



Budget & Finance Committee Meeting
Tuesday, March 1, 2022 at 1:00 PM
Valley Sanitary District Board Room
45-500 Van Buren Street, Indio, CA 92201

Valley Sanitary District will be open to the public and Board Meetings will be conducted in person and remotely through Zoom in compliance with Government Code Section 54953(e) (AB 361).

**Members of the public may view and participate in meeting via the following
Zoom link: <https://us06web.zoom.us/j/84253304973> Meeting ID: 842 5330 4973**

Consistent with Government Code Section 54953(e) (Assembly Bill 361), members of the Valley Sanitary District Board of Directors and District Staff are permitted to attend the meeting by teleconference and such teleconference locations are not accessible to the public and are not subject to special posting requirements.

Members of the public who desire to address the Board of Directors during the meeting may do so either in person or orally or in writing. **Oral testimony** can be provided in person or during the virtual live session. Individual speakers 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. Your name will be called when it is your turn to speak.

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.** Please specify on the subject line of the email "Oral Comment" and note the agenda item number or if general comment (i.e., non-agenda item). To participate during the live session, please keep track of the meeting proceedings by watching the meeting via Zoom. Please raise your hand and your name or other identifier (phone number) will be called when it is your turn to speak.

Written Comments: If you are unable to provide comments during the meeting (whether in person or the

virtual Zoom session), written public comments on agenda and non-agenda items, or both, may be submitted by email to the Clerk of the Board at hgould@valley-sanitary.org . Please specify on the subject line the agenda item number or if general public comment (i.e., non-agenda item). For example, on a specific item, write "agenda item 8a" on the email subject line. **Email/Written comments must be received by the Clerk of the Board no later than 11:00 a.m. on the day of the meeting.**

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1. CALL TO ORDER

- 1.1. Roll Call
- 1.2. Pledge of Allegiance

2. PUBLIC COMMENT

This is the time set aside for public comment on any item not appearing on the agenda. Please notify the Secretary in advance of the meeting if you wish to speak on a non-hearing item.

3. DISCUSSION / ACTION ITEMS

- 3.1. RFP Results - Review and Revision Employee Handbook and District Policies 3 - 36
 - [3.1 RFP HR Services.pdf](#) 
 - [3.1 Attachment A Proposal for Professional HR Services.pdf](#) 
 - [3.1 Attachment B List of RFP submitted.pdf](#) 
 - [3.1 Attachment C Final Scores RFP.pdf](#) 
- 3.2. Update on the Reclaimed Water Project Phase 1 Design Build Financing Progress 37
 - [3.2 Revenue and Expense Projections Bank of America.pdf](#) 

4. FUTURE MEETING ITEMS

5. ADJOURNMENT

Pursuant to the Brown Act, items may not be added to this agenda unless the Secretary to the Board has at least 72 hours advance notice prior to the time and date posted on this notice.



**Valley Sanitary District
Budget & Finance Committee
March 1, 2022**

TO: Budget & Finance Committee

FROM: Jeanette Juarez, Business Services Manager

SUBJECT: Request for Proposal (RFP) Review and Revision of the District Employee Handbook and District Policies

<input type="checkbox"/> Board Action	<input type="checkbox"/> New Budget Approval	<input type="checkbox"/> Contract Award
<input checked="" type="checkbox"/> Board Information	<input type="checkbox"/> Existing FY Approved Budget	<input type="checkbox"/> Closed Session

Executive Summary

The purpose of this report is to provide the results of the RFP for the review and revision of the District employee handbook and District policies to the Budget and Finance Committee.

Strategic Plan Compliance

This item complies with VSD Strategic Plan Objective 6: Improve Planning, Administration, and Governance.

Fiscal Impact

The total cost estimate for review and revision of the District’s Employee Handbook and District Policies is \$53,625 - \$94,250. Estimated 165-290 hours billed.

Background

Valley Sanitary District released an RFP for the review and revision of the District employee handbook and District policies on January 21, 2022. The scope of services included preparing a draft update of the current Employee Handbook to reflect best practices and recommended policies and to ensure legal compliance with current legislation. Consultant shall make every reasonable effort to streamline the Employee Handbook so that it is an easy-to-use guide for both District employees and management while ensuring the necessary professional outcomes and appropriate policy language are present to provide a best-practice product that also protects VSD from employment practices liability.

The RFP invited responses from qualified consultants or Human Resources professionals experienced with municipal organizations to complete a comprehensive review and make recommendations to update the VSD employee handbook and policies.

The District received four (4) proposals. All proposals were reviewed and rated based on various factors including staff experience, references, and ability to understand and implement the scope of work. Burke, Williams, & Sorenson, LLP, received the highest overall score. Their proposal was clear, concise, and demonstrated a strong understanding of the scope of work.

The District Budgeted \$25,000 for the revision of the employee handbook in the fiscal year 2021/22. Three of the four proposals were all above the budgeted amount. Staff is seeking direction from the Finance and Budget Committee before the item is presented to the Board for approval.

Recommendation

Staff recommends that the Budget & Finance Committee review the Burke, Williams, & Sorenson, LLP proposal and provide comments and feedback.

Attachments

Attachment A: Proposal for Professional Auditing Services

Attachment B: List of RFP's submitted

Attachment C: Final Scores



Proposal to Provide
Comprehensive Employee
Handbook and Policy Review for

VALLEY SANITARY DISTRICT

Proposed Lead Attorney
Katy A. Suttorp

Burke, Williams & Sorensen, LLP
1851 East First Street, Suite 1550
Santa Ana, California 92705

p: 949.265.3403
e: ksuttorp@bwslaw.com

Submitted February 8, 2022



February 8, 2022

Via email to jjuares@valley-sanitary.org

Jeannette Juarez
Business Services Manager
Valley Sanitary District
45-500 Van Buren Street
Indio, California 92201

Re: Proposal to Provide Comprehensive Employee Handbook and Policy Review

Greetings:

On behalf of Burke, Williams & Sorensen, LLP ("Burke"), I am pleased to submit this response to the Request for Proposals issued by the Valley Sanitary District ("District"). Burke welcomes the opportunity to work collaboratively with the District to review and revise the District's Employee Handbook and District Policies.

Burke was founded in 1927, and is a diverse, dynamic, and preeminent public law firm. For over 90 years, the representation of public agencies has been the cornerstone of Burke's legal practice. The firm currently serves the legal needs of over 200 local governmental entities, including sanitary and other special districts, cities, counties, joint powers authorities, and school districts. We take pride in our long-standing tradition of providing excellent legal services at reasonable rates and believe our team at Burke offers the depth, expertise, and commitment that the District seeks from its counsel. Ours is a rich tradition of providing high quality advice and services to public agencies. We are prepared to work closely with you in budgeting, performing, and reporting on the legal services you need.

