

**AGENDA
IRVINE RANCH WATER DISTRICT
BOARD OF DIRECTORS
REGULAR MEETING**

June 13, 2022

CALL TO ORDER 5:00 p.m.

ROLL CALL Directors Reinhart, Withers, Swan, McLaughlin, and President LaMar

This meeting will be held in-person at the District’s headquarters located at 15600 Sand Canyon Avenue, Irvine, California. The meeting will also be broadcasted via Webex for those wanting to observe the meeting virtually.

To observe this meeting virtually, please join online using the link and information below:

Via Web: <https://irwd.webex.com/irwd/j.php?MTID=m1eb25b1d6bd8ef848ca99e0f48643c08>

Meeting Number (Access Code): 2486 585 8778

Meeting Password: 7M8CeSfyhj8

PLEASE NOTE: Webex observers of the meeting will be placed into the Webex lobby when the Board enters closed session. Participants who remain in the “lobby” will automatically be returned to the open session of the Board once the closed session has concluded. Observers joining the meeting while the Board is in closed session will receive a notice that the meeting has been locked. They will be able to observe the meeting once the closed session has concluded.

PUBLIC COMMENT NOTICE

Public comments are limited to three minutes per speaker on each subject. If you wish to address the Board of Directors on any item, you may attend the meeting in person and submit a “speaker slip” to the Secretary. Forms are provided outside of IRWD’s Board Room. If attending via Webex, please submit your request to speak, or your comment, via the “chat” feature and your remarks will be read into the record at the meeting. You may also submit a public comment in advance of the meeting by emailing comments@irwd.com before 12:00 p.m. on Monday, June 13, 2022.

COMMUNICATIONS TO THE BOARD

1. A. Written:
2. B. Oral:
3. ITEMS RECEIVED TOO LATE TO BE AGENDIZED

Recommendation: Determine the need to discuss and/or take immediate action on item(s).

WORKSHOP

4. MID-CYCLE OPERATING AND NON-OPERATING REVIEW THROUGH FISCAL YEAR 2022-23

Recommendation: Staff will review the mid-cycle Operating and Non-Operating Budget through Fiscal Year 2022-23.

CONSENT CALENDAR, ITEMS 5-11

5. BOARD MEETING MINUTES

Recommendation: That the minutes of the May 23, 2022 Regular Board meeting be approved as presented.

6. RATIFY/APPROVE BOARD OF DIRECTORS' ATTENDANCE AT MEETINGS AND EVENTS IN 2022

Recommendation: That the Board ratify/approve the events for Steven LaMar, Douglas Reinhart, Peer Swan, and John Withers, as described.

7. 2022 LEGISLATIVE AND REGULATORY UPDATE

Recommendation: Receive and file.

8. ADOPTION OF REVISED IRWD SCHEDULE OF POSITIONS AND SALARY RATE RANGES FOR FISCAL YEAR 2022-23

Recommendation: That the Board approve the revised Salary Grade Schedule and adopt a resolution superseding Resolution N. 2022-8 and adopting a revised Schedule of Positions and Salary Rate Ranges for the General Unit, Non-exempt Supervisor Unit, and for Managers, Exempt Supervisors, Confidential and Exempt Employees.

Reso. No. 2022-9

9. LUMP SUM PAYMENT OPTION FOR EMPLOYER CONTRIBUTIONS FOR FISCAL YEAR 2022-23 TO THE CALIFORNIA PUBLIC EMPLOYEES' RETIREMENT SYSTEM

Recommendation: That the Board approve the lump sum payment for employer contributions to the California Public Employees' Retirement System by making a one-time contribution of \$7,828,346 for IRWD's Fiscal Year 2022-23 employer Unfunded Accrued Liability contribution.

CONSENT CALENDAR, ITEMS 5-11, continued

10. IRVINE BUSINESS COMPLEX APPURTENANCE RELOCATIONS
CONSTRUCTION AWARD

Recommendation: That the Board authorize the addition of Project 12053 to the Fiscal Year 2021-22 Capital Budget in the amount of \$908,000 and authorize the General Manager to execute a construction contract with T.E. Roberts, Inc. in the amount of \$557,303 for the Irvine Business Complex Appurtenance Relocations, Project 12053.

11. REHABILITATION OF DYER ROAD WELLFIELD WELLS 1, 11, AND 13
FINAL ACCEPTANCE

Recommendation: That the Board accept construction of the Rehabilitation of Dyer Road Wellfield Wells 1, 11, and 13, authorize the General Manager to file a Notice of Completion, and authorize the payment of retention 35 days after recording the Notice of Completion for Projects 07092, 07088, and 10098.

ACTION CALENDAR

12. IRWD GUIDING PRINCIPLES SCORECARD

Recommendation: That the Board provide feedback on the proposed IRWD Guiding Principles Scorecard.

13. IRWD 2022 ANNUAL WATER SUPPLY AND DEMAND ASSESSMENT

Recommendation: That the Board approve IRWD's 2022 Annual Water Supply and Demand Assessment for submittal to the Department of Water Resources prior to the July 1, 2022, deadline.

14. IRWD CUSTOMER ENGAGEMENT AND ANALYTICS PROGRAM

Recommendation: That the Board authorize the General Manager to execute a Professional Services Agreement with WaterSmart to provide Customer Engagement and Analytics Program software and services for Fiscal Year 2022-23 in the amount of \$191,101, with an option to extend this agreement annually for up to five years with a 3% annual escalator for a total potential cost of \$1,014,600 over the five years.

ACTION CALENDAR, continued

15. FUNDING FOR EXPANSION OF IRWD'S TURF REBATE AND LANDSCAPE TUNE-UP PROGRAMS


Recommendation: That the Board authorize additional funding in the amount of \$1,000,000 for IRWD's Turf Rebate Program and \$131,000 for IRWD's Landscape Tune-up Program and approve Variance No. 3 with Conserv Construction Inc. in the amount of \$131,000.

OTHER BUSINESS

Pursuant to Government Code Section 54954.2, members of the Board of Directors or staff may ask questions for clarification, make brief announcements, and make brief reports on his/her own activities. The Board or a Board member may provide a reference to staff or other resources for factual information, request staff to report back at a subsequent meeting concerning any matter, or direct staff to place a matter of business on a future agenda. Such matters may be brought up under the General Manager's Report or Directors' Comments.

- 16. General Manager's Report
- 17. Receive oral update(s) from District liaison(s) regarding communities within IRWD's service area and provide information on relevant community events.
- 18. Directors' Comments
- 19. Adjournment

Availability of agenda materials: Agenda exhibits and other writings that are disclosable public records distributed to all or a majority of the members of the above-named Board in connection with a matter subject to discussion or consideration at an open meeting of the Board are available for public inspection in the District's office, 15600 Sand Canyon Avenue, Irvine, California ("District Office"). If such writings are distributed to members of the Board less than 72 hours prior to the meeting, they will be available from the District Secretary of the District Office at the same time as they are distributed to Board Members, except that if such writings are distributed one hour prior to, or during, the meeting, they will be available electronically via the Webex meeting noted. Upon request, the District will provide for written agenda materials in appropriate alternative formats, and reasonable disability-related modification or accommodation to enable individuals with disabilities to participate in and provide comments at public meetings. Please submit a request, including your name, phone number and/or email address, and a description of the modification, accommodation, or alternative format requested at least two days before the meeting. Requests should be emailed to comments@irwd.com. Requests made by mail must be received at least two days before the meeting. Requests will be granted whenever possible and resolved in favor of accessibility.

June 13, 2022
Prepared by: D. Pardee / C. Smithson
Submitted by: C. Clary
Approved by: Paul A. Cook 

BOARD WORKSHOP

MID-CYCLE OPERATING AND NON-OPERATING BUDGET UPDATE THROUGH
FISCAL YEAR 2022-23

SUMMARY:

Two-year operating and non-operating budgets for Fiscal Year (FY) 2021-22 and FY 2022-23 were approved by the Board in April 2021, and rates based on cost-of-service through June 30, 2023, was adopted by the Board on January 24, 2022. Staff has conducted a detailed review of the second year of the two-year approved budgets for FY 2022-23 and will review the mid-cycle operating and non-operating budgets in a PowerPoint presentation, provided as Exhibit “A”.

BACKGROUND:

On April 26, 2021, the Board approved a two-year operating budget that included expenditures totaling \$180.2 million for FY 2021-22 and \$187.7 million for FY 2022-23. The Board also approved a two-year non-operating budget with net income totaling \$76.7 million for FY 2021-22 and \$84.1 million for FY 2022-23. The Board approved rate increases on January 24, 2022 to provide for cost-of-service equity for both fiscal years of the operating budget.

Staff has conducted a detailed mid-cycle review of the approved operating and non-operating budgets for FY 2022-23. Forecasted variances are summarized in a PowerPoint presentation, provided as Exhibit “A”. Staff recommends use of the Rate Stabilization Fund to cover any shortfall in operating expenses.

FY 2022-23 Operating Budget:

Forecasted variances resulting from changes in expense assumptions for FY 2022-23 are shown below. Pass-through costs included in the expense changes are \$1.0 million. Additional details will be provided in the PowerPoint presentation. Below is a summary of the net forecasted changes:

Forecast Variances from Approved Operating Budgets	
Net Income (millions)	FY 2022-23
Forecasted Revenue Variance	\$ -
Forecasted Expense Variance	(6.0)
Forecasted Change in Net Income	\$ (6.0)

Rates through FY 2022-23:

Changes to IRWD's rates and charges were publicly noticed by mail as required under Proposition 218. The Board approved rate increases to provide cost-of-service equity for FY 2021-22 and FY 2022-23 on January 24, 2022. These rates took effect on February 1, 2022. The Board also approved rates associated with the Water Shortage Contingency Plan (WSCP). These rates require additional Board action prior to implementation.

Proposition 218 rules allow for recalculation of rates to include pass-through costs. Rates may be increased with notification of at least 30 days and without a public hearing or any additional action by the IRWD Board of Directors. A review of current rates and recalculated rates with allowable pass-through costs will be presented in the PowerPoint presentation. Staff's recommendation is that any additional costs not previously included in rates be covered by the Rate Stabilization Fund instead of user rates.

FY 2022-23 Non-operating Budget:

Forecasted variances resulting from changes in revenue and expense assumptions for FY 2022-23 are shown below:

Forecast Variances from Approved Non-Operating Budgets	
Net Income (millions)	FY 2022-23
Forecasted Revenue Variance	\$ 17.3
Forecasted Expense Variance	(3.7)
Projected Change in Net Income	\$13.6

Replacement Fund:

The Replacement fund would be impacted by any shortfall or excess income due to forecasted changes in the operating and non-operating budget. The estimated impact of the operating variance is a shortfall of \$6.0 million. This is offset by a portion of the projected increase in Net Non-Operating Income. The anticipated forecast is expected to result in an estimated Replacement Fund balance of \$360 million at the end of FY 2022-23.

FISCAL IMPACTS:

Fiscal impacts are outlined above and are included in the exhibit provided.

ENVIRONMENTAL COMPLIANCE:

This item is not a project as defined in the California Environmental Quality Act Code of Regulations, Title 14, Chapter 3, Section 15378.

Board Workshop: Mid-Cycle Operating and Non-Operating Budget Update for Fiscal Year
2022-23
June 13, 2022
Page 3

COMMITTEE STATUS:

This item was reviewed by the Finance and Personnel Committee on June 7, 2022.

