN THIS ISSUE

NWSS PROGRAM

Program contents & trends

WASTEWATERSCAN PROGRAM

Program contents & trends

PROGRAM TIMELINE

Program start to current events



Samples

Influent 24hr-composite

Collected: Tues, Thurs

Program update

Approved Temporary Extension through September 15th.

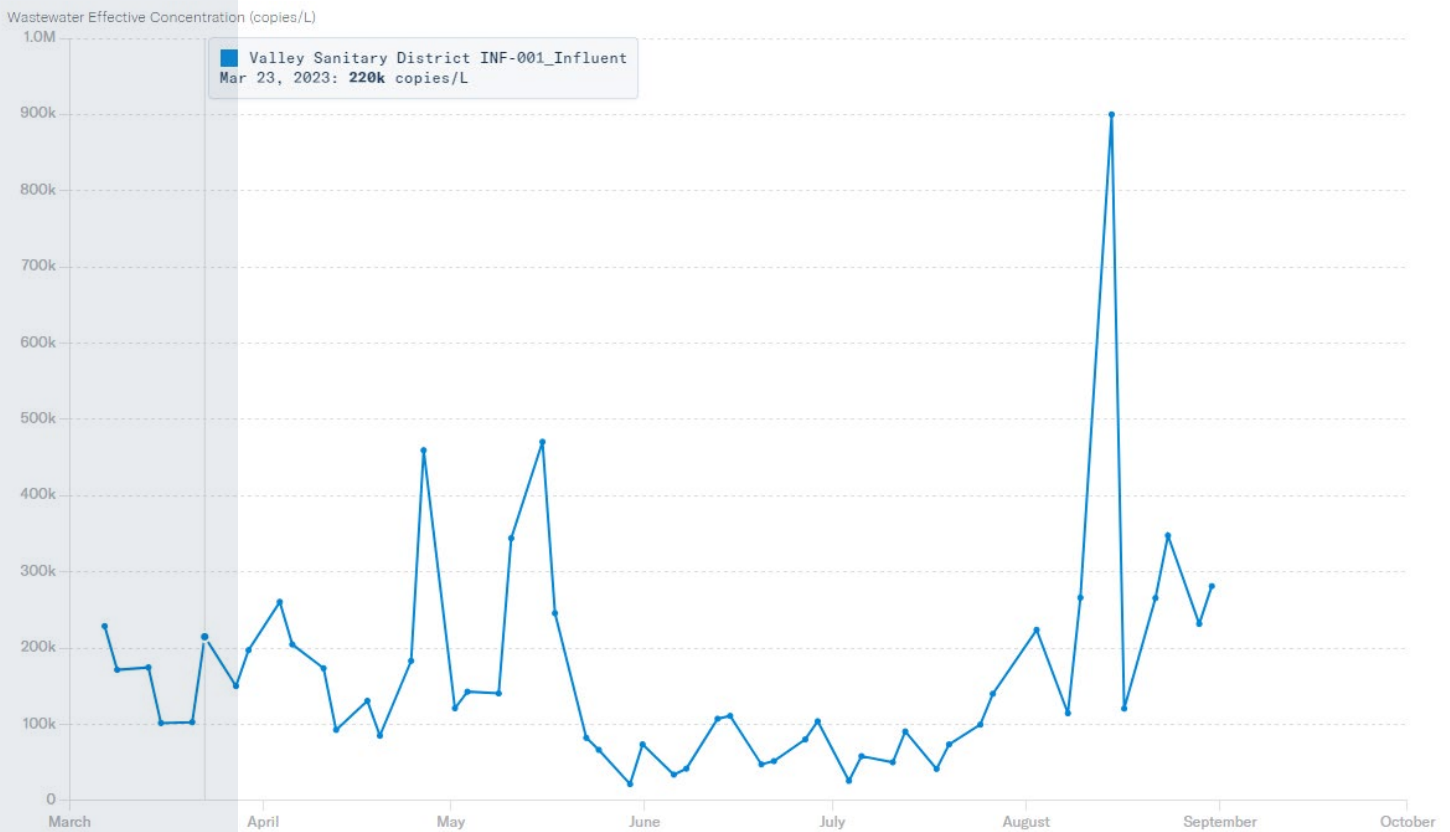
MPox - Jan 2023 - Current

Virus Concentration - NOT DETECTED

Norovirus

CDC Parameter addition - Result release soon

COVID-19 - Mar 2023 - Current





Partnerships: Stanford University, Emory University, Verily

Website: [WastewaterScan](https://www.wastewaterscan.com)