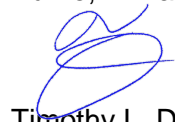
As described in the attached materials, we propose that Katy A. Suttorp serve as point of contact. Katy will be assisted by a team selected to provide able legal representation tailored to the District's needs including partner Monica Sanchez McQueen and associate N. Richard Shreiba.

Jeannette Juarez
February 8, 2022
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Thank you for considering us. If you have any questions regarding this proposal, or if you would like additional information, please feel free to contact me at the number listed above. I look forward to hearing from you.

Very truly yours,

Burke, Williams & Sorensen, LLP



Timothy L. Davis
Partner and Chair,
Labor and Employment Practice Group

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BURKE, WILLIAMS & SORENSEN, LLP

Burke, Williams & Sorensen, LLP is a California limited liability partnership. Burke is comprised of 25 owners under the leadership of a Management Committee and Managing Partner. Firm management includes owners who practice substantially or entirely in the area of municipal law, and the firm has a longstanding commitment to the needs of its municipal clients. Details of our firm are listed below.

Firm Name	Burke, Williams & Sorensen, LLP
Founded	1927
Name, Address, Telephone Number, and Email Address of the Proposer's Point of Contact	Katy A. Suttorp Burke, Williams & Sorensen, LLP 1851 East First Street, Suite 1550 Santa Ana, California 92705 Tel: 949.265.3403 Email: ksuttorp@bwslaw.com
Number of Attorneys/Staff	136/60
Headquarters Office	Burke, Williams & Sorensen, LLP 444 South Flower Street, Suite 2400 Los Angeles, California 90071 Tel: 213.236.0600 Fax: 213.236.2700
Additional Firm Offices	
Inland Empire 1770 Iowa Avenue, Suite 240 Riverside, California 92507 Tel: 951.788.0100 Fax: 951.788.5785	San Francisco 1 California Street, Suite 3050 San Francisco, California 94111 Tel: 415.655.8100 Fax: 415.655.8099
Oakland 1901 Harrison Street, Suite 900 Oakland, California 94612 Tel: 510.273.8780 Fax: 510.839.9104	Silicon Valley 60 South Market Street, Suite 1000 San Jose, California 95113 Tel: 408.606.6300 Fax: 408.606.6333
Palm Desert 73-929 Larrea Street, Suite 4A Palm Desert, California 92260 Tel: 760.776.5600 Fax: 760.776.5602	San Rafael 181 Third Street, Suite 200 San Rafael, California 94901 Tel: 415.755.2600 Fax: 415.482.7542
San Diego 501 West Broadway, Suite 1600 San Diego, California 92101 Tel: 619.814.5800 Fax: 619.814.6799	Ventura County 2310 East Ponderosa Drive, Suite 25 Camarillo, California 93010 Tel: 805.987.3468 Fax: 805.482.9834

About Burke

For over 90 years, the representation of public agencies has been the cornerstone of Burke's legal practice. Burke provides public entities with a full range of legal, advisory, transactional, and litigation services organized into nine practice groups: Public Law; Labor and Employment Law; Construction Law; Litigation; Environmental, Land Use and Natural Resources; Real Estate and Business Law; Insurance Coverage and Litigation; Intellectual Property; and Education Law. The firm's 136 attorneys serve clients from ten offices throughout California. With regional offices in Los Angeles, the Inland Empire, Marin County, Oakland, Orange County, Palm Desert, San Diego, San Francisco, Silicon Valley, and Ventura County, as well as modern modes of communication and travel, we can easily be where our clients need us to be, when they need us to be there.

The legal environment in which public entities are required to function is both diverse and complex. Recognizing this, our Public Law Practice Group contains many sub-groups and teams allowing our attorneys to specialize in particular areas of public law while still maintaining general public law expertise. These sub-groups include, but are not limited to, the following:

Public Entity Administration and Municipal Law	Land Use and Environmental Law	Public Sector Labor and Employment
<ul style="list-style-type: none"> ▪ Open Meetings Laws (Brown Act) ▪ Public Records Act ▪ Conflicts of Interest ▪ Election Law Issues – Initiative, Referendum and Recall ▪ Public Finance and Taxation ▪ Public Works and Contracts ▪ Solid Waste Franchising ▪ Trial and Appellate Litigation ▪ Asset Foreclosure ▪ Section 1983 Civil Rights Claims 	<ul style="list-style-type: none"> ▪ Land Use Planning and Zoning ▪ California Environmental Quality Act (CEQA) ▪ Development Agreements ▪ Growth Management ▪ Historic Preservation ▪ Annexation and Incorporation – LAFCO Proceedings ▪ Redevelopment and Economic Development ▪ Endangered Species ▪ Sustainability and Green Building ▪ Water Law and Public Trust 	<ul style="list-style-type: none"> ▪ Grievances ▪ Labor Negotiations ▪ Disciplinary Hearings ▪ Personnel Advice ▪ Trial and Appellate Litigation ▪ Meyers-Milias-Brown Act ▪ Public Safety Officers Procedural Bill of Rights ▪ Title VII ▪ California FEHA ▪ ADA ▪ CalPERS (PERL, PEPR, PEMHCA)

More than one-half of our work is for public entities and we currently serve the legal needs of over 200 governmental entities. We are frequent lecturers, speakers, and teachers to numerous associations and clients. Our public lawyers collectively have hundreds of years of experience as general and special counsel for special districts, cities, towns, counties, and other public agencies. The biographies of all of our lawyers, with descriptions of their expertise and experience, can be found on our website at www.bwslaw.com.

Staffing

Burke is fortunate to have long-tenured, well-trained, and very capable secretarial and paralegal staff available to serve our attorneys and our clients efficiently. Whenever possible, we rely on our in-house resources in an effort to contain and reduce legal costs for our clients.

As of the date of this proposal, Burke employs over 60 support staff in our 10 offices. Burke maintains a Word Processing Department, a Librarian, litigation support professionals, information technology, accounting, and managerial staff in its Los Angeles office that are available by e-mail or phone to assist other offices or attorneys in the field. We have attorneys and experienced support staff to handle very large, complex, and document intensive cases.

KEY PERSONNEL AND ROLES

Our proposed team includes partners Katy A. Suttorp and Monica Sanchez McQueen and associate Richard Shreiba. Lead Counsel may also draw upon the assistance or expertise of any other qualified Burke attorneys, in consultation with the District. Brief summaries of their experience follow, and their full professional summaries are attached.