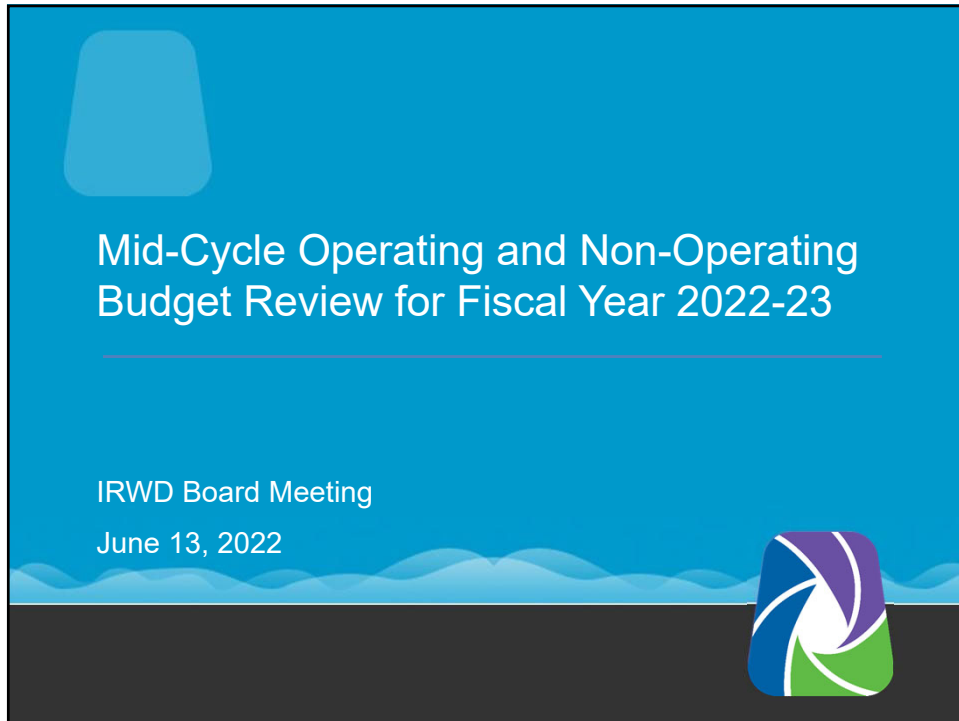
RECOMMENDATION:

RECEIVE AND FILE.

LIST OF EXHIBITS:

Exhibit "A" – Mid-Cycle Operating Budgets and Rates for FY 2022-23 PowerPoint Presentation

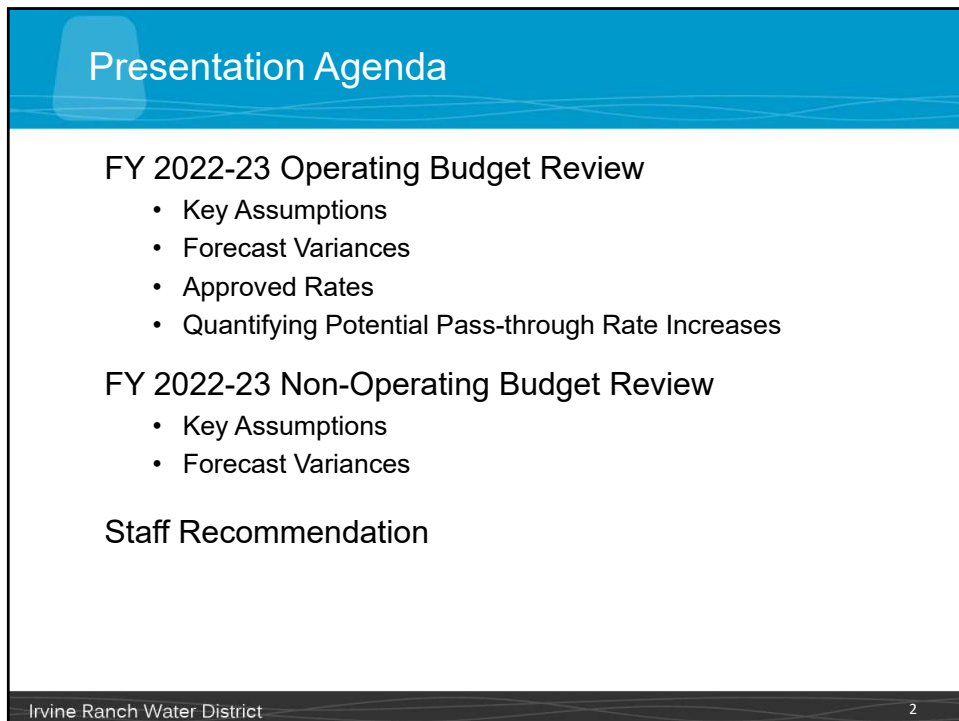
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Mid-Cycle Operating and Non-Operating
Budget Review for Fiscal Year 2022-23

IRWD Board Meeting
June 13, 2022

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Presentation Agenda

FY 2022-23 Operating Budget Review

- Key Assumptions
- Forecast Variances
- Approved Rates
- Quantifying Potential Pass-through Rate Increases

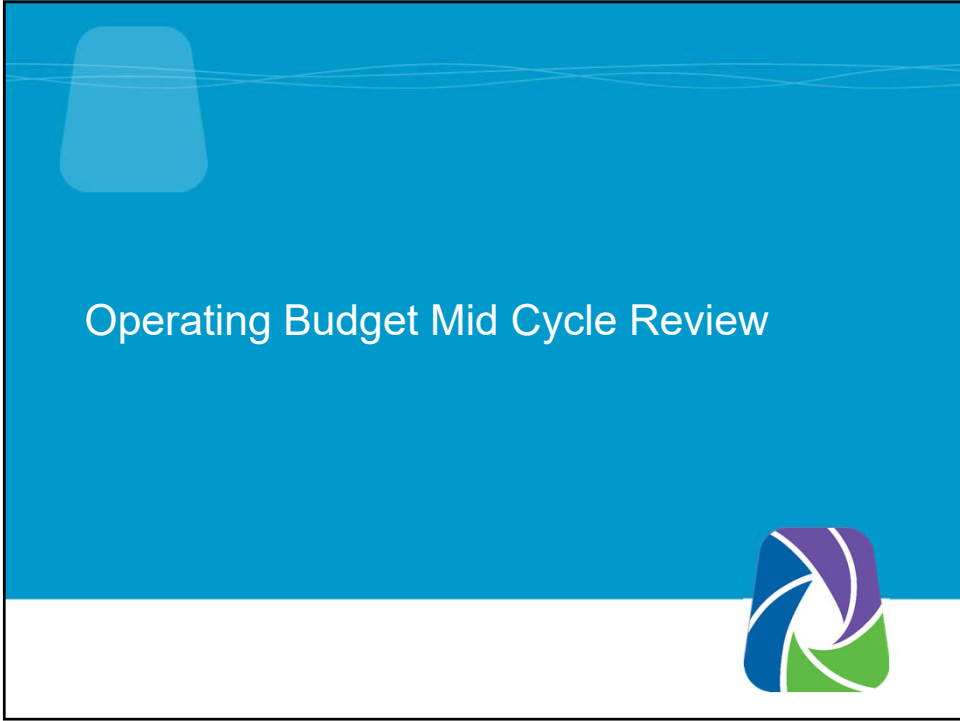
FY 2022-23 Non-Operating Budget Review

- Key Assumptions
- Forecast Variances

Staff Recommendation

Irvine Ranch Water District 2

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Operating Budgets – Key Assumptions

Uncontrollable (Pass Through) Cost Escalators			
Assumptions	FY 21-22	FY 22-23	FY 22-23 Updated
OCWD RA rate/AF	\$509	\$540	\$544
MWDOC potable rate /AF (effective January 1)	\$1,124	\$1,166	\$1,176
MWDOC non-potable rate /AF (effective January 1)	\$790	\$817	\$827
MWDOC Meter Surcharge (per meter)	\$13.00	\$13.39	\$13.75
SCE Electricity rate increase	5.0%	5.0%	8.0%

Irvine Ranch Water District 4

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Other Operating Budget Key Assumptions

Approved Budget FY 2022-23*	Updated Assumptions FY 2022-23
Labor:	
Cost of living (COLA) at 3%	COLA at 7.9%
Headcount - 1 new position	Headcount - 7 new positions
Vacancies at 5% and filled at midpoint of salary range	Vacancies at 8% offset by some positions filled above mid-point
Operations:	
Native water usage = 2000 AF	Native water usage = 1250 AF
Untreated imported water usage = 2250 AF	Untreated imported water usage = 3000 AF
No water banking transfers	Revenue and costs related to banked water transferred to Dudley Ridge Water Service

*Budget assumes recycled water to be included in BPP calculation, resulting in no BEA.

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Operating Budget Forecast Variance

Changes from Updated Assumptions (in millions)*	FY 2022-23
MWDOC Rates	\$ 0.2
RA	0.2
Southern California Edison	0.6
Total Pass-Through Costs	\$ 1.0
Higher COLA increases	2.1
Unbudgeted positions and promotions/new hire salaries over midpoint	1.1
Increase in untreated imported water due to lower use of native water	0.4
Banked Water Operating Expenses	0.6
Projects delayed from FY 2021-22 until FY 2022-23	0.3
All Other	0.5
Total Other Costs	\$ 5.0
Total Expense Forecast Variance	\$ 6.0

* Increased expense / (reduced expense)

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Operating Budgets Variances

Forecast Variances from Approved Operating Budget

(in millions)

Net Income	FY 2022-23
Forecasted Revenue Variance	\$ -
Forecasted Expense Variance	(6.0)
Projected Change in Net Income	\$ (6.0)
Use of Rate Stabilization Fund	\$ 6.0

Irvine Ranch Water District

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Review of Approved Rates



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Approved Rates FY 2022-23

Water Rates per CCF

Tiers	Potable	Recycled
Low Volume	\$1.53	\$1.23
Base	\$2.42	\$2.16
Inefficient	\$5.15	\$4.03
Wasteful	\$14.64	\$7.20
Monthly Water Service Rate* \$10.75		

*Typical Customer with 5/8" meter

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Approved Rates FY 2022-23

Sewer Rates

Usage	Monthly Sewer Service Rate
Average water usage exceeds 10 ccfs per month	\$29.75
Average water usage falls between 5 and 10 ccfs	\$25.50
Average water usage falls below 5 ccfs	\$20.45
Commercial, Industrial, & Public Authority	
Quantity Service Charge (beyond 10 ccf)	\$2.19/ccf
Industrial Waster Service Charge (if applicable)	\$0.107/ccf

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Typical Residential Customer Bill FY 2022-23

Current Residential Rates:	Water	Sewer
Low Volume	\$1.53	
Commodity Rate	\$2.42	
Operations	\$7.97	\$12.12
Replacements	\$2.08	\$7.65
Enhancements	\$0.70	\$0.68
Total Service Charge	\$10.75	\$20.45
Commodity (12ccf's)	\$24.59	
Current Monthly*	\$55.79	

*8.9% rate increase effective February 1, 2022

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Quantifying Potential Pass-Through Rate Increases



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Quantifying Potential Pass-Through Rate Increases

Potable Water Rates

Tiers	Current Rate (ccf)	Pass-Through Rate (ccf)	Difference (\$)
Low Volume	\$1.53	\$1.55	\$0.02
Base	\$2.42	\$2.45	\$0.03
Inefficient	\$5.15	\$5.19	\$0.04
Wasteful	\$14.64	\$14.68	\$0.04

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Quantifying Potential Pass-Through Rate Increases

Recycled Water Rates

Tiers	Current Rate (ccf)	Pass-Through Rate (ccf)	Difference (\$)
Low Volume	\$1.23	\$1.26	\$0.03
Base	\$2.16	\$2.19	\$0.03
Inefficient	\$4.03	\$4.06	\$0.03
Wasteful	\$7.20	\$7.23	\$0.03

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Typical Residential Customer Bill FY 2022-23

Current Residential Rates:	Water	Sewer
Low Volume	\$1.53	
Commodity Rate	\$2.42	
Operations	\$7.97	\$12.12
Replacements	\$2.08	\$7.65
Enhancements	\$0.70	\$0.68
Total Service Charge	\$10.75	\$20.45
Commodity (12ccfs)	\$24.59	
Current Monthly	\$55.79	
Potential Pass-Through Residential Rate Adjustment:		
Low Volume	\$1.55	
Base Commodity Rate	\$2.45	
Operations	\$7.97	\$12.12
Replacements	\$2.08	\$7.65
Enhancements	\$0.70	\$0.68
Total Service Charge	\$10.75	\$20.45
Commodity	\$24.90	
Proposed Monthly	\$56.10	
Current Monthly	\$55.79	
Difference	\$0.31	
Change %	0.6%	

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Operating Budgets Variances

Variances from Approved Operating Budget with Pass-Through Revenue


(in millions)

Net Income	FY 2022-23
Forecasted Revenue Variance	\$ 1.0
Forecasted Expense Variance	(6.0)
Projected Change in Net Income	\$ (5.0)
Use of Rate Stabilization Fund	\$ 5.0

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Non-Operating Budget



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Key Assumptions

Non-Operating Budget			
	FY 21-22	FY 22-23	FY 22-23 Updated
Assessed Value Growth (tax revenue)	3.40%	2.80%	3.10%
Investment Income Rate	0.55%	0.70%	1.88%
Real Estate Income Growth	2.00%	2.00%	2.50%
Interest Expense (variable rate)	0.15%	0.40%	1.63%
Real Estate Expense Growth	2.00%	2.00%	2.50%