Samples

Primary Sludge grab samples
Collected: Mon, Wed, Fri

Program update

Coming Late Summer: estimate end Sept 2023
13 pathogens will be monitored.

Seasonal & Emerging Respiratory Pathogens

SARS-CoV-2 +Variants	Severe Acute Respiratory Syndrome; spread through droplets from coughs, sneezes, or talking.
Influenza A & B	Seasonal respiratory viruses can cause flu pandemics
Respiratory Syncytial Virus (RSV)	Common respiratory virus causing mild, cold-like symptoms. Can be fatal to infants and older adults. Cause Bronchiolitis and pneumonia
Metapneumovirus (hMPV)	Seasonal respiratory virus related to RSV.
Parainfluenza	Seasonal respiratory illness
Enterovirus	Severe respiratory illness and acute flaccid paralysis

Important Enteric Pathogens:

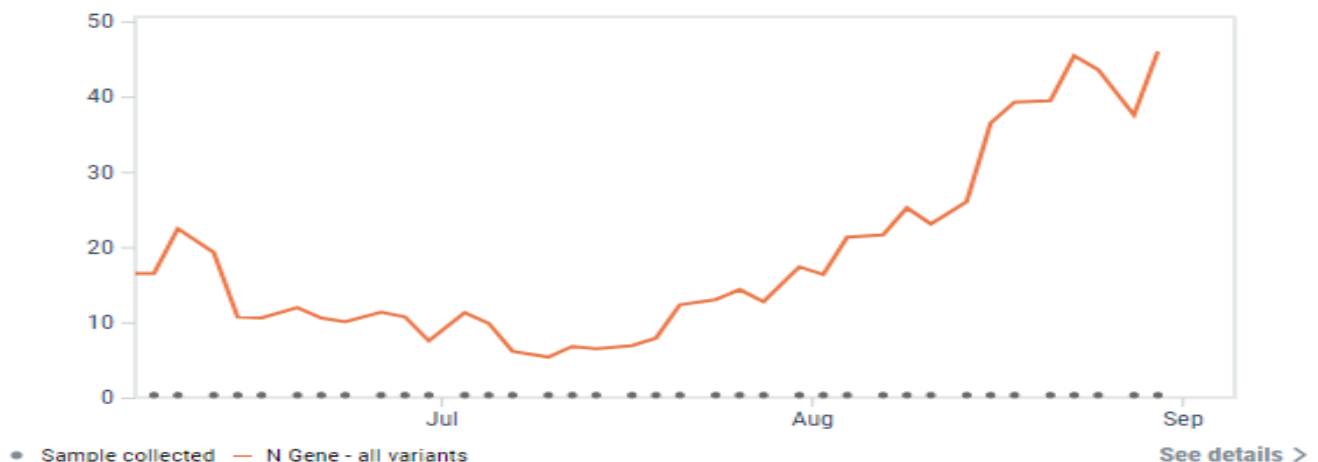
Adenovirus Group	Major cause of GI illness
Rotavirus	Major cause of GI illness, vaccine preventable
Human Norovirus GII	Leading cause of GI illness

Emerging & Outbreak pathogens of concern:

Candida auris	Emerging pathogen, multidrug resistant fungal infection
Hepatitis A	Cause intermittent outbreaks, vaccine preventable