Monica Sanchez McQueen

Monica Sanchez McQueen is a partner in Burke's Los Angeles office, representing public sector employers in all aspects of labor and employment law. Ms. McQueen has worked at Burke for over 15 years. Monica has an extensive counseling practice and works directly with public sector management on a daily basis. She routinely advises public employers on matters involving pre-hiring and hiring, due process, disciplinary procedures, the Meyers-Milias-Brown Act, the Public Safety Officers Procedural Bill of Rights Act, the Firefighters Procedural Bill of Rights Act, discrimination, harassment, retaliation, wrongful termination, defamation, leaves of absence, wage and hour, public employee retirement plans, whistleblower violations, freedom of speech and association, and privacy.

Monica regularly works with employers to be proactive in their compliance efforts to avoid increased risks and potential costly penalties. In doing so, she works with employers at every stage, assessing their personnel and administrative rules, policies, and procedures, helping them negotiate and implement legally compliant policies, and providing comprehensive audit services to assess and promote ongoing compliance. Monica's practice involves many years of working in partnership with public agencies and her extensive experience and exclusive focus on labor and employment issues help her meet our clients' needs when it comes to compliant employment policies and procedures.

Monica drafts and revises a variety of personnel rules, employee handbooks, administrative rules and policies, department manuals, personnel ordinances, memoranda of understanding and collective bargaining agreements, and employer-employee resolutions. In this role, Monica works closely with our clients in order to assist employers on a broader scope and effectively help them define their values, culture and philosophy within their policies and procedures, which will guide their specific workforce.

Monica has served as negotiator with all employee groups, including general employees, management, and Police and Fire. In addition, she provides labor negotiations advice to numerous public agencies, including analyzing scope of bargaining issues, reviewing and revising proposals and draft responses, advising on unit modification and appeal procedures, revising and preparing local rules, and strategizing regarding related legal issues. Monica has overseen Joint Labor-Management Committees for City clients to facilitate adoption of new rules and policies for both represented and unrepresented employees.

Monica has represented and advised employers on matters involving numerous federal and state law claims, including discrimination, harassment, retaliation, wrongful termination, defamation, leaves of absence, whistleblower violations, freedom of speech, and association, privacy, and wage and hour, including collective and class action suits. Monica is a presenter and trainer at various conferences, including the Joint Powers Insurance Authority (JPIA) Human Resources Academies. She has contributed to the development of multiple trainings for Human Resources professionals in the public sector and trained on a myriad of topics including legislative updates, evaluations, conducting investigations, wage and hour compliance, workplace violence, and workplace conduct. Monica also regularly presents harassment prevention training for supervisors, general employees and elected officials.

Katy A. Suttorp

Katy Suttorp is a partner in Burke's Orange County office and has been with Burke her entire legal career, starting at the firm as a law clerk in 2003. Katy was admitted to the California Bar in December 2003. Her entire 18-year practice has focused primarily on representing and counseling public agency employers, including numerous special districts, cities, JPAs, school districts, and community college districts. She provides advice to clients in all aspects of labor and employment, including employee discipline and due process, disability accommodation and interactive process, wage and hour audits and disputes, workplace investigations, effective evaluations and strategies for addressing performance issues, leaves and benefits, drug testing issues, employee speech and privacy, pension audits and compliance, and Affordable Care Act compliance. In doing so, Katy addresses not only the immediate issues, but also works with clients to implement changes to practice and policy to avoid future potential liability and address new legal and legislative developments. She has similarly applied her practical experience and legal knowledge in drafting and revising numerous District Board policies, City personnel rules and policies, and various employee handbooks.

To further educate clients regarding many of these issues, Katy has developed in-depth, customized trainings focused on clients' particular areas of concern or interest, such as effective supervision, understanding disciplinary due process, and challenges of supervising represented employees. In addition to these trainings, Katy regularly presents harassment prevention training for supervisors, general employees, and elected officials. She has also created and providing training for supervisors and employees regarding newly-adopted policies and procedures in connection with comprehensive updates to employee handbooks and other personnel documents.

Katy also has significant experience with labor negotiations and disputes. She currently serves as lead negotiator for the cities of Carmel-by-the-Sea, Temple City, Duarte, Lawndale, and

Rosemead, and legal counsel at the table for the South East Area Animal Control Authority and City of Alhambra. In addition, she provides labor negotiations advice to numerous public agencies, including drafting and revising employer-employee relations resolutions and memoranda of understanding, analyzing scope of bargaining issues, reviewing and revising proposals and draft responses, and strategizing regarding related legal issues.

Katy is also a member and certificate holder of the Association of Workplace Investigators and regularly serves as a neutral workplace investigator and fact-finder. She has both conducted and overseen numerous workplace investigations. She has also represented public agencies in internal disciplinary disputes as well before external administrative bodies, including PERB, DLSE, DFEH, and EEOC. Each experience underscores the importance of well-drafted and clearly-communicated policies and other written expectations to successful defense of public employers in such matters.

N. Richard Shreiba

Richard Shreiba is an associate in Burke's Orange County office and provides advice and representation to public and private clients on labor and employment matters. Richard has worked at Burke since September 2020. He is experienced in providing employers with advice and counsel services, as well as representing employers throughout the various stages of litigation in both state and federal courts.

Richard's experience includes assisting employers throughout the employee discipline process, preparing workplace policies and handbooks, advising employers with leave related issues, and guiding employers throughout the interactive process for workplace disability accommodations.

Richard has assisted multiple public agencies in revising their Personnel Rules and Regulations to ensure compliance with the ever rapidly changing California public sector employment law landscape. Richard draws on his past litigation experience to avoid common employer pitfalls when drafting and implementing Personnel Rules for clients. As discussed further below, Richard has recently taken a substantial role in a team project led by Katy to create and provide regular updates to a model employee handbook/personnel rule template and related personnel policies for the 100+ public agency members of the California Joint Powers Insurance Authority.

QUALIFICATIONS

Members of Burke's Labor and Employment Law Practice Group understand the unique and constant challenges facing public entity employers in our state. Burke's public sector labor and employment experience includes every aspect of representation of public agencies.