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Non-Operating Budgets Variances

Forecast Variances from Approved Non-Operating Budgets

(in millions)

Net Income	FY 2022-23
Forecasted Revenue Variance	\$ 17.3
Forecasted Expense Variance	(3.7)
Projected Increase in Net Income	\$13.6

Irvine Ranch Water District

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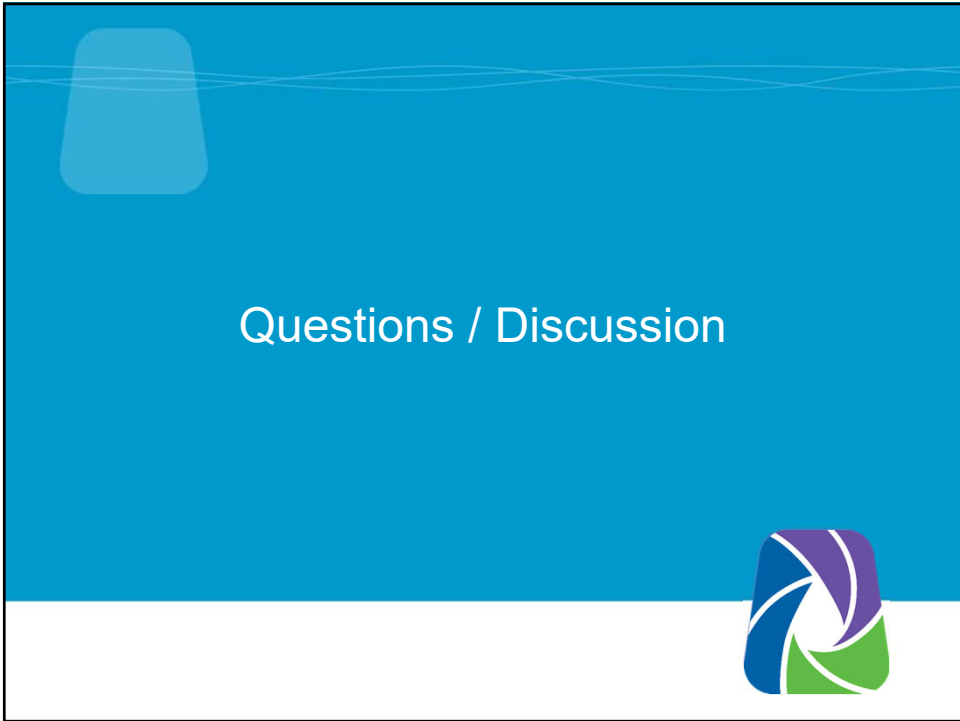
Staff Recommendation

Receive and File.

Irvine Ranch Water District

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June 13, 2022
Prepared and
submitted by: L. Bonkowski
Approved by: Paul A. Cook *PAC*

CONSENT CALENDAR

BOARD MEETING MINUTES

SUMMARY:

Provided are the minutes of the May 23, 2022 Regular Board meeting for approval.

FISCAL IMPACTS:

None.

ENVIRONMENTAL COMPLIANCE:

Not applicable.

COMMITTEE STATUS:

Not applicable.

RECOMMENDATION:

THAT THE MINUTES OF THE MAY 23, 2022 REGULAR BOARD MEETING BE APPROVED AS PRESENTED.

LIST OF EXHIBITS:

Exhibit "A" – May 23, 2022 Minutes

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EXHIBIT “A”

MINUTES OF REGULAR MEETING –MAY 23, 2022

The regular meeting of the Board of Directors of the Irvine Ranch Water District (IRWD) was called to order at 5:00 p.m. by President LaMar on May 23, 2022 at the District offices, 15600 Sand Canyon Avenue, Irvine.

Directors Present: Swan, Reinhart, and McLaughlin. and LaMar.

Directors Absent: Withers.

Written and Oral Communications: None.

Also Present: General Manager Cook, Executive Director of Technical Services Burton, Executive Director of Operations Chambers, Executive Director of Finance and Administration Clary, Executive Director of Water Policy Weghorst, Director of Treasury and Risk Management Jacobson, Director of Recycling Operations Zepeda, Director of Water Resources Sanchez, Director of Human Resources Mitcham, Director of Strategic Communications and Advocacy / Deputy General Counsel Compton, Acting Director of Maintenance Manning, Director of Safety and Security Choi, Director of Information Services Kaneshiro, Director of Water Quality and Regulatory Compliance Colston, Secretary Bonkowski, Assistant Secretary Swan, General Counsel Collins, Consultant Newell, Manager of Field Services Baretto, Mr. Scott Lynch of WateReuse Association, Mr. Nearhoof and Mr. Feuerstein of UC Irvine, and members of the public and other staff.

PRESENTATIONS

WATEREUSE ASSOCIATION’S EXCELLENCE IN ACTION AWARD PRESENTED TO THE UNIVERSITY OF CALIFORNIA, IRVINE AND IRVINE RANCH WATER DISTRICT

Mr. Scott Lynch, President of the Orange County Chapter of WateReuse presented to the Board and UCI’s Jerry Nearhoof an “Excellence in Action” award for its partnership project with the University of California Irvine to convert its Central Plant cooling towers to recycled water.

CONSENT CALENDAR

On MOTION by Reinhart, seconded by McLaughlin, and unanimously carried, CONSENT CALENDAR ITEMS 5 THROUGH 10 WERE APPROVED AS FOLLOWS:

5. BOARD MEETING MINUTES

Recommendation: That the minutes of the May 9, 2022 Regular Board meeting be approved as presented.

6. RATIFY/APPROVE BOARD OF DIRECTORS’ ATTENDANCE AT MEETINGS AND EVENTS IN 2022

Recommendation: That the Board ratify/approve the events for Steven Lamar, Douglas Reinhart, Peer Swan, and John Withers, as described.

CONSENT CALENDAR (CONTINUED)

7. APRIL 2022 TREASURY REPORTS

Recommendation: That the Board receive and file the Treasurer's Investment Summary Report, the Summary of Fixed and Variable Rate Debt, and Disclosure Report of Reimbursements to Board members and staff, approve the April 2022 summary of payroll ACH payments in the total amount of \$2,172,565, and approve the April 2022 accounts payable disbursement Summary of Warrants 426152 through 426893, Workers' Compensation distributions, wire transfers, payroll withholding distributions and voided checks in the total amount of \$22,677,170.

8. 230 COMMERCE AND WATERWORKS BUSINESS PARK OFFICE PROPERTY LISTING AGREEMENT EXTENSION

Recommendation: That the Board approve an extension of the listing agreements for the 230 Commerce office property and Waterworks Business Park office property with the brokerage team of Colliers International through May 1, 2023 consistent with previously agreed-upon commission terms.

9. REIMBURSEMENT AGREEMENT BETWEEN IRWD AND THE CITY OF IRVINE FOR THE FISCAL YEAR 2021-22 ANNUAL STREET REHABILITATION AND SLURRY SEAL PROJECT

Recommendation: That the Board authorize the General Manager to execute the Reimbursement Agreement between IRWD and the City of Irvine for Installation and Adjustment of Street Utilities to Grade for the FY 2021-22 Annual Street Rehabilitation and Slurry Seal Project, subject to non-substantive changes.

10. LAKE FOREST WOODS SEWER IMPROVEMENTS BUDGET INCREASE AND CONSULTANT SELECTION

Recommendation: That the Board authorize a budget increase for Project 11123 in the amount of \$4,960,000, from \$353,000 to \$5,313,000, and authorize the General Manager to execute a Professional Services Agreement with Woodard & Curran in the amount of \$428,075 for engineering design services for the Lake Forest Woods Sewer Improvements, Project 11123.

ACTION CALENDAR

15 MG ZONE 1 RESERVOIR INTERIOR COATING AND IMPROVEMENTS BUDGET INCREASE AND CONTRACT CHANGE ORDER

On MOTION by Reinhart, seconded by Swan, THE BOARD AUTHORIZED A BUDGET INCREASE FOR PROJECT 05761 IN THE AMOUNT OF \$1,131,825, FROM \$4,020,000 TO \$5,151,825, AND APPROVED CONTRACT CHANGE ORDER NO. 4 IN THE AMOUNT OF \$791,975 AND THE ADDITION OF 42 CALENDAR DAYS TO THE CONTRACT TIME WITH PACIFIC HYDROTECH CORPORATION FOR THE 15 MG ZONE 1 RESERVOIR INTERIOR COATING AND IMPROVEMENTS, PROJECT 05761.

ACTION CALENDAR (CONTINUED)

2022 LEGISLATIVE AND REGULATORY UPDATE

Director of Strategic Communications and Advocacy/Deputy General Counsel Compton reported on the 2022 California State Budget noting Governor Newsom’s May Revise, a 2022 State Legislative update noting recommendations on AB 2357 (Ting) – surplus land, AB 2536 (Grayson) Impact Fee Nexus Studies: Connection Fees and Capacity charges, ACR 180 (Bauer - Jahn) Special District Work, and SB 1345 (Ochoa Bogh) Excavations – Subsurface Installations. Ms. Compton further reviewed a 2022 State and Regional Regulatory Update and a 2022 Federal Legislative and Regulatory update.

Director McLaughlin said that this item was reviewed by the Water Resources Policy and Communications Committee on May 11, 2022, and on MOTION by McLaughlin, seconded by Reinhart, THE BOARD ADOPTED AN “OPPOSE UNLESS AMENDED” POSITION ON AB 2357 (TING) AND SB 1345 (OCHOA BOGH), A “WATCH” POSITION ON AB 2536 (GRAYSON), AND A “SUPPORT” POSITION ON ACR 180 (BAUER-KAHAN).

GENERAL MANAGER’S REPORT

General Manager Cook reported that COVID-19 cases were up at the District with nine active cases since Saturday.

Mr. Cook introduced Mr. Gus Baretto, the District’s recently promoted Field Services Manager, to the Board.

COMMUNITY UPDATE

Mr. Newell noted recent activity with the sheared fire hydrant at Santiago and Loma Ridge.

DIRECTORS’ COMMENTS

Director Swan reported on his attendance at an OCBC Infrastructure meeting, a MWDOC Administration and Finance Committee meeting, a WACO meeting, a WACO Planning meeting, and a four-day Water Education Foundation Bay Delta tour. In response to Director Swan’s request to add an item to the Finance and Personnel Committee meeting to discuss the significant increase in the capital budget which may impact the Replacement Fund, General Manager Cook said he will add an item to the agenda.

Director Reinhart reported on his attendance at a WACO meeting, an OCWD Water Issues Committee meeting, and a MWDOC Board meeting.

Director McLaughlin reported on her attendance at a WACO meeting and a Southern California Water Coalition Task Force meeting.

Director LaMar reported on his attendance at a Natural Communities Coalition Executive Committee meeting and a Southern California Water Coalition Task Force meeting.

CLOSED SESSIONS

General Counsel Collins reported that the following Closed Sessions would be held this evening:

- 1) CONFERENCE WITH LEGAL COUNSEL—EXISTING LITIGATION – Pursuant to Government Code Section 54956.9(d)(1):
Graciela Montejano v. IRWD, Paul Cook and Does 1 through 50, Case No. 30-2022-01251588-CU-OE-NJC, and

- 2) CONFERENCE WITH LABOR NEGOTIATOR – Pursuant to Government Code Section 54957.6
Agency Designated Representatives: Paul Cook, General Manager, and Tiffany Mitcham, Director of Human Resources
Employee Group: Managers, Supervisors and Confidential Employees

OPEN SESSION

Following the Closed Session, the meeting was reconvened with Directors Swan, McLaughlin, Reinhart and LaMar present. No action was reported.

ADJOURNMENT

There being no further business, President LaMar adjourned the meeting at 6:00 p.m.

APPROVED and SIGNED this 13th day of June 2022.