Virus & Pathogen Trackers

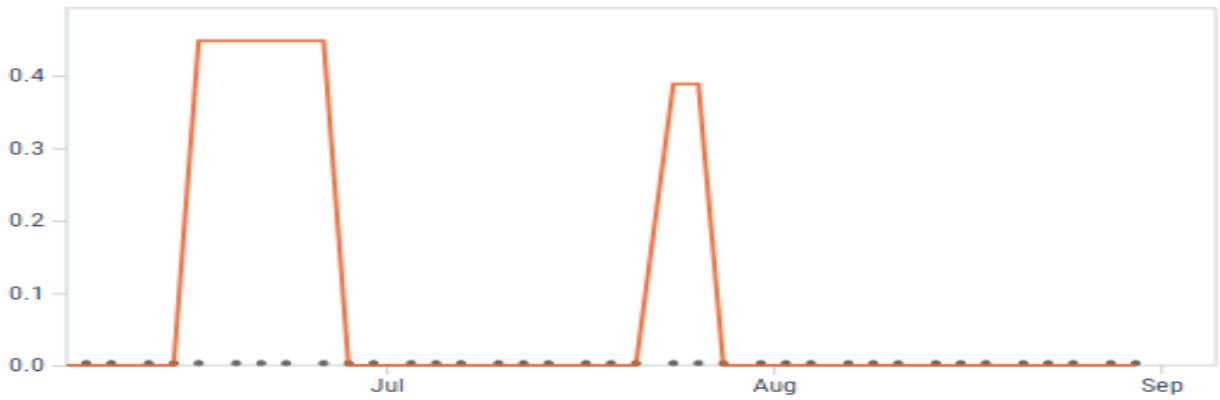
SARS-CoV-2



Influenza



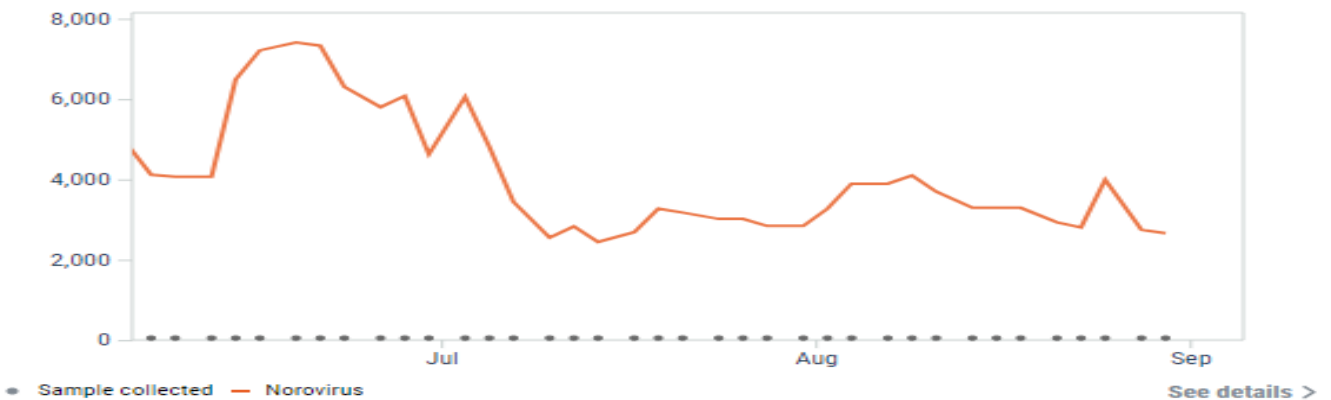
Respiratory syncytial virus (RSV)



Human Metapneumovirus



Norovirus



PROGRAM TIMELINE

Jun - Oct 2021	US Dept. Health & Human Services (HHS) partnered with Biobot Analytics (12-week fully Funded Program)
Oct - Dec 2021	GTmolecular Labs (VSD sponsored)
Jan - Apr 2022	CDC National Wastewater Surveillance System (NWSS) partnership with LuminUltra (12-week fully Funded Program)
Jan - Jul 2022	Biobot Network (6-month fully Funded Program)
Apr 22 - Jul 23	CDC NWSS Partnership with Biobot Analytics (fully Funded Program)
	<i>*Extended thru mid-Sept 2023</i>
Aug 2022 - ongoing	WastewaterScan: Stanford Initiative partnered with Verily Life Sciences (18-month Stipend funded program)