A primary focus of Burke's labor and employment practice is on providing advice and counsel to public agencies in all types of personnel issues, and Burke is well-known for the preventive advice it provides in California's complex employment environment. Burke's attorneys have significant experience assisting employers to manage the difficult employee issues with the goal of minimizing exposure and risk of litigation. Our attorneys work with our clients to establish a legally-compliant workplace that not only provides a defense in employment law disputes, but also provides for a positive and proactive workplace. We are familiar with and regularly advise

public agencies on the administration of complicated leaves of absence (including FMLA/CFRA/PDL leaves), disability and reasonable accommodation under the FEHA and ADA, wage and hour under the FLSA and relevant California laws, pension and healthcare matters, hiring processes and procedures, effective performance evaluations, employee discipline, and other complicated personnel issues that regularly arise in the employment context.

We regularly collaborate with employers to identify and mitigate potential risks with proposed employment actions to provide the employer with the best possible chance of success if such actions are appealed or challenged in litigation.

Our team is very familiar with harassment, discrimination, and retaliation claims that arise under the FEHA and other workplace laws. We regularly serve as workplace investigators of these claims. We also frequently advise Human Resources staff on conducting internal investigations, and assist in overseeing outside investigators. In addition, our experience includes handling all aspects of unique claims that public employers can face, including civil rights claims and First Amendment claims.

Experience

Burke's labor and employment attorneys are recognized statewide for their expertise in drafting, auditing, and updating personnel rules and regulations and administrative policies. We know how critical it is for employers to have up-to-date employee policies and procedures and clearly written provisions to promote positive and transparent employee relations and help ensure compliance with a myriad of state and federal employment laws.

For every facet of employment policies and procedures, from merit-based hiring systems to leaves of absence, we have the benefit of being able to rely on many of the most experienced attorneys in their field. Our attorneys regularly advise clients on employment-related documents, policies and procedures that reinforce an employer's expectations and guidelines to ensure they are in compliance with the various applicable state and federal laws, including among others:

- Fair Employment & Housing Act
- Title VII
- California wage and hour laws and regulations
- Fair Labor Standard Act
- Americans with Disabilities Act
- Age Discrimination in Employment Act
- Family and Medical Leave Act
- California Family Rights Act
- Constitutional and statutory privacy requirements
- Public Safety Officers Procedural Bill of Rights Act
- Firefighters Procedural Bill of Rights Act
- Retaliation
- Substance abuse and testing
- Occupational Safety and Health Act
- USERRA
- Whistleblower claims
- Conflicts of interest
- Grievance procedures

- False claims
- California Public Employees' Retirement Law
- Public Employees' Pension Reform Act
- Meyers-Milias-Brown Act
- First Amendment retaliation
- Employee discipline and due process
- The Equal Pay Act
- Compensation and benefits
- Wrongful termination/discharge

With the enactment of new laws and other continual changes to legal authorities governing public employers, employment law becomes more challenging and complicated every year. This has been the case in particular, during the ongoing pandemic caused by Covid-19. Burke continually monitors new developments in employment law to ensure that our expertise and knowledge are timely and up-to-date. Similarly, to help public agencies keep up-to-date on the constantly evolving laws, we also publish Legal Trends, an annual compendium of key public sector labor and employment cases that serves as a resource tool for attorneys, clients, and other human resources professionals throughout the state.

In recognition of the dynamic nature of employment laws and practices, Burke's employment attorneys routinely draft and update employee handbooks, personnel rules, regulations and policies for a number of agencies to help to ensure that provisions are both legally compliant and clearly communicated. Our proposed team members have provided such services in the last few years to several municipalities, including the cities of Alhambra, Buellton, Piedmont, Pacifica, Rolling Hills Estates, and Temple City, and to a number of special districts including Irvine Ranch Water District, Bear Valley, Community Services District, Rancho Simi Recreation and Parks District, and Jurupa Area Recreation and Parks District, as well as our current project for the California Joint Powers Insurance Authority. Following the chart of Recent or Current Projects below, we provide further detail regarding the recent or current projects for three of these agencies: Irvine Ranch Water District, Bear Valley Community Services District, and the California Joint Powers Insurance Authority ("CJPIA.")

Recent or Current Projects

Agency	Handbook/Policy
Alameda Corridor East Construction Authority	Employee Handbook
Bear Valley Community Services District	Personnel Rules and Regulations
City of Alhambra	Personnel Rules and Regulations, Police Department Manual (Personnel Rules), Firefighter Bill of Rights Appeals (Municipal Code and Civil Service Commission Rules), Fire Department Manual (Personnel Rules), Employer-Employee Relations Resolution and Related Policies, Covid-19 Policies
City of Atascadero	Personnel Rules and Related Policies
City of Bishop	Personnel Rules and Related Policies

Agency	Handbook/Policy
City of Camarillo	Personnel Rules and Related Policies
City of Duarte	Personnel Rules and Related Policies; Part-Time Employee Handbook
City of Healdsburg	Personnel Rules and Related Policies
City of Hemet	Personnel Rules and Related Policies
City of Lynwood	Timekeeping and Leave Policies
City of Moorpark	Personnel Rules
City of Moreno Valley	Harassment Prevention Policy
City of Morro Bay	Harassment Prevention Policy
City of Pacifica	Personnel Rules and Related Policies
City of Palmdale	Personnel Rules and Related Policies; Employer-Employee Relations Resolution
City of Patterson	Personnel Rules
City of Piedmont	Personnel Rules and Related Policies; Vaccine Mandate Policy, Covid -19 Leave Policies
City of Placentia	FMLA/CRFA/PDL Policy
City of Port Hueneme	Drug-free Workplace Policy
City of Rohnert Park	Drug-free Workplace Policy
City of Rolling Hills Estates	Personnel Rules and Related Policies
City of San Buenaventura	Policy Prohibiting Harassment, Discrimination, and Retaliation
City of Santa Clarita	Personnel Rules and Related Policies
City of Santa Cruz	Harassment Prevention Policy; Background Check Policy
City of Santa Paula	Personnel Rules and Related Policies
City of Seaside	Policy Prohibiting Harassment, Discrimination and Retaliation; Criminal Conviction and Background Checks Policy
City of Stanton	Personnel Rules and Related Policies
City of St. Helena	Personnel Rules and Related Policies
City of Temple City	Personnel Rules and Related Policies, Part-time Employee Handbook
City of Wildomar	Personnel Rules and Related Policies
CJPIA (Model policies and personnel rule templates for member agencies)	Model Social Media Policy, Model Reasonable Accommodation and Interactive Process Policy; Model Drug-Free Workplace Policy; Model Criminal Convictions and Background Check Policy; Model Prevention of Harassment, Discrimination and Retaliation Policy; Model FMLA/CFRA/PDL Policy; Model Social Media Policy; current project developing personnel rule templates for 100+ member agencies
CJPIA (internal policies)	Harassment Prevention Policy, FMLA/CFRA/PDL Policy

Agency	Handbook/Policy
Friant Water Authority	Personnel Rules and Related Policies
Irvine Ranch Water District	Comprehensive Update of District Board Personnel Policies
Jurupa Area Recreation and Parks District	Personnel Manual Revision
Rancho Simi Recreation and Parks District	Sick Leave, Workplace Violence Prevention, Employer Employee Relations Resolution
Santa Cruz Port District	Personnel Rules and Related Policies
San Mateo County Mosquito & Vector Control District	Board Policies and Employee Manuals
Sausalito-Marín City Sanitary District	Personnel Rules
Sonoma County Library	Harassment Prevention Policy
Sunline Transit Agency	Employee Handbook

Irvine Ranch Water District: Burke worked with the then-HR Director, Jenny Roney and her HR staff to complete a comprehensive review and update of District Board policies pertaining to a broad range of personnel topics. Approximate total for the project was \$100,000.00.