President, IRVINE RANCH WATER
DISTRICT

Secretary IRVINE RANCH WATER
DISTRICT

APPROVED AS TO FORM:

Claire Hervey Collins, General Counsel
Hanson Bridgett LLP

June 13, 2022
Prepared and
submitted by: K. Swan
Approved by: Paul A. Cook *P.A.C.*

CONSENT CALENDAR

RATIFY/APPROVE BOARD OF DIRECTORS’
ATTENDANCE AT MEETINGS AND EVENTS IN 2022

SUMMARY:

Pursuant to Resolution 2014-38 adopted on August 25, 2014, the following events and meetings require approval by the Board of Directors:

Steve LaMar

June 7 Climate Change Adaptation Process Meeting with District Staff

Douglas Reinhart

June 2 Meeting with District Staff and Legal Counsel via teleconference

Peer Swan

May 6 Orange County Business Council Advocacy and Government Affairs
Committee Meeting

June 9 Water Education Foundation Making Progress on Drought Management,
UCI

John Withers

June 9 Water Education Foundation Making Progress on Drought Management,
UCI

June 16 Celebrate Irvine Annual Event featuring Mayor Khan


RECOMMENDATION:

THAT THE BOARD RATIFY/APPROVE THE EVENTS FOR STEVEN LAMAR,
DOUGLAS REINHART, PEER SWAN, AND JOHN WITHERS, AS DESCRIBED HEREIN.

LIST OF EXHIBITS:

None.

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June 13, 2022
Prepared and
submitted by: C. Compton
Approved by: Paul A. Cook 

CONSENT CALENDAR

2022 LEGISLATIVE AND REGULATORY UPDATE

SUMMARY:

This report provides an update on the 2021-2022 legislative session, regulatory issues, and IRWD priorities. As legislation and regulations develop, staff provides updates and recommendations to the Water Resources Policy and Communications (WRP) Committee and the Board, as appropriate. Staff recommends the Board receive and file this report.

BACKGROUND:

May 27 was the House of Origin deadline, the deadline by which each house of the Legislature is required to pass bills introduced in that house if they are to move forward. The next legislative deadline is June 15, the constitutional deadline for passage of the State Budget. July 1 is the last day for policy committees to meet and report bills, and the day that the Legislature begins its month-long summer recess, upon adjournment.

A copy of the 2022 Legislative Matrix is provided as Exhibit “A”. Links to the bills discussed below are included with each discussion unless a separate exhibit is noted.

2022 State Legislative Update:

As has been traditionally done after the House of Origin deadline, staff provided the WRP Committee an update on bills on which IRWD has taken a position or has actively monitored during this legislative session. The location of each bill, as of the writing of this report, is noted below.

- *AB 1001 (Christine Garcia, D-Bell Gardens) – Mitigation Measures for Air Quality Impacts: Environmental Justice:* AB 1001 is a two-year bill. As it was amended on the Assembly floor in January, the bill would have required mitigation pursuant to the California Environmental Quality Act (CEQA) to compensate for adverse air or water quality impacts in a disadvantaged community (DAC) and require that the mitigation for those impacts occur directly in the affected community. Amendments that were processed in the Senate remove the bill’s applicability to water quality. IRWD currently has a “watch” position on AB 1001. As of the writing to this report, the bill is in the Senate Environmental Quality Committee;
- *AB 1817 (Ting, D-San Francisco) – Textile Articles Containing Perfluoroalkyl and Polyfluoroalkyl Substances (PFAS):* AB 1817 would prohibit the manufacture, distribution, sale, or offering of any textile article, as defined, that contains PFAS, beginning January 1, 2025. As of writing to this report, the bill is in the Senate Rules Committee pending referral to a policy committee;

- *AB 1944 (Lee, D-Milpitas) – Local Agency Teleconferences:* AB 1944 would allow members of a legislative body of a local agency to use teleconferencing without identifying each teleconference location in the notice and agenda of the meeting or proceeding, and without making each teleconference location accessible to the public. As of the writing to this report, the bill is in the Senate Rules Committee pending referral to a policy committee;
- *AB 2078 (Flora, R-Ripon) – Atmospheric Rivers Research, Mitigation, and Climate Forecasting Program:* AB 2078 would require the Department of Water Resources (DWR) to take specified actions to improve predictions of atmospheric rivers and their impacts on water supply, flooding, post-wildfire debris flows, and environmental conditions, and also require DWR to take actions to operate reservoirs in a manner that improves flood protection and to reoperate flood control and water storage facilities to capture water generated by atmospheric rivers. AB 2078 was held on the Assembly Appropriations Committee Suspense File and will not advance this year;
- *AB 2106 (R. Rivas, D-Hollister) – Water Quality Permits:* AB 2106 would require the State Water Resources Control Board to evaluate the state’s stormwater program and the state’s progress towards compliance with water quality standards, to modernize its stormwater data collection systems with specified directives, and establish a statewide commercial, industrial, and institutional National Pollutant Discharge Elimination System (NPDES) order. As of the writing to this report, the bill is in the Senate Environmental Quality Committee;
- *AB 2108 (R. Rivas, D-Hollister) – Environmental Justice: Disadvantaged and Tribal Communities:* AB 2108 would require that the State Board and each Regional Water Quality Control Board have at least one member qualified in the field of water supply and water quality relating to disadvantaged or tribal communities. The bill also requires the State Board and the Regional Boards to make programmatic finds related to potential environmental justice, tribal impact, and racial equity considerations, when issuing regional or statewide plans or policies, or waste discharge requirements or waivers of waste discharge requirements. As of the writing to this report, the bill is in the Senate Environmental Quality Committee and was double-referred to the Senate Natural Resources and Water Committee;
- *AB 2113 (R. Rivas, D-Hollister) – State Water Pollution Cleanup and Abatement Account:* AB 2113 would have required, subject to a future legislative act, specified percentages of the annual proceeds of the State Water Pollution Cleanup and Abatement Account to be transferred to four new accounts within the Waste Discharge Permit Fund. This bill was held on the Assembly Appropriations Committee Suspense File and will not advance this year;
- *AB 2142 (Gabriel, D-Encino) – Turf Replacement Rebate Income Tax Exclusion:* AB 2142 would provide a personal income tax and corporate tax exclusion for turf removal rebates, vouchers, or other financial incentives received by water customers between January 1, 2022, and January 1, 2027. IRWD currently has a “support” position on AB 2142. As of the writing to this report, the bill is in the Senate Governance and Finance Committee;

- *AB 2179 (Grayson, D-Concord) – COVID-19 Relief: Tenancy:* As introduced, AB 2179 would have provided that a local agency that has not met its regional housing needs shall not require the payment of those fees or charges it placed on housing developments until 20 years from the date of the final inspection, or the date the certificate of occupancy is issued, whichever occurs first. AB 2179 was gutted and amended and extends, through June 30, 2022, restrictions on eviction for nonpayment of rental debt that accumulated due to COVID-19 hardship when an application for emergency rental assistance to cover the unpaid rent was filed prior to April 1, 2022, and state preemption of local protections against eviction for nonpayment of rent that were not in place on August 19, 2020. The Governor signed this bill into law on March 31, 2022;
- *AB 2186 (Grayson, D-Concord) – Housing Cost Reduction Incentive Program:* AB 2186 would establish the Housing Cost Reduction Incentive Program, which would reimburse cities and counties for development impact fee reductions provided to qualified rental housing developments, and for the reasonable interest costs associated with impact fee deferrals. As of the writing to this report, the bill is in the Senate Housing Committee and was double-referred to the Senate Governance and Finance Committee;
- *AB 2247 (Bloom, D-Santa Monica) – PFAS Products and Components Publicly Accessible Reporting Platform:* AB 2247 would require, on or before July 2025, PFAS and products and product components containing intentionally added PFAS to be registered on a publicly accessible reporting platform created by the Department of Toxic Substances Control (DTSC) and the Interstate Chemicals Clearinghouse (ICC). As of the writing to this report, the bill is in the Senate Rules Committee pending referral to a policy committee;
- *AB 2357 (Ting, D-San Francisco) – Surplus land:* AB 2357 proposes to revise the definition of “surplus land” in the Surplus Land Act (SLA) and restrict a special district’s ability to dispose of land that is exempt from the SLA. AB 2357 would remove certain provisions the District negotiated for and obtained in [AB 1486 \(2019, Ting\)](#) related to a special district’s disposal of “exempt surplus land” used for investment purposes or other agency use. IRWD currently has an “oppose unless amended” position on AB 2357. As of the writing to this report, the bill is in the Senate Governance and Finance Committee and was double-referred to the Senate Housing Committee;
- *AB 2387 (E. Garcia, D-Coachella) – Safe Drinking Water, Wildfire Prevention, Drought Preparation, Flood Protection, Extreme Heat Mitigation and Workforce Development Bond Act of 2022:* AB 2387 would place a proposition on the November 8, 2022, statewide ballot to authorize \$7.43 billion in general obligation bonds to finance projects for ensuring safe drinking water, wildfire prevention, drought preparation, flood protection, extreme heat mitigation, and workforce development. AB 2041 was held on the Assembly Appropriations Committee Suspense File and will not advance this year;
- *AB 2449 (B. Rubio, D-Baldwin Park) – Local Agency Teleconferences:* AB 2449 would allow members of a legislative body of a local agency to use teleconferencing without identifying each teleconference location in the notice and agenda of the meeting, and without making each teleconference location accessible to the public, if at least a quorum of the members of the body participates in person. As of the writing to this report, the bill is in the Senate Rules Committee pending referral to a policy committee;

- *AB 2531 (Grayson, D-Concord) – Housing Data Collection and Reporting:* AB 2531 would have required a city, county, or special district to create a landing page on its website with links to the specified information that is required to be made available on its website under existing law and appears to be a housing data legislative vehicle. This bill did not receive a policy committee hearing and is now dead for the legislative session;
- *AB 2536 (Grayson, D-Concord) – Impact Fee Nexus Studies: Connection fees and Capacity Charges:* AB 2536, as introduced, would have impacted IRWD’s ability to set and charge cost-of-service-based connection fees, but this bill was amended to remove the proposed requirement for a local agency that imposes a fee or capacity charge to support the estimate of reasonable cost of providing service by following specified standards and practices. IRWD’s existing practices meet the amended bill’s evaluation requirements. As of writing to this report, the bill is in the Senate Governance and Finance Committee;
- *ACR 180 (Bauer-Kahan, D-Orinda) – Special Districts Week:* ACR 180 would proclaim May 15-21, 2022, Special Districts Week and, as with resolutions in previous years, is sponsored by the California Special Districts Association. IRWD currently has a “support” position on ACR 180. As of writing to this report, the resolution is on the Senate Floor;
- *SB 222 (Dodd, D-Napa) – Water Rate Assistance Program:* SB 222 would require the Department of Community Services and Development (CSD) to develop and administer a Water Rate Assistance Program to provide water affordability assistance for drinking water and wastewater services to low-income ratepayers. IRWD currently has a “watch” position on SB 222. This two-year bill passed the Senate and advanced to the Assembly floor in 2021 and is currently on the inactive file;
- *SB 938 (Hertzberg, D-Van Nuys) – Cortese-Knox-Hertzberg Proceedings:* SB 938, in addition to consolidating the protest threshold provisions in the Cortese-Knox-Hertzberg Act, would establish a new voter protest threshold for LAFCO-initiated special district dissolutions under specified conditions. IRWD currently has a “support” position on SB 938. As of writing to this report, the bill is set to be heard in the Assembly Local Government Committee on June 8, 2022;
- *SB 1044 (Durazo, D-Los Angeles) – State of Emergency or Emergency Condition Employer Retaliation:* SB 1044 would prohibit an employer from taking or threatening an adverse action against any employee for refusing to report to, or leave, a workplace because the employee feels unsafe during a state of emergency or an emergency condition. As of the writing to this report, the bill is in the Assembly pending referral; and
- *SB 1157 (Hertzberg, D-Van Nuys) – Indoor Residential Water Use Standard:* SB 1157 would lower the indoor residential water use standard, as recommended to the Legislature jointly by DWR and the State Board. SB 1157 is currently in the Assembly Water, Parks, and Wildlife Committee. IRWD currently has an “oppose unless amended” position on SB 1157.

On June 2, 2022, staff provided the WRP Committee with an update on the development of the Fiscal Year 2022-23 State Budget and discussed other bills of interest.