Upcoming Projects:

- Requests to participate in upcoming EPA Grant studying "Anti-microbial resistance and wastewater treatment" in understanding environmental burdens and public health impacts of municipal wastewater sources and biosolids use in the environment.
- Project Team: Arizona State University, Virginia Tech, University of South Florida, West Virginia University, and Emory.



Valley Sanitary District

DATE: October 10, 2023
TO: Board of Directors
FROM: Holly Gould, Clerk of the Board
SUBJECT: DRAFT MINUTES OF THE OPERATIONS COMMITTEE MEETING -
OCTOBER 3, 2023

Suggested Action

Discuss

Strategic Plan Compliance

GOAL 6: Improve Planning, Administration and Governance

Fiscal Impact

There is no fiscal impact from this report.

Environmental Review

This does not qualify as a project for the purposes of CEQA.

Background

Attached are the draft minutes of the Operations Committee meeting held on October 3, 2023.

Recommendation

Staff recommends that the Board receive an update from the Operations Committee members.

Attachments

[03 Oct 2023 Meeting Minutes.edited.doc](#)

**VALLEY SANITARY DISTRICT
OPERATIONS COMMITTEE
REGULAR MEETING MINUTES**

October 3, 2023

A meeting of the Valley Sanitary District (VSD) Operations Committee was held at 45-500 Van Buren Street in Indio, California, on Tuesday, October 3, 2023.

1. CALL TO ORDER

Chairperson Jacky Barnum called the meeting to order at 1:00 p.m.

2. ROLL CALL

Directors Present:

Chairperson Jacky Barnum

Committee Member William Teague

Staff Present:

Jason Dafforn, General Manager; Ron Buchwald, District Engineer; Dave Commons, Chief Operating Officer; and Holly Gould, Clerk of the Board

3. PLEDGE OF ALLEGIANCE

4. PUBLIC COMMENT

This is the time set aside for public comment on any item not appearing on the agenda. Please notify the Secretary before the meeting if you wish to speak on a non-hearing item.

None.

5. DISCUSSION / ACTION ITEMS

5.1 Approve Minutes for the June 6, 2023, Operations Committee

Committee member Teague motioned to approve the minutes of the Operations Committee held on June 6, 2023. Chairperson Barnum seconded the motion.

5.2 Laboratory Calibration & Verification

Mario Luna, Laboratory Technician II, gave a presentation to the Committee explaining laboratory calibration and verification practices and their importance to the sampling and testing done by the District.

5.3 Provide an Update on the Lystek Biosolids Conversion Project

Ron Buchwald, District Engineer, reported that Staff has recently met with Lystek to discuss their proposed draft Feasibility Study for Implementation of Lystek THP Advanced Biosolids Management Program. VSD staff provided several comments and revisions to the report and discussed capital and life cycle costs. Lystek staff will be finalizing the report by addressing VSD comments and revisions. The next step will be a second site visit and further discussion of the types of partnerships and financing available to VSD.

5.4 Provide Capital Improvement Program Update

The Staff has reached out to NBS and requested an update to the District's sewer rate model with our current fiscal year budget and revised Capital Improvement Plan. This update will determine what the financial outcomes will be under the current scheduled rate increases. In addition, Staff will evaluate how much capital budget funds are available and can further adjustments provide opportunities for the District to move forward on any delayed CIP projects. Once the results of the update are received, they will be shared with the Committee.

6. ADJOURNMENT

There being no further business to discuss, the meeting adjourned at 1:33 p.m. The next regular committee meeting will be on December 5, 2023.

Respectfully submitted,
Holly Gould, Clerk of the Board
Valley Sanitary District