Bear Valley Community Services District: Burke provided guidance and legal support to the District in its initial preparation of a draft employment policy manual and worked with HR Director/Assistant to the General Manager, Kristy McEwen, and the General Manager, Bill Malinen, to tailor the policies to the District’s particular needs and prepare a final comprehensive draft for Board approval. Approximate total for the project was \$25,000.00.

CJPIA: Burke’s team is currently preparing a model employee handbook/personnel rules template for the 100+ member agencies of the CJPIA. Each template will be drafted to address legal requirements for most public agency employers. In addition, where relevant, the template will provide guidance (but not legal advice) for modifying terms based on considerations such as agency type and number of employees, among others. Approximate budget for the project is \$80,000.

References

We are proud of our service record with our clients. We encourage you to contact the client references listed below about the merits of Burke, its personnel, and its services.

Client Name and Address	Contact Tel Email
Bear Valley Community Services District 28999 S. Lower Valley Rd Tehachapi, CA 93561	Kristy McEwen HR Director/Assistant to the 661.821.4428 kmcewen@bvcsd.org

Client Name and Address	Contact Tel Email
Irvine Ranch Water District 15600 San Canyon Irvine, CA 92618	Jenny Roney (Retired) Human Resources Director Telephone and email address available on request.
California JPIA 8081 Moody Street La Palma, CA 90623	Alex Mellor Senior Risk Manager 562.631.0814 amellor@cjia.org Kelly Trainer Policky Employment Practices Manager 562.467.8781 ktrainerpolicky@cjia.org

SCOPE OF SERVICES

Through our team’s extensive experience in developing employee handbooks and policies, we have developed a recommended five phase approach. Our process allows us to develop and revise handbooks, rules, and policies, effectively and efficiently. Our proposed methodology to review and revise the District’s Employee Handbook and District Policies, is as follows and takes into account the District’s requested scope of services, including the District’s goal that the existing Employee Handbook and District Policies are simplified, updated for legal compliance, and reflective of best practices. We would, of course, customize the proposed project phases based upon further discussion and direction from the District.

We are committed to providing progress and status reports to the District at every proposed phase of the project and as often as requested. If selected, we will work closely with the District to proceed through each phase below by coordinating with District staff.

Phase 1 – Identify and Assess Workforce

In the initial phase, we would like to schedule an introductory meeting (in person, via Zoom, or over the phone) with VSD Administration staff, to generally evaluate the District’s practices and procedures, and identify any differences among the District’s three Departments. Our goal during this meeting is to identify and assess the District’s workforce and the District’s particular needs and to review project planning, coordination, discuss scope, concerns, outcomes, and expectations.

During this initial phase we will obtain all pertinent VSD documents, such as the current Employee Handbook and District Policies. We will conduct a general review of these VSD documents and aim to identify other related rules and procedures contained in other key

documents, such as the District’s resolutions, any applicable collective bargaining agreements, employment agreements and Department policies.

Phase 2 – Initial Review, Revisions, and Comments

As a second phase, we conduct a detailed review and analysis of the District’s Employee Handbook and District Policies. This detailed review includes:

- Identifying rules that are non-compliant, outdated, do not reflect best practices, or incomplete with respect to legal conformity, and drafting or making recommendations for revised rules;
- Developing or proposing new rules or policies for subjects that appear to be missing;
- Recommending revisions to rules that appear to be ineffective, inaccurate, or otherwise inconsistent with other District policies or current practices and proposing revisions to streamline the Employee Handbook and District Policies ; and
- Highlighting risks associated with maintaining current practices and adopting new practices.

During this phase, we will work closely with the District to gather relevant information and to better understand the District’s current practices and goals. We will also conduct case specific research and analysis regarding specific employment policies for the District’s workforce as needed.

We will prepare a draft written report describing this Employee Handbook review process, methodology, findings, and recommendations.

The revised proposed Employee Handbook and District Policies will be prepared and submitted in draft form and transmitted to appropriate District personnel in both clean and redline versions.

Phase 3 – District’s Review of Employee Handbook and District Policies

During the third phase, we recommend that VSD Administrative staff review the proposed draft Employee Handbook and District Policies. Additionally, we recommend an in-person meeting with VSD Administration, Department Heads and VSD Attorney to discuss recommended changes to the updated draft Employee Handbook and District Policies and any additional changes the District would like to see made. We will also continue to address the District’s questions and preferences as to the proposed draft Employee Handbook and District Policies.

Phase 4 – Final Revisions Following District’s Review

As the fourth phase, we will make any necessary revisions to the Employee Handbook and District Policies following the District’s review and meeting to discuss changes. Upon the District’s request, we can also help identify potential revisions to external documents such as any applicable collective bargaining agreements or Department policies. The Employee Handbook and Policies will be provided in electronic format suitable for ongoing

customization and revision. After the District is satisfied with the final draft of the Employee Handbook and District Policies, the District may need to meet and confer with its represented employee groups over the proposed changes and/or meet with non-represented employees. As experienced labor negotiators, we can provide the District with legal advice and assistance during this process upon the District's request.¹

Phase 5 – Training

As the fifth phase, once the Employee Handbook and District Policies are finalized, we will develop a curriculum for training of supervisors on the updated Employee Handbook and Policies. As part of this curriculum, we will develop a summary of key changes in the updated Employee Handbook and Policies. As experienced trainers, we can provide this training for the District.

¹ Given our substantial experience and expertise as labor negotiators, we are regularly retained to assist with labor negotiations, including labor management committees to negotiate Employee Handbooks and Policies. In that capacity we assist with responding to any miscellaneous District questions about revisions or issues raised by the union(s) and assisting with revisions to Collective Bargaining Agreements following the meet and confer process. Should the District be interested in retaining our services to serve as lead labor negotiator for any recognized groups, or meetings with non-represented employee groups, or to advise the District through the meet and confer process and/or meetings with non-represented employees groups, we are prepared to assist the District and can provide a proposal for such scope of work upon request.