2022 State and Regional Regulatory Update:

The following is a list of some of the State regulations and agency reports staff is monitoring, tracking, or planning to engage in over the next three to 12 months. As the next drafts of the regulations or reports are released for public review and comment, staff will engage, as appropriate. The pending regulations, administrative actions and reports actively being tracked include the:

- Executive and regulatory actions on COVID-19;
- Executive and regulatory actions related to the drought;
- California Air Resources Board (CARB) [AB 32 Climate Change Scoping Plan Update](#);
- CARB's [Proposed Advanced Clean Fleets Regulation](#);
- CARB's [Proposed In-use Off-road Diesel-Fueled Fleets Regulation Amendments](#);
- California Endangered Species Act Listing for the Southern California steelhead;
- California Natural Resources Agency (CNRA) [30 x 30 California Implementation](#);
- CNRA's [Water Resilience Portfolio Implementation](#);
- DWR's 2023 California Water Plan Update;
- DWR and the State Board's implementation of the "[Making Water Conservation a California Way of Life](#)" legislation;
 - DWR and the State Board's Indoor Water Use Study and Indoor Water Use Standard Recommendations;
 - DWR's Outdoor Standard Recommendations;
 - DWR's Work Group on CII performance measures; and
 - State Board's [Water Loss Performance Standards Regulations](#);
- State Board's development of a "Cross Connection Policy Handbook;"
- State Board's Direct Potable Reuse regulations;
- State Board's actions on lead service lines;
- State Board's [Draft Statewide Sanitary Sewer System General Order](#);
- State Board's [Safe and Affordable Funding for Equity and Resilience \(SAFER\) Drinking Water Program](#);
- South Coast AQMD's [PR 403.2 – Fugitive Dust from Road Construction Projects](#); and
- South Coast AQMD's [Cumulative Impacts from Air Toxics for CEQA Projects](#).

2022 Federal Legislative and Regulatory Update:

IRWD's federal advocacy efforts in 2022 continue to largely focus on seeking federal funding for the Kern Fan Groundwater Storage Project and advocating for an increased funding authorization for the federal Water Storage Program.

FISCAL IMPACTS:

Not applicable.

ENVIRONMENTAL COMPLIANCE:

Not applicable.

COMMITTEE STATUS:

This item was reviewed by the Water Resources Policy and Communications Committee on June 2, 2022.

RECOMMENDATION:

RECEIVE AND FILE.

LIST OF EXHIBITS:

Exhibit "A" – IRWD Legislative Matrix

EXHIBIT "A"
IRWD 2022 LEGISLATIVE MATRIX
Updated 05/25/2022

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
<u>AB 84</u> Budget Cmt	COVID 19: Supplemental Paid Sick Leave		Provides for COVID 19 supplemental paid sick leave for covered employees who are unable to work or telework due to certain reasons related to COVID 19, including that the employee is attending a COVID 19 vaccine or vaccine booster appointment for themselves or a family member, or is experiencing symptoms, or caring for a family member experiencing symptoms, related to a COVID 19 vaccine or vaccine booster. Entitles a covered employee to a specified number of hours of COVID 19 supplemental paid sick leave.	02/09/2022 - Re-referred to SENATE Committee on BUDGET AND FISCAL REVIEW.
<u>AB 252</u> Rivas R (D)	Multibenefit Land Repurposing Incentive Program		Establish the Multibenefit Land Repurposing Program, for purposes of assisting groundwater sustainability agencies in critically overdrafted basins achieve their groundwater sustainability goal by providing grants to public and private entities for projects and programs that reduce groundwater use by converting irrigated agricultural land to new uses that both reduce groundwater demand or use and provide some other measurable benefits to the environment or broader community.	09/07/2021 - In SENATE. From third reading. To Inactive File.
<u>AB 284</u> Rivas R (D)	Global Warming Solutions Act of 2006: Climate Goal		Requires the state board, as part of the next scoping plan update, in collaboration with the Natural Resources Agency and other relevant state agencies and departments and no later than a specified date, to identify a 2045 climate goal, with interim milestones, for the state's natural and working lands, as defined, and to integrate into the scoping plan update recommendations developed by the Natural Resources Agency and the Department of Food and Agriculture.	09/02/2021 - In SENATE. From third reading. To Inactive File.
<u>AB 343</u> Fong (R)	California Public Records Act Ombudsperson		Establishes, within the California State Auditor's Office, the California Public Records Act Ombudsperson. Requires the California State Auditor to appoint the Ombudsperson subject to certain requirements. Requires the Ombudsperson to receive and investigate requests for review, determine whether the denials of	06/09/2021 - To SENATE Committees on JUDICIARY and GOVERNMENTAL ORGANIZATION.

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Bill No. Author	Title	IRWD Position	Summary/Effects	Status
			original requests complied with the California Public Records Act, and issue written opinions of its determination.	
<u>AB 350</u> Villapudua (D)	Cannella Environmental Farming Act of 1995		Requires the Department of Food and Agriculture to establish and administer a 3-year grant program to fund technical assistance to support landowners located in a critically overdrafted basin, as defined, in reaching water use reduction goals established pursuant to the Sustainable Groundwater Management Act. Authorizes the department to use specified guidelines to administer this program.	09/02/2021 - In SENATE. From third reading. To Inactive File.
<u>AB 363</u> Medina (D)	Carl Moyer Air Quality Standards Attainment Program		Requires the state board to establish or update grant criteria and guidelines for covered vehicle and infrastructure projects as soon as practicable, but not later than July 1, 2017. The state board's program guidelines describe the minimum criteria and requirements for on-road heavy-duty vehicles and the types of projects that can be incentivized to provide surplus emissions reductions from on-road heavy-duty vehicles through contracts or through the On-Road Heavy-Duty Voucher Incentive Program (VIP).	07/13/2021 - In SENATE Committee on TRANSPORTATION: Not heard.
<u>AB 386</u> Cooper (D)	Public Employees Retirement: Investments: Confidential		Exempts from disclosure under the California Public Records Act specified records regarding an internally managed private loan made directly by the Public Employees' Retirement Fund. Provides that these records would include quarterly and annual financial statements of the borrower or its constituent owners, unless the information has already been publicly released by the keeper of the information. Prescribes specified exceptions to this exemption from disclosure.	07/13/2021 - In SENATE Committee on JUDICIARY: Failed passage.;07/13/2021 - In SENATE Committee on JUDICIARY: Reconsideration granted.
<u>AB 404</u> Salas (D)	Workers' Compensation: Medical-Legal Expenses		Relates to Workers compensation. Requires that the medical-legal fee schedule be reviewed, and updated if necessary, to increase the conversion factor by the percentage increase in the most recent federal Medicare Economic Index.	08/26/2021 - In SENATE Committee on APPROPRIATIONS. Held in committee and made a Two-year bill.

IRWD 2022 LEGISLATIVE MATRIX
Updated 05/25/2022

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
<u>AB 649</u> Bennett (D)	Department of Resources Recycling and Recovery		Establishes the Office of Environmental Justice and Tribal Relations within the department. Prescribes the duties of the office, including, among others, ensuring that the department's programs effectively address the needs of disadvantaged communities, low-income communities, California Native American tribes, and farmworkers.	05/04/2022 - To SENATE Committee on ENVIRONMENTAL QUALITY.
<u>AB 732</u> Quirk (D)	Mercury-Added Thermostats		Deletes the requirement that the department determine whether a manufacturer, or group of manufacturers, has made a good faith effort to comply with the act, but would continue to subject the thermostats of a manufacturer that fails to obtain department approval of the plan or to make a required payment to a sales ban. Requires each manufacturer, or group of manufacturers, to automatically provide collection bins for out-of-service mercury-added thermostats to a thermostat wholesaler in the state.	05/11/2022 - From SENATE Committee on ENVIRONMENTAL QUALITY with author's amendments.;05/11/2022 - In SENATE. Read second time and amended. Re-referred to Committee on ENVIRONMENTAL QUALITY.
<u>AB 753</u> Grayson (D)	Barry Keene Underground Storage Tank Cleanup Trust Fund		Authorizes eligible owners and operators of underground storage tanks containing petroleum to file claims with the state board for reimbursement from the fund of corrective action costs, as provided, incurred to address releases of petroleum from these tanks.	08/26/2021 - In SENATE Committee on APPROPRIATIONS: Held in committee.
<u>AB 754</u> Mathis (R)	Sustainable Groundwater Management		Authorizes the Department of Water Resources to extend the deadline for a high- or medium-priority basin not subject to critical conditions of overdraft to be managed under a groundwater sustainability plan or coordinated plans upon request of a local agency or groundwater sustainability agency in the basin for an extension of a specified period of time.	07/12/2021 - In SENATE Committee on NATURAL RESOURCES AND WATER: Failed passage.;07/12/2021 - In SENATE Committee on NATURAL RESOURCES AND WATER: Reconsideration granted.
<u>AB 897</u> Mullin (D)	Office of Planning and Research: Regional Climate		Authorizes eligible entities, as defined, to establish and participate in a regional climate network, as defined. Requires the office, through the program, to encourage the inclusion of eligible entities with land use planning and hazard mitigation planning authority into regional climate networks. Authorizes a regional climate	08/26/2021 - In SENATE Committee on APPROPRIATIONS: Held in committee.

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Bill No. Author	Title	IRWD Position	Summary/Effects	Status
			network to engage in activities to address climate change, as specified.	
<u>AB 975</u> Rivas (D)	Filing Requirements and Gifts		Permits a filing officer to retain a report or statement filed in a paper format as a copy on microfilm or other space-saving materials or as an electronic copy, as specified, without a two-year waiting period. Permits a filing officer to retain a report or statement as an electronic copy before the Secretary of State certifies an online filing and disclosure system.	05/05/2022 - From SENATE Committee on ELECTIONS AND CONSTITUTIONAL AMENDMENTS with author's amendments.;05/05/2022 - In SENATE. Read second time and amended. Re-referred to Committee on ELECTIONS AND CONSTITUTIONAL AMENDMENTS.
<u>AB 1001</u> Garcia (D)	Mitigation Measures for Air and Water Quality Impacts	WATCH	Requires mitigation measures, identified in an environmental impact report or mitigated negative declaration to mitigate the adverse effects of a project on air quality of a disadvantaged community, to include measures for avoiding, minimizing, or otherwise mitigating for the adverse effects on that community. Requires mitigation measures to include measures conducted at the project site that avoid or minimize to less than significant the adverse effects on the air quality of a disadvantaged community.	05/04/2022 - Re-referred to SENATE Committee on ENVIRONMENTAL QUALITY.
<u>AB 1017</u> Quirk-Silva (D)	Public Restrooms: Right to Restrooms Act of 2021		Requires each local government, as defined, to complete an inventory of public restrooms owned and maintained by the local government, either directly or by contract, that are available to the general population in its jurisdiction. Requires each local government to make its inventory available to agencies and service providers that work directly with homeless populations within the local government's jurisdiction and, with certain exceptions, to make the inventory available on its internet website.	08/26/2021 - In SENATE Committee on APPROPRIATIONS: Held in committee.
<u>AB 1041</u> Wicks (D)	Leave Issues		Expands the population that an employee can take leave to care for to include a designated person. Defines "designated person" to mean a person identified by the employee at the time the employee	09/09/2021 - In SENATE. To Inactive File.

IRWD 2022 LEGISLATIVE MATRIX
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Bill No. Author	Title	IRWD Position	Summary/Effects	Status
			requests family care and medical leave. Authorizes an employer to limit designation of a person, as prescribed.	
<u>AB 1086</u> Aguiar-Curry (D)	Organic Waste: Implementation Strategy		Requests that the State Council on Science and Technology, in consultation with its academic and research partners and specified state agencies undertake and, within specified months of entering into a contract, complete a report that provides an implementation strategy to achieve the state's organic waste, and related climate change and air quality, mandates, goals, and targets. Requires the council to provide the report to the relevant state agencies after peer review.	08/26/2021 - In SENATE Committee on APPROPRIATIONS: Held in committee.
<u>AB 1164</u> Flora (R)	Publicly Owned or Operated Regulating Basins		Excludes from being considered a dam a regulating basin, as defined, owned or operated by a public entity that is not across a stream channel, watercourse, or natural drainage if certain criteria are met. Includes that the owner or operator of the regulating basin, before the construction of the regulating basin, submit to the department an inundation map, stamped by a licensed civil engineer, identifying the flow and depth of water from the regulating basin in the event of a failure.	05/23/2022 - From SENATE Committee on NATURAL RESOURCES AND WATER with author's amendments.;05/23/2022 - In SENATE. Read second time and amended. Re-referred to Committee on NATURAL RESOURCES AND WATER.
<u>AB 1384</u> Gabriel (D)	Resiliency Through Adaptation, Economic Vitality		Requires the agency to also coordinate with the Office of Planning and Research and identify, among other things, vulnerabilities to climate change for vulnerable communities, an operational definition of "climate resilience" for each sector and for vulnerable communities, special protections of vulnerable communities and industries that are disproportionately impacted by climate change, opportunities to improve policy and budget coordination across jurisdictions, and timetables and specific metrics.	04/19/2022 - In SENATE. Read second time. To third reading.
<u>AB 1395</u> Muratsuchi (D)	The State Climate Crisis Act		Declares the policy of the state both to achieve net zero greenhouse gas emissions as soon as possible, but no later than a specified year, and achieve and maintain net negative greenhouse gas emissions thereafter, and to ensure that by a specified year, statewide	09/10/2021 - In SENATE. Read third time. Failed to pass SENATE.;09/10/2021 - In SENATE. Motion to reconsider.;09/10/2021 - In

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Bill No. Author	Title	IRWD Position	Summary/Effects	Status
			anthropogenic greenhouse gas emissions are reduced to at least 90% below the 1990 levels.	SENATE. Reconsideration granted.;09/10/2021 - In SENATE. From third reading. To Inactive File.
<u>AB 1431</u> Frazier (D)	Forestry: Forest Carbon and Resilience Goals		Establishes state goals for fuels treatment, vegetation management, and wildfire risk reduction, including, but not limited to, increasing vegetation management on nonfederal lands and urging the federal government to increase vegetation management on federal lands, as provided, and increasing the pace and scale of home hardening efforts to harden at least 100,000 existing homes per year by 2025.	08/26/2021 - In SENATE Committee on APPROPRIATIONS: Held in committee.
<u>AB 1604</u> Holden (D)	The Upward Mobility Act of 2022: Boards and Commissions		Requires that, on or after specified date, all state boards and commissions consisting of one or more volunteer members have at least one board member or commissioner from an underrepresented community. Defines the term board member or commissioner from an underrepresented community. Authorizes the Department of Human Resource, at the direction of and in conjunction with the State Personnel Board, to conduct audits and investigations of personnel practices of other departments and appointing authorities.	05/19/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 1610</u> Lackey (R)	State Mandates: Claims		Provides that no claim for reimbursement by a local government or school district for a state-mandated cost shall be made or paid unless it exceeds \$800.	01/14/2022 - To ASSEMBLY Committee on LOCAL GOVERNMENT.
<u>AB 1640</u> Ward (D)	Regional Climate Adaptation and Resilience Action Plans		Requires the office, through the program, to encourage the inclusion of eligible entities with land use planning and hazard mitigation planning authority into regional climate networks. Authorizes a regional climate network to develop a regional climate adaptation and resilience action plan.	05/23/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 1642</u> Salas (D)	California Environmental Quality Act: Water System Well		Requires a lead agency, before determining that a well project is exempt from California Environmental Quality Act pursuant to these provisions, to contact the state board to determine whether claiming the exemption will affect the ability of the well project to	05/18/2022 - To SENATE Committee on ENVIRONMENTAL QUALITY.

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Bill No. Author	Title	IRWD Position	Summary/Effects	Status
			receive federal financial assistance or federally capitalized financial assistance.	
<u>AB 1651</u> Kalra (D)	Worker Rights: Workplace Technology Accountability Act		Relates to impose various duties on employers and their vendors regarding the ability to collect and use worker data, as defined. Relates to confer the right to workers to know, review, correct, and secure data collected from them by their employer and would limit the ability of an employer to use that data beyond specified purposes.	04/20/2022 - From ASSEMBLY Committee on LABOR AND EMPLOYMENT: Do pass to Committee on PRIVACY AND CONSUMER PROTECTION.
<u>AB 1687</u> Seyarto (R)	California Emergency Services Act: Governor's Powers		Provides that the Governor may only suspend a statute or regulation during a state of emergency or state of war emergency in connection with the specific conditions of emergency proclaimed by the Governor or state of war emergency, as applicable.	05/11/2022 - To SENATE Committee on GOVERNMENTAL ORGANIZATION.
<u>AB 1711</u> Seyarto (R)	Privacy: Breach		Requires an agency to post a notice on the agency's internet website when a person or business operating a system on behalf of the agency is required to issue a security breach notification for that system.	05/12/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 1717</u> Aguiar-Curry (D)	Public Works: Definition		Expands the definition of public works to include fuel reduction work done under contract and paid for in whole or in part out of public funds performed as part of a fire mitigation project.	05/23/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 1721</u> Rodriguez (D)	Seismic Retrofitting: Soft Story Multifamily Housing		Establishes the Seismic Retrofitting Program for Soft Story Multifamily Housing Fund, and its subsidiary account, the Seismic Retrofitting Account, within the State Treasury. Relates to moneys in the fund would be available, upon appropriation by the Legislature, to the California Earthquake Authority for the purposes of distributing funds pursuant to the program.	05/23/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 1724</u> Stone (D)	State Owned Washing Machines: Microfiber Filtration		Requires all state owned washing machines to contain a microfiber filtration system. system with a mesh size of 100 microns or smaller.	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.

IRWD 2022 LEGISLATIVE MATRIX
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Bill No. Author	Title	IRWD Position	Summary/Effects	Status
<u>AB 1725</u> Smith T (R)	Illegal Cultivation of Cannabis		Amends the Control, Regulate and Tax Adult Use of Marijuana Act (AUMA) to make it a felony, punishable by a certain amount of time in county jail, for a person over 18 years of age to plant, cultivate, harvest, dry, or process more than six living cannabis plants. Makes it a felony, punishable by a certain amount of time in county jail, for a person at least 18 years of age but less than 21 years of age to plant, cultivate, harvest, dry, or process less than six living cannabis plants.	03/15/2022 - In ASSEMBLY Committee on PUBLIC SAFETY: Not heard.
<u>AB 1727</u> Medina (D)	Public Works: Fees: Small Business		Reduces the application and annual renewal fee for a small business, as defined, to specified amount. Prohibits the application and renewal fee for a contractor or subcontractor that does not qualify as a small business from being increased to support the above-described fee decrease.	03/21/2022 - From ASSEMBLY Committee on LABOR AND EMPLOYMENT with author's amendments.;03/21/2022 - In ASSEMBLY. Read second time and amended. Re-referred to Committee on LABOR AND EMPLOYMENT.
<u>AB 1733</u> Quirk (D)	State Bodies: Open Meetings		Specify that a meeting under the Bagley-Keene Open Meeting Act, includes a meeting held entirely by teleconference. Requires all open meetings to be held by teleconference, would allow for use of teleconference in closed sessions, and would remove existing provisions of the act that require each teleconference location to be identified in the notice and agenda and accessible to the public.	02/18/2022 - To ASSEMBLY Committees on GOVERNMENTAL ORGANIZATION and BUSINESS AND PROFESSIONS.
<u>AB 1747</u> Quirk (D)	Contractors: Disciplinary Action		Provides that the list of violations that constitute cause for a disciplinary action by the Contractors State License Board includes a willful or deliberate disregard of any state or local law relating to the issuance of building permits, and would authorize a civil penalty not to exceed \$30,000 for any violation included on that list.	05/25/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 1748</u> Seyarto (R)	Exempt Surplus Land: Regional Housing Need		Adds to the definition of exempt surplus land, surplus land that is zoned for a density of up to 30 residential units, if residential properties within a radius of 500 feet of the site are zoned to have	04/27/2022 - In ASSEMBLY Committee on HOUSING AND

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			an allowable density of fewer than 30 dwelling units per acre and the most recent annual progress report, as described.	COMMUNITY DEVELOPMENT: Failed passage.
<u>AB 1749</u> Garcia (D)	Community Emissions Reduction Programs		Requires a district with a population of 1,000,000 persons or more that issues permits to stationary sources of criteria air pollutants or toxic air contaminants to make available in an easily identifiable location on the district's internet website all permits issued by the district for those stationary sources. Increases the duties of, air districts. Requires the state to reimburse local agencies and school districts for certain costs mandated by the state.	05/23/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 1751</u> Daly (D)	Workers' Compensation: COVID-19: Critical Workers		Extends specified workers' compensation provisions relating to COVID-19 until January 1, 2025.	05/19/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 1754</u> Chen (R)	Debt Collection Licensing Act: Collection Agencies		Revises the definition of a collection agency to additionally include a business entity that acts as a broker, forwarder, intermediary, or middleman that sends or refers repossession assignments or repossession orders to repossession agencies or repossession agents in California.	02/10/2022 - To ASSEMBLY Committee on BANKING AND FINANCE.
<u>AB 1757</u> Haney (D)	Groundwater Sustainability Agency		Authorizes a conservation district overlying a groundwater basin in this state to decide to become a groundwater sustainability agency for that basin and would make the law governing the formation of a groundwater sustainability agency applicable to that district.	05/19/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 1761</u> Voepel (R)	Employment: Flexible Work Schedules		Enacts the Workplace Flexibility Act of 2022. Permits an individual nonexempt employee to request an employee-selected flexible work schedule providing for workdays up to 10 hours per day within a 40-hour workweek, and would allow an employer to implement this schedule without the obligation to pay overtime compensation for those additional hours in a workday, except as specified.	02/10/2022 - To ASSEMBLY Committee on LABOR AND EMPLOYMENT.

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<u>AB 1774</u> Seyarto (R)	California Environmental Quality Act: Water Conveyance		Requires the Judicial Council to adopt rules of court applicable to actions or proceedings brought to attack, review, set aside, void, or annul the certification or adoption of an environmental impact report for water conveyance or storage projects, or the granting of project approvals, including any appeals to the court of appeal or the Supreme Court, to be resolved, to the extent feasible, within 270 days of the filing of the certified record of proceedings with the court.	02/10/2022 - To ASSEMBLY Committees on NATURAL RESOURCES and JUDICIARY.
<u>AB 1780</u> Chen (R)	Electronic Transmissions by Corporations		Relates to law that sets forth requirements for the governance of various business entities, including corporations, partnerships, and limited liability companies. Relates to law that authorizes certain transactions and communications to and from these business entities to be conducted by electronic transmission under certain conditions. Removes requirement that the recipient has provided an unrevoked consent, would revise the definition of electronic transmission by the corporation.	05/04/2022 - To SENATE Committees on BANKING AND FINANCIAL INSTITUTIONS and JUDICIARY.
<u>AB 1783</u> Levine (D)	Lobbying: Administrative Actions		Expands the definition of "administrative action" under the Political Reform Act of 1974 to include any decision or approval by the Insurance Commissioner or the Director of the Department of Managed Health Care under these provisions.	05/25/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 1784</u> Smith T (R)	Water Quality, Supply, and Infrastructure Improvement		Makes nonsubstantive changes to provisions of the Water Quality, Supply, and Infrastructure Improvement Act of 2014 pertaining to groundwater sustainability projects.	02/03/2022 - INTRODUCED.
<u>AB 1793</u> Quirk (D)	Hazardous Waste: Acute Aquatic Toxicity Criterion		Requires the Department of Toxic Substances Control, subject to an appropriation by the Legislature in the Budget Act of 2022 that implements a proposal to review the department's hazardous waste criteria, and as part of the department's comprehensive evaluation of its criteria and guidelines for the identification of hazardous wastes and extremely hazardous wastes, to review its acute toxicity criteria, as provided.	05/23/2022 - In ASSEMBLY. Read second time. To third reading.

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<u>AB 1795</u> Fong (R)	Open Meetings: Remote Participation		Requires state bodies, subject to existing exceptions, to provide all persons the ability to participate both in-person and remotely, as defined, in any meeting and to address the body remotely.	02/18/2022 - To ASSEMBLY Committee on GOVERNMENTAL ORGANIZATION.
<u>AB 1799</u> Gallagher (R)	Enforcement of Money Judgments: Exemptions		Relates to existing law that identifies various types of property of a judgment debtor that are exempt from the enforcement of a money judgment, including material that in good faith is about to be applied to the repair or improvement of a residence. Clarifies that this exemption would apply to the judgment debtor's principal place of residence or domicile.	02/18/2022 - To ASSEMBLY Committee on JUDICIARY.
<u>AB 1811</u> Fong M (D)	Delta Plan: Multispecies Conservation Plan		Replaces references to "Bay Delta Conservation Plan" with "multispecies conservation plan" in various provisions and make conforming changes.	05/25/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 1817</u> Ting (D)	Product Safety: Textile Articles: PFAS		Requires a manufacturer of a textile article that contains regulated PFAS to provide persons that offer the product for sale or distribution in the state with a certificate of compliance stating that the textile article is in compliance with these provisions and does not contain any regulated PFAS.	05/23/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 1824</u> Public Employment and Retirement Cmt	Public Employees' Retirement		Revises the description of trustee service under the State Teachers' Retirement Law to link it to the definition of this service, which means duties performed by a member of the governing body of an employer. Specifies that termination of services does not include retired member activities, as defined, or retired participant activities, as defined. Makes Cash Balance Benefit Program.	05/04/2022 - To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
<u>AB 1845</u> Calderon (D)	Metropolitan Water District of Southern California		Authorizes the Metropolitan Water District of Southern California to use the design-build procurement process for certain regional recycled water projects or other water infrastructure projects. Defines "design-build" to mean a project delivery process in which both the design and construction of a project are procured from a	05/25/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.