ATTACHMENT A – PROFESSIONAL SUMMARIES



Katy A. Suttorp

Partner

Pronouns: she, her, hers

Orange County

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PRACTICE GROUPS

Education
Labor and Employment
Public

EDUCATION

J.D., University of California, Davis, 2003
B.A., Environmental Sciences, University of California, Berkeley, 1998

ADMISSIONS

State Bar of California
United States District Court for the Central District of California

AFFILIATIONS

Association of Workplace Investigators
Certificate Holder

Katy Suttorp, a partner in the Orange County office of Burke, Williams and Sorensen, LLP, represents and counsels a wide range of employers, including municipalities, special districts, school districts, community college districts, and private entities, in numerous labor and employment law matters. These include disability accommodation and interactive process, employee discipline and due process, leaves and benefits, state and federal wage and hour audits and disputes, wrongful termination, workplace investigations, Firefighters Procedural Bill of Rights Act/Public Safety Officers Procedural Bill of Rights Act, employee speech and privacy, workplace violence, pre-employment and privacy issues, including drug and alcohol testing, HIPAA/California Confidentiality of Medical Information Act, and CalPERS and CalSTRS audits and disputes. In connection with that representation, Katy has drafted and revised a variety of personnel rules and employee handbooks, personnel-related ordinances and resolutions, board policies and administrative regulations, collective bargaining agreements/memoranda of understanding, and employer-employee resolutions/local rules.

To further educate clients regarding many of these issues, Katy has developed in-depth, customized training focused on clients' particular problems and areas of concern, including interactive process and reasonable accommodation, discipline and due process, performance evaluations, and prevention of harassment, discrimination, retaliation, and abusive conduct.

Katy also provides advice and representation for a variety of labor matters, including acting as lead negotiator, representing agencies in proceedings before PERB, and providing workplace training addressing challenges in supervising represented employees.

During law school, Katy clerked at the U.C. Davis office of the Campus Counsel and served as a summer extern for the Honorable Gary A. Feess, a judge of the United States District Court for the Central District of California. She also served as editor-in-chief of the environmental law and policy journal, *Environs*. In recent years, Katy completed a two-year appointment to the Program Review Committee for the American Inns of Court.

INSIGHTS

Presentations

“Negotiation and Effective Documentation of Disciplinary Issues,” ACSA Negotiators’ Symposium, January 24, 2019

“Today’s Reality: People, Politics, and Post-Janus Pressures at the Table” (panel), ACSA Negotiators’ Symposium, January 24, 2019

“Avoiding Past Mistakes and Averting Future Pitfalls: The Importance of Disability and Medical Leave Basics,” ACSA Personnel Institute, October 3, 2018

“Negotiation and Effective Documentation of Disciplinary and Performance Issues,” ACSA Negotiators' Symposium, January 17, 2018

“CalPERS Requirements, Audits, and Related Bargaining Considerations,” ACSA Negotiators' Symposium, January 18, 2018

“Ready or Not – Top 5 Legal Changes Coming for 2018!” Webinar, December 19, 2017

“Choose Your Own Disability Adventure, CALPELRA,” December 8, 2017

“Education is Your Passport to the Future: HR Back to Basics,” CalJPIA Risk Management Educational Forum, October 12, 2017

“Avoiding a Bumpy Landing: Lighting the Approach to an Effective Interactive Process,” ACSA Personnel Institute, October 4, 2017

“Health Insurance Opt-Outs After the Affordable Care Act and Flores v. City of San Gabriel Decision,” County Counsels' Association of California Employment Law Conference, Santa Barbara, November 2016

“Choose Your Own Disability Adventure,” CALPELRA 41st Annual Training Conference, November 3, 2016

“Exploring the Depths of Disability Discrimination,” ACSA Personnel Institute, October 6, 2016

“Preventing Workplace Harassment, Discrimination, Retaliation and Abusive Conduct,” Client Presentation, December 2015

“Staff Training Requirements for Bilingual and English as a Second Language (ESL) Classrooms,” National Business Institute, English Language Learner Law Seminar, December 2015

“Preventing Workplace Harassment, Discrimination, Retaliation, and Abusive Conduct,” Client Presentation, November 2015

“Tap Dancing at Club Obi-Wan: Choreographing the Interactive Process,” California Public Employers Labor Relations Association Annual Training Conference, October 2015

“Diving in the Deep End of Disability Discrimination,” Association of California School Administrators Personnel Institute, October 2015

“Effective Return to Work Programs and the Interactive Process,” California Worker's Compensation & Risk Conference & Expo, September 2015

“Diving in the Deep End of Disability Discrimination,” Los Angeles County Office of Education, Employment Practice Liability Workshop, May 2015

“HR Boot Camp,” County of San Bernardino, April 2015

Publications

“Emergency Family Medical Leave Act: Leave Scenarios,” The Authority, California JPIA Newsletter, Issue 100, June 2020

“Legal Trends,” *Burke, Williams & Sorensen, LLP*, 2008-2018 Editions

“(Nearly) Every Minute Counts for Non-Exempt Employees in California Following the State Supreme Court's Ruling in *Troester v. Starbucks*,” The Authority, CJPIA Newsletter, Issue 79, September 2018

“Clear as Mud Redux: California Leaves of Absence in the Public Sector,” *The Authority*, CJPIA Newsletter, Issue 59, January 2017

"Curiouser and Curiouser: Expansion of the Duty to Reasonably Accommodate Disability," *Burke Employment Law Update*, April 2016

"Body Piercings and Tattoos in the Workplace: Can Employers Place Limits on Them?" *Carl Warren Connects*; Carl Warren, December 2015

"Pocket Guide to Disability Discrimination in the California Workplace," *CPER*, October 2015

"Dress and Grooming Standards for California Public Employers ...It's a Bit More Complicated than You Might Expect," *The Authority*, CJPIA, August 2015

"Significant Changes to the FEHA: Are You Prepared for 2015?" *CALPELRA Alert*, December 2014

"Significant Changes to the FEHA: Are You Prepared for 2015?" *Employment Law Alert*, December 2014

"Healthy Workplaces, Healthy Families Act of 2014: What Does It Mean for Our Agency?" *The Authority*, CJPIA, November 2014

"School Districts Must Provide School-Wide Assessment Data as Part of a Special Education Determination," *Education Law Alert*, October 2014



Monica Sanchez McQueen

Partner

Pronouns: she, her, hers

Los Angeles

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Los Angeles, California 90071

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Monica Sanchez McQueen is a partner in Burke's Los Angeles office, representing public and private sector clients in labor and employment law matters.