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			single entity. Requires the district to use a specified design-build procedure to assign contracts for the design and construction of a project, as defined.	
<u>AB 1851</u> Rivas R (D)	Public Works: Prevailing Wage: Hauling		Expands the definition of public works for those purposes to include the on hauling of materials used for paving, grading, and fill onto a public works site. Imposes state-mandated local program. Relates to the requirement for the state to reimburse local agencies and school districts for certain costs mandated by the state. Provides that no reimbursement is required by this act for a specified reason.	05/19/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 1857</u> Garcia (D)	Solid Waste		Deletes those exceptions to the act's general definition of those terms and instead define those terms for purposes of the entire act to mean the final deposition of solid wastes onto land, into the atmosphere, or into the waters of the state, including, but not limited to, through landfill disposal, transformation, or EMSW conversion, at a permitted solid waste facility.	05/23/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 1865</u> Bennett (D)	Court Fee Waiver: Water Rights Cases		Requires a court to initially grant permission to proceed without paying court fees and costs to a person who was joined or countersued in a case involving a water right held by the person.	05/25/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 1879</u> Mathis (R)	Water Quality Control Boards Frivolous Complaints		Authorizes a regional board to develop a plan or policy to address unfounded, as defined, or frivolous, as defined, complaints.	05/25/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 1883</u> Quirk-Silva (D)	Public Restrooms		Requires each local government, as defined, to complete an inventory of public restrooms owned and maintained by the local government, either directly or by contract, that are available to the general population in its jurisdiction. Requires local governments to report their findings to the State Department of Public Health, which would be required to compile the information and to make the inventory available in a searchable database on its internet website. Requires the database to be updated quarterly.	05/19/2022 - In ASSEMBLY. Read second time. To third reading.

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Bill No. Author	Title	IRWD Position	Summary/Effects	Status
<u>AB 1886</u> Cooper (D)	Public Works: Definition		Expands the definition of public works to include street sweeping maintenance performed for the preservation, protection, and keeping of any publicly owned or publicly operated street, road, or highway done under contract and paid for in whole or in part out of public funds.	04/07/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 1906</u> Stone (D)	Voluntary Stream Restoration: Property Owner Liability		Relates to existing law which requires a qualifying state agency that funds a project to restore fish and wildlife habitats to indemnify and hold harmless a real property owner who voluntarily allows their real property to be used for the project from civil liability for property damage or personal injury resulting from the project. Deletes the requirement that costs be submitted as a claim by the real property owner to the Department of General Services.	05/18/2022 - To SENATE Committees on NATURAL RESOURCES AND WATER and JUDICIARY.
<u>AB 1910</u> Garcia (D)	Publicly Owned Golf Courses: Conversion: Housing		Requires the Department of Housing and Community Development to administer a program to provide incentives in the form of grants to local agencies that enter into a development agreement to convert a golf course owned by the local agency into housing and publicly accessible open space, as specified. Requires the department to award funding in accordance with the number of affordable units a local agency proposes to construct.	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>AB 1933</u> Friedman (D)	Property Taxation: Welfare Exemption: Nonprofit		Makes a nonprofit corporation liable for property tax for the years for which the property was exempt from taxation pursuant to the bill' s provisions if the property was not developed or rehabilitated, or if the development or rehabilitation is not in the course of construction, by specified dates depending on the date the nonprofit corporation acquired the property.	05/23/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 1944</u> Lee (D)	Local Government: Open and Public Meetings		Requires an updated agenda reflecting all of the members participating in the meeting remotely to be posted, if a member of the legislative body elects to participate in the meeting remotely after the agenda is posted. Authorizes a member to be exempt from	05/25/2022 - In ASSEMBLY. Read third time and amended. To third reading.

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			identifying the address of the member's teleconference location in the notice and agenda or having the location be accessible to the public.	
<u>AB 1949</u> Low (D)	Employees: Bereavement Leave		Grants specified permanent employees of the state up to 3 days of bereavement leave, with up to 2 additional days of bereavement leave upon request if the death is out of state. Recast those provisions to specify that the first 3 days of bereavement leave are to be paid leave, and to remove the condition that the death be out of state for the additional 2 days.	05/19/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 1953</u> Maienschein (D)	Drinking Water: Accessible Water Bottle Refill Stations		Requires, by specified date, the owner or operator of a transit hub, local park, public building, publicly owned building, shopping mall, or municipal golf course that has a water infrastructure source to install and maintain at least one, or maintain at least one existing, accessible water bottle refill station, as prescribed and except as specified.	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>AB 1956</u> Mathis (R)	Solid Waste: Woody Biomass: Collection and Conversion		Creates a 5-year woody biomass rural county collection and disposal pilot program, to be administered by the Department of Resources Recycling and Recovery. Requires a county awarded funding under the program to contract with a local compost facility, mulch production facility, or biomass conversion facility to collect and to process or convert the biomass in a way that results in less greenhouse gas emitted than if the biomass had been disposed of.	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>AB 1980</u> Irwin (D)	Statute of Limitation: Ransomware		Relates to the statute of limitation and ransomware. Requires prosecution for that offense to commence within 3 years after the person is initially identified by law enforcement as a suspect in the commission of that offense, as specified.	03/15/2022 - In ASSEMBLY Committee on PUBLIC SAFETY: Not heard.
<u>AB 1985</u> Rivas R (D)	Organic Waste: List: Available Products		Requires the State Air Resources Board to compile and maintain on its internet website a list, organized by ZIP Code, of information regarding persons or entities that produce and have available in the	05/19/2022 - In ASSEMBLY. Read second time. To third reading.

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			state organic waste products and update the list at least every 6 months.	
<u>AB 1993</u> Wicks (D)	Employment: COVID-19 Vaccination Requirements		Requires an employer to require each person who is an employee or independent contractor, and who is eligible to receive the COVID-19 vaccine, to show proof to the employer, or an authorized agent thereof, that the person has been vaccinated against COVID-19. Establishes an exception from this vaccination requirement for a person who is ineligible to receive a COVID-19 vaccine due to a medical condition or disability or because of a sincerely held religious belief, as specified.	04/18/2022 - In ASSEMBLY. Coauthors revised.
<u>AB 1996</u> Cooley (D)	State Government: Administrative Regulations: Review		Requires each state agency to, on or before January 1, 2026, review that agency's regulations, identify any regulations that are duplicative, overlapping, inconsistent, or out of date, to revise those identified regulations, as provided, and report to the Legislature and Governor, as specified. Repeals these provisions on January 1, 2027.	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>AB 2005</u> Valladares (R)	Forestry: Wildfire and Forest Resilience Action Plan		Relates to existing law that requires the Wildfire and Forest Resilience Task Force, on or before January 1, 2023, and annually thereafter until January 1, 2048, to submit a report containing specified information, including progress made in achieving the goals and key actions identified in the action plan, to the appropriate policy and budget committees of the Legislature. Extends the time period for the submission of the annual report to January 1, 2049.	02/24/2022 - To ASSEMBLY Committee on NATURAL RESOURCES.
<u>AB 2016</u> Bauer-Kahan (D)	State Water Resources Control Board: Desalination Plant		Repeals certain provisions of law that requires the Department of Water Resources to report to the Legislature on potential opportunities and impediments for using seawater and brackish water desalination, and to examine what role, if any, the state should play in furthering the use of desalination technology. Requests the California Council on Science and Technology, in	05/23/2022 - In ASSEMBLY. Read second time. To third reading.

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			consultation with the department, to undertake and complete a comprehensive feasibility study.	
<u>AB 2041</u> Garcia E (D)	California Safe Drinking Water Act		Requires the State Water Resources Control Board to determine which public water system may not be able to comply with the primary drinking water standard without receiving financial assistance and develop a compliance plan, including a financial plan to assist that public water system in complying with the primary drinking water standard.	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>AB 2054</u> Quirk-Silva (D)	Corporation Taxes: Mutual Water Companies		Requires the California Association of Mutual Water Companies Joint Powers Risk and Insurance Management Authority, commencing specified date, to conduct outreach to eligible mutual ditch or irrigation companies regarding the potential repeal of the exemption. Authorizes the Franchise Tax Board to request additional information necessary to ensure the accuracy of a certification and would require the Franchise Tax Board to develop necessary forms and schedules to implement the certification requirement.	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>AB 2059</u> Carrillo (D)	Hazardous Materials Business and Area Plans		Narrows the definition of consumer product to require that the commodity be present in the same form, concentration, and quantity as a product prepackaged for distribution to a consumer for personal, family, or household purposes, instead of for use by the general public, and by otherwise narrowing the exemption for consumer products from regulation of hazardous materials, as provided.	05/25/2022 - In ASSEMBLY. Read third time and amended. To third reading.
<u>AB 2061</u> Ting (D)	Transportation Electrification: Electric Vehicle Charge		Requires an entity that receives an incentive funded by a state agency or through a charge on ratepayers to install, own, or operate a charging station, in whole or in part, to report charging station uptime, as defined, to the Energy Commission. Requires the Energy Commission, as part of the assessment of the investment	05/19/2022 - In ASSEMBLY. Read second time. To third reading.

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			plan for the Clean Transportation Program, to assess the uptime of public- and ratepayer-funded charging station infrastructure.	
<u>AB 2063</u> Berman (D)	Density Bonuses: Affordable Housing Impact Fees		Prohibits affordable housing impact fees, including inclusionary zoning fees and in-lieu fees, from being imposed on a housing development' s density bonus units, unless the city, county, or city and county has adopted a local density bonus ordinance or established a local housing program on or before specified date, that allows for a density bonus of at least 50% for any for-sale or rental housing development containing restricted affordable units.	04/21/2022 - In ASSEMBLY. Read second time and amended. Re-referred to Committee on APPROPRIATIONS.
<u>AB 2075</u> Ting (D)	Energy: Electric Vehicle Charging Standards		Specifies the State Energy Resources Conservation and Development Commission (Energy Commission) is an interested party that the California Building Standards Commission and the Department of Housing and Community Development are required to consult with in proposing and adopting those standards.	05/12/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 2076</u> Rivas (D)	Extreme Heat and Community Resilience Program		Requires the Department of Public Health to establish and maintain the Extreme Heat and Health Reporting System, a syndromic surveillance system, to receive notice and data from local health departments, clinics, emergency rooms, hospitals, and other sources on illnesses, including emergency room visits, and deaths resulting from exposure to extreme heat, as specified.	05/25/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2078</u> Flora (R)	Atmospheric Rivers: Research, Mitigation, and Climate	SUPPORT	Renames the Atmospheric Rivers: Research, Mitigation, and Climate Forecasting Program in the Department of Water Resources to the Atmospheric Rivers Research and Forecast Improvement Program: Enabling Climate Adaptation Through Forecast-Informed Reservoir Operations and Hazard Resiliency (AR/FIRO) Program.	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>AB 2088</u> Cooper (D)	California Pilot Paid Internship Program		Establishes California Pilot Paid Internship Program in the Department of Education to help prepare thousands of pupils for high-skill jobs of the future in engineering, health care,	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.