Monica has represented and advised employers on matters involving numerous federal and state law claims, including discrimination, harassment, retaliation, wrongful termination, defamation, leaves of absence, whistleblower violations, freedom of speech, and association, privacy, and wage and hour, including collective and class action suits. In addition, Monica's practice includes representation of public employers in areas unique to public employment such as due process, disciplinary procedures, the Meyers-Milias-Brown Act, CalPERS, and the Public Safety Officers Procedural Bill of Rights Act and the Firefighters Procedural Bill of Rights Act.

Monica has an extensive counseling practice, focusing on preventive measures of employment and labor law. In this regard, she has drafted and revised employee handbooks, personnel rules, personnel ordinances, updated specific policies and advised public agencies on the handling of a variety of employment matters. Monica has developed and led comprehensive wage and hour audits analyzing City-wide practices of a broad range of job positions and industries and recommended changes to policies, procedures and collective bargaining agreements to ensure compliance with all aspects of state and federal wage and hour laws. Monica has evaluated and responded to CalPERS' comprehensive pension audit findings of City-wide compensation and reporting practices and developed and implemented policies and procedures to ensure future compliance with CalPERS' rules and regulations.

Monica has represented public agencies in all aspects of labor and has identified issues to bargain, recommended, drafted and responded to proposals, advised lead negotiators and members of bargaining teams, has acted as negotiator for police, fire and miscellaneous unions during labor negotiations, and drafted and oversaw implementation of labor agreements. In addition to labor negotiations, Monica has extensive experience in handling related labor relations matters, such as grievances, PERB proceedings including unfair practices, unit recognition, unit modification, elections, and unit decertification. Monica has negotiated and drafted employment contracts for high-level employees. She also conducts a variety of workplace trainings for managers and employees on matters such as the prevention of discrimination and harassment, workplace violence and working in the public sector.

While attending the University of California, Los Angeles, Monica interned at the United States Department of Education, in the Office of the Secretary, in Washington D.C. While in law school, she was a member of the San Diego Law Review. She was also the secretary for Phi Delta Phi, a legal honor

PRACTICE GROUPS

Education

Labor and Employment

Litigation

EDUCATION

J.D., University of San Diego School of Law, 2004

B.A., University of California, Los Angeles, 2000

ADMISSIONS

State Bar of California

United States District Court for the Central District of California

fraternity, and the Secretary for the Hispanic National Bar Association, Law Student Division. Monica studied at the University of San Diego Institute of International and Comparative Law in Barcelona, Spain and Oxford, England.

RESULTS

- *Alvidres v. City of Alhambra*. Discrimination and harassment based on race, sexual orientation and disability, retaliation, failure to prevent harassment and discrimination. Settled.
- *Toh v. City of Alhambra*. Wrongful termination, retaliation, and race discrimination. Settled.
- *Hatzbanian v. City of Alhambra*. Wrongful termination, retaliation and race discrimination. Settled.
- *Fong v. City of Alhambra*. Civil rights violations and defamation. Settled.
- *Robert Torrance, et al. v. City of Alhambra*. Wage and hour, FLSA collective action. Settled.
- *Lynda Bertino, et al. v. Pro's Choice*. Wage and hour, class action. Settled.
- *Benshop v. City of Alhambra*. Wage and hour, FLSA collective action. Settled.

INSIGHTS

Presentations

"No Employee Left Behind: Evaluating the Evaluations" California Joint Powers Insurance Authority Human Resources Academy, April 19, 2018

"It's Elementary, Dear Watson: Conducting Effective Workplace Investigations" California Joint Powers Insurance Authority Human Resources Academy, April 19, 2018

"Legislative and Case Law Updates" California Joint Powers Insurance Authority Human Resources Academy, April 19, 2018

"Ready or Not – Top 5 Legal Changes Coming for 2018!" Webinar, December 19, 2017

"New Developments for Industrial Disability Retirements," Southern California Public Labor Relations Council, September 21, 2017

"Preventing Workplace Harassment, Discrimination and Retaliation for Supervisory and General Employees," California Joint Powers Insurance Authority – Multiple Presentations, 2006-current

"Working in a Fishbowl: Practical Challenges for Public Sector Employees," California Joint Powers Insurance Authority – Multiple Presentations, 2014-current

"Preventing Workplace Violence," California Joint Powers Insurance Authority – Multiple Presentations, 2013-current

"We the Rude, Angry & Violent People," November 2015

"Wage and Hour Law In the Public Sector," October 2016

"The Unionized Workforce: Labor Relations & The MMBA," September 2016

Publications

"EEOC Issues Guidance Prohibiting Employers From Requiring COVID-19 Antibody Testing," *The Authority*, California JPIA Newsletter, Issue 100, June 2020

Legal Trends, *Burke, Williams & Sorensen, LLP*, Fall 2009-2017 Editions

"Clear as Mud Redux: California Leaves of Absence in the Public Sector," *The Authority*, CJPIA Newsletter, Issue 59, January 2017

“Answers to Common Employer Questions About Transgender Employees,” *The Authority*, CJPIA, May 2016

“Dukes v. Wal-Mart, Inc.: The Ninth Circuit Affirms the Certification of the Largest Class Action in History,” *Labor & Employment Law Update*, June 2010



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Associate

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PRACTICE GROUPS

Labor and Employment

EDUCATION

J.D., *cum laude*, Drexel University Thomas R. Kline School of Law, 2016
B.A., California State University, Fullerton, 2012

ADMISSIONS

State Bar of California
United States District Court for the Central District of California
United States District Court for the Eastern District of California
United States District Court for the Northern District of California
United States District Court for the Southern District of California

AFFILIATIONS

Orange County Bar Association
California Bar Association

RECOGNITIONS

Selected for inclusion in Northern California Super Lawyers – Rising Stars, 2020

Richard Shreiba is an Associate in Burke's Orange County office where he provides advice and representation to public and private clients on labor and employment matters. Richard is experienced in providing employers with advice and counsel services, as well as representing employers throughout the various stages of litigation in both state and federal courts.

Richard's experience includes assisting employers throughout the employee discipline process, preparing workplace policies and handbooks, advising employers with leave related issues, and guiding employers throughout the interactive process for workplace disability accommodations.

Richard litigates in state and federal courts and consistently draws on his litigation experience when providing advice to employers. Richard's litigation experience entails handling the various stages of pre-litigation all the way to jury trial.

Richard has represented public entities at various different levels of government, and private entities that varied from small regional businesses to large national enterprises. Richard is also experienced in representing non-profit clients and draws on his experience providing legal services to the Fresno Economic Opportunities Commission.

During law school, Richard clerked for multiple public entities. Richard's experience and passion for serving public and non-profit entities enables him to provide exceptional service and creative solutions for his clients.

Richard's first career as a manager in the financial services industry enables him to provide employers with practical strategies and creative alternatives to solving employment personnel issues while simultaneously complying with state and federal employment laws.

During his free time, Richard loves to enjoy the outdoors. He enjoys spending time at the beach and hiking state and national parks with his family.

Practice Groups

Construction Law
Education Law
Environmental, Land Use
& Natural Resources
Intellectual Property
Labor & Employment Law
Litigation
Public Law
Real Estate & Business

Locations

Los Angeles
Inland Empire
Marin County
Oakland
Orange County
Palm Desert
San Diego
San Francisco
Silicon Valley
Ventura County

800.333.4297
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burke

BURKE, WILLIAMS & SORENSEN, LLP



Cost Proposal to Provide
Comprehensive Employee
Handbook and Policy Review for

VALLEY SANITARY DISTRICT

Proposed Lead Attorney
Katy A. Suttorp

Burke, Williams & Sorensen, LLP
1851 East First Street, Suite 1550
Santa Ana, California 92705

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Submitted February 8, 2022



COST PROPOSAL

We believe that the rates quoted below are reasonable and competitive.

Hourly Rates

Staffing	Hourly Rate
Partners	\$325
Senior Associate Attorneys	\$295
Associate Attorneys	\$280
Paralegals	\$160

Adjustments

The rates for legal services quoted in this proposal will remain in effect for the first year of the contract. Thereafter, unless otherwise negotiated, rates may be adjusted based on a standard annual adjustment upon consultation with the General Manager and approved by the Board as part of the Board's standard budget adoption process, equal to the greater of the average Consumer Price Index for the previous four quarters or any across the board salary increase granted to management personnel within the District.

Reimbursements

We routinely charge our clients for our direct out-of-pocket expenses and costs incurred in performing the services. These costs and expenses commonly include such items as reproduction of documents, facsimile, mileage reimbursement for travel at the IRS approved rate, and other costs reasonably and necessarily incurred in performing services for the District. We do not charge a service fee or overhead for cost reimbursement items. We also do not charge for computer or word processing time. Reimbursement amounts may be adjusted annually.

Expense	Rate
In-house reproduction charges	
black and white	20¢ per page
color	\$1 per page
Mileage	58.5¢ per mile (or current IRS rate)
Facsimile	\$1 per page

Expense	Rate
All other costs reasonably and necessarily incurred in performing services for the District	at cost

Billing Format and Procedure

Bills are sent out each month invoicing charges for the prior month. Fees for our services are charged in increments of 1/10th of an hour. The bills provide a specific description of the work performed by all attorneys, the time actually spent on the work item, and the billing rate of the attorney. These bills also contain itemized descriptions of any out-of-pocket expenses incurred during the prior month.

Project Schedule

We have developed a recommended five phase approach. We would, of course, customize the proposed project phases based upon further discussion and direction from the District.

Project Phases	Hour Estimate
Phase 1 – Identify and Assess Workforce	15 – 20 Hours
Phase 2 – Initial Review, Revisions and Comments	80-140 Hours
Phase 3 – District’s Review of Employee Handbook and District Policies	15 – 40 Hours
Phase 4 – Final Revisions Following City’s Review	40 – 60 Hours
Phase 5 - Training	15 – 30 Hours
TOTAL	165 – 290 Hours

Based on the above proposal and hours estimate, the total cost estimate for review and revision of the District’s Employee Handbook and District Policies is \$53,625 - \$94,250.¹

¹ This is an estimated budget based on current information available. During this process, as part of our regular check-in meetings with management, we will advise as to any anticipated alterations to this proposed budget, based in large part on our actual review of the District’s current documents.

Practice Groups

Construction Law
Education Law
Environmental, Land Use
& Natural Resources
Intellectual Property
Labor & Employment Law
Litigation
Public Law
Real Estate & Business

Locations

Los Angeles
Inland Empire
Marin County
Oakland
Orange County
Palm Desert
San Diego
San Francisco
Silicon Valley
Ventura County

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burke

BURKE, WILLIAMS & SORENSEN, LLP

List of RFP's Submitted

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RWG LAW

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List of RFP's Submitted

Burke, Williams, & Sorenson, LLP

1851 East First Street

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Santa Ana, CA 92705

Phone: (949) 265-3403

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FIRM	Experience and qualifications of assigned staff (40 points)	References (particularly public agencies) and relevant work performed (80 points)	Firm/entity key personnel assigned to the project (40 points)	Demonstrated ability to competently implement the scope of services (100 points)	Demonstrated understanding of issues raised by District in RFP and completeness in addressing the scope of work (120 points)	Cost for services (20 points)	Total Points
ALESHIRE & WYNDER, LLP	31	50	32	75	85	13	286
BURKE, WILLIAMS, & SORENSEN, LLP	36	76	37	98	108	10	365
RWG LAW	32	62	32	85	95	11	317
SBEMP ATTORNEYS	30	50	28	75	110	17	310



**Valley Sanitary District
Budget & Finance Committee
March 1, 2022**

TO: Budget & Finance Committee
FROM: Jeanette Juarez, Business Services Manager
SUBJECT: Update on the Reclaimed Water Project Phase 1 Design-Build Financing Progress

<input type="checkbox"/> Board Action	<input type="checkbox"/> New Budget Approval	<input type="checkbox"/> Contract Award
<input checked="" type="checkbox"/> Board Information	<input type="checkbox"/> Existing FY Approved Budget	<input type="checkbox"/> Closed Session

Executive Summary

The purpose of this report is to provide information regarding the Reclaimed Water Project Phase 1 Design-Build financing progress.

Strategic Plan Compliance

This item complies with VSD strategic plan Objective 5.1: Align long-term financial planning with strategic priorities

Fiscal Impact

Estimated Financing Request \$77 million.

Background

On February 15, 2022, staff met with Schneider electric to review the scope of work, construction phasing, scheduling, and the proposed guaranteed max price. The information was submitted to Bank of America, and they are now working on a financing proposal. Schneider electric is present to provide an update and answer clarifying questions.

Recommendation

Staff recommends that the Budget & Finance Committee receive and file this report for information.

Attachments

None.