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			mathematics, manufacturing, science, teaching, and technology. Appropriates a specified amount from the General Fund to the department to provide technical assistance to, and allocate grant funds to, school districts, charter schools, and county offices of education that establish or expand existing local internship programs.	
<u>AB 2106</u> Rivas R (D)	Water Quality: Permits		Requires, on or before specified date, the state board to modernize its stormwater data collection systems through specified actions. Requires, on or before specified date, the state board to initiate a series of board hearings to evaluate the California stormwater program and the state's progress towards attainment of beneficial uses and compliance with water quality standards as they pertain to permits issued pursuant to the federal Clean Water Act.	05/25/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2108</u> Rivas R (D)	Disadvantaged and Tribal Communities		Requires the state board and each regional board, contingent upon an appropriation, to hire environmental justice and tribal community coordinator positions for specified purposes. Requires the state board, contingent upon an appropriation, to establish a community capacity -building stipend program to promote meaningful civic engagement by disadvantaged communities and tribal communities in the state board and regional board decisionmaking processes, among other activities.	05/25/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2110</u> Flora (R)	Alternative Workweek Schedule: Election Results: Report		Requires a report concerning elections for alternative workweek reporting by the employer to be provided within 15 days.	02/24/2022 - To ASSEMBLY Committee on LABOR AND EMPLOYMENT.
<u>AB 2112</u> Nguyen J (R)	Regulations: Economic Impact Report		Requires the Legislative Analysts Office to analyze regulations enacted on or after January 1, 2016, to December 31, 2022, inclusive, that affect the states economic supply chain and the transportation of goods and submit a report of its findings to the Legislature by January 1, 2024.	03/03/2022 - To ASSEMBLY Committees on ACCOUNTABILITY AND ADMINISTRATIVE REVIEW and JOBS, ECONOMIC DEVELOPMENT AND THE ECONOMY.

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Bill No. Author	Title	IRWD Position	Summary/Effects	Status
<u>AB 2113</u> Rivas R (D)	State Water Pollution Cleanup and Abatement Account		Creates within the Waste Discharge Permit Fund the Waterway Recovery Account, the Citizen Monitoring Account, the Community Capacity Building Account, and the Stormwater Innovation Account, and, subject to future legislation, would annually transfer from the annual proceeds of the State Water Pollution Cleanup and Abatement Account, subject to a future legislative act, specified amounts.	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>AB 2133</u> Medina (D)	Wages: Final Payments		Regulates the terms and conditions of employment, and, specifically, the payment of wages. Reduces the time limit on the payment of wages, as described above, to 48 hours.	05/16/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2135</u> Irwin (D)	Information Security		Requires state agencies to adopt and implement information security and privacy policies, standards, and procedures based upon standards issued by the National Institute of Standards and Technology and the Federal Information Processing Standards. Requires to certify, to the President pro Tempore of the Senate and the Speaker of the Assembly that the agency is in compliance with all adopted policies, standards, and procedures and to include a plan of action and milestones.	05/25/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2136</u> Cunningham (R)	Construction Contract Payments: Website Posting		Relates to existing law, the State Contract Act, which requires a state agency that maintains an internet website to post specified information relating to construction contracts within 10 days of making a construction contract payment. The bill increases the number of days within which a state agency is required to post the information to its internet website from 10 to 15 days.	02/24/2022 - To ASSEMBLY Committee on ACCOUNTABILITY AND ADMINISTRATIVE REVIEW.
<u>AB 2140</u> Muratsuchi (D)	Once Through Cooling Policy: Powerplants		Prohibits the state board from granting an operator of a powerplant any extension of time to comply with the once-through cooling policy if the city or county that has jurisdiction over the site of the powerplant formally adopts a resolution objecting to the extension and a specified advisory committee convened by the state board	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.

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			determines that the extension is not necessary to ensure electricity reliability.	
<u>AB 2141</u> Garcia E (D)	Greenhouse Gas Reduction Fund: Community Projects		Appropriates to the state board, beginning in the 2023-24 fiscal year, 20 percent of the annual proceeds of the Greenhouse Gas Reduction Fund, up to specified amount, for allocation to air pollution control districts and air quality management districts for the purpose of supporting community emissions reduction strategies in, and reimbursement for participation by, communities selected by the state board, as specified.	05/23/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2142</u> Gabriel (D)	Income Taxes: Exclusion: Turf Replacement Program	SUPPORT	Includes additional information required for any bill authorizing a new tax expenditure, and would require the Department of Finance to include an analysis of these expenditures in its annual tax expenditure report provided to the Legislature.	05/25/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2143</u> Carrillo (D)	Net Energy Metering		Applies those public works project requirements to the construction of any renewable electrical generation facility, and any associated battery storage, after a specified date, that receives service pursuant to the 2nd standard contract or tariff, except a residential facility that will have a maximum generating capacity of specified kilowatts or less of electricity.	05/19/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 2146</u> Bauer-Kahan (D)	Neonicotinoid Pesticides: Prohibited Nonagricultural		Prohibits, beginning specified date, the sale, possession, or use of neonicotinoid pesticides, as defined, except for use on an agricultural commodity. Authorizes the director, in consultation with the Department of Food and Agriculture, to authorize, by written order, the sale, possession, or use of these prohibited pesticides if the director finds that it would address a valid environmental emergency and there are no other, less harmful alternatives, as specified.	05/23/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.

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Bill No. Author	Title	IRWD Position	Summary/Effects	Status
<u>AB 2148</u> Calderon (D)	Workers' Compensation: Disability Payments		Extends the authorization to deposit indemnity payments in a prepaid card account until a specified date.	05/12/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2154</u> Cooley (D)	California Insurance Guarantee Association		Authorizes the California Insurance Guarantee Association to levy an assessment on member insurers writing homeowners' and automobile insurance and other insurance to pay the principal of, and interest on, the bonds issued for that claims category, which would be recouped through a surcharge on applicable policies. Imposes a tax. Specifies that obligations under a policy issued to cover cyber security are covered claims, as long as CIGA's total liability does not exceed \$1,000,000 or the policy limits.	05/12/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2173</u> Petrie-Norris (D)	Public Contracts: Payment		Extends indefinitely existing law which authorizes the retention proceeds withheld from any payment by an awarding entity from the original contractor, by the original contractor from any subcontractor, and by a subcontractor from any subcontractor, to exceed 5% on specific projects where the director of the applicable department has made, or the governing body of the public entity or designated official of the public entity has approved, a finding prior to the bid that the project is complex.	05/11/2022 - To SENATE Committee on GOVERNMENTAL ORGANIZATION.
<u>AB 2177</u> Irwin (D)	Coastal Recreation: Designated State Surfing Reserves		Requires, on or before specified date, the State Coastal Conservancy to establish criteria and an application process for purposes of designating an area of the coastline as a state surfing reserve, as defined. Requires the local government to include in its application, among other things, a description of the proposed surfing reserve.	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>AB 2184</u> Wicks (D)	Unemployment Insurance: Benefits: Eligibility		Prohibits an unemployed individual who is otherwise eligible for unemployment compensation benefits from being deemed ineligible, and would require that individual to be considered as being able to and available for work, for any week in which the individual meets any of certain conditions, including if the claimant	03/31/2022 - To ASSEMBLY Committee on INSURANCE.;03/31/2022 - From ASSEMBLY Committee on INSURANCE with author's amendments.;03/31/2022 - In

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			is available exclusively for telework for which the claimant is reasonably fitted. Appropriates funds.	ASSEMBLY. Read second time and amended. Re-referred to Committee on INSURANCE.
<u>AB 2186</u> Grayson (D)	Housing Cost Reduction Incentive Program		Establishes the Housing Cost Reduction Incentive Program, to be administered by the department, for the purpose of reimbursing cities, counties, and cities and counties for development impact fee reductions provided to qualified housing developments. Requires a public entity that receives grant funds under the program to use those funds solely for those purposes for which the development impact fee that was reduced or deferred would have been used.	05/23/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2188</u> Quirk (D)	Discrimination in Employment: Use of Cannabis		Makes it unlawful for an employer to discriminate against a person in hiring, termination, or any term or condition of employment, or otherwise penalize a person, if the discrimination is based upon the person's use of cannabis off the job and away from the workplace or upon an employer-required drug screening test that has found the person to have non-psychoactive cannabis metabolites in their urine, hair, or bodily fluids.	05/19/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 2201</u> Bennett (D)	Groundwater Sustainability Agency: Groundwater Extract		Prohibits a local agency, as defined, from approving a permit for a new groundwater well or for an alteration to an existing well in a basin subject to the act and classified as medium- or high-priority until it obtains a written verification, from the groundwater sustainability agency that manages the basin or area of the basin where the well is proposed to be located, determining that certain factors are present.	05/23/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2203</u> Rivas (D)	Fair Employment and Housing Protections: Credit Reports		Prohibits requiring a consumer credit report as part of the application process for a rental housing accommodation in instances where there is a government rent subsidy.	05/19/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 2206</u> Lee (D)	Nonattainment Basins: Employee Parking		Revises the definitions of "employer," "parking cash-out program," and "parking subsidy." Requires a lessor that enters into or renews a lease on or after specified date, with a lessee that is an	05/09/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.

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			employer and that offers parking to the employer to list the market-rate parking costs as a separate line item in the lease, as provided, or to provide a list of parking costs to the employer within 30 days after the lease is entered into or renewed.	
<u>AB 2208</u> Kalra (D)	Fluorescent Lamps: Sale and Distribution: Prohibition		Prohibits on and after specified date, a compact fluorescent lamp, as defined, and, on and after specified date, a linear fluorescent lamp, as defined, from being offered for final sale, sold at final sale, or distributed in this state as a new manufactured product.	05/18/2022 - To SENATE Committee on ENVIRONMENTAL QUALITY.
<u>AB 2212</u> Gallagher (R)	California Emergency Services Act: State of Emergency		Authorizes the Governor to exercise within the area designated all executive power vested in the state by the Constitution and laws of the state to effectuate the purposes of the California Emergency Services Act (CESA).	03/03/2022 - To ASSEMBLY Committee on EMERGENCY MANAGEMENT.
<u>AB 2219</u> Smith T (R)	State Air Resources Board: Members		Relates to State Air Resources Board members. Requires on and after January 1, 2025, the member appointed by the Senate Committee on Rules to also be a person who represents a small business that employs fewer than 50 full-time employees.	04/04/2022 - In ASSEMBLY Committee on NATURAL RESOURCES: Failed passage.
<u>AB 2221</u> Quirk-Silva (D)	Accessory Dwelling Units		Requires a permitting agency to act on an application to serve an accessory dwelling unit or a junior accessory dwelling unit within the same timeframes. Provides that the requirement for a permitting agency to act on an application means either to return in writing a full set of comments to the applicant with a comprehensive request for revisions or to return the approved permit application.	05/25/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2225</u> Ward (D)	Conservation and Management Of Lands		Requires the Natural Resources Agency no later than January 1, 2024, to conduct regional workshops with Native American tribes across the state to solicit the input, priorities, and concerns of Native American tribes regarding of Native American tribes traditional ecological knowledge, as defined.	05/25/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.

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<u>AB 2233</u> Quirk-Silva (D)	Excess State Land: Development of Affordable Housing		Requires the Department of General Services to develop, no later than specified date, a set of criteria to consistently evaluate state owned parcels for suitability as affordable housing sites. Requires, on or before specified date, and every certain years thereafter, the Department of General Services to, among other things, conduct a review of all state owned property and identify state owned parcels that are potentially viable for affordable housing based on those criteria.	05/23/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2234</u> Rivas R (D)	Planning and Zoning: Housing: Postentitlement Phase		Requires a local agency to compile a list of information needed to approve or deny a postentitlement phase permit, as defined, to post an example of an ideal application and an example of an ideal complete set of postentitlement phase permits for the most common housing development projects in the jurisdiction, and to make those items available to all applicants for these permits no later than a specified date.	05/25/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2238</u> Rivas (D)	Extreme Heat: Statewide Extreme Heat Ranking System		Requires the agency, by January 1, 2024, to develop a statewide extreme heat ranking system in coordination with ICARP and the Department of Insurance, as provided. Requires the department, by January 1, 2024, to submit a study of the insured and uninsured costs related to past extreme heat events to the appropriate legislative policy and budget committees, the agency, and ICARP.	05/23/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2243</u> Garcia E (D)	Occupational Safety and Health Standards: Heat Illness		Requires the Division of Occupational Safety and Health to submit to the standards board a rulemaking proposal to consider revising the heat illness standard to include an ultrahigh heat standard for employees in outdoor places of employment for heat in excess of 105 degrees Fahrenheit, as prescribed, and require employers to distribute copies of the Heat Illness Prevention Plan, as provided.	05/23/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 2247</u> Bloom (D)	Perfluoroalkyl and Polyfluoroalkyl Substances (PFAS)		Requires, as part of the hazardous waste control laws, the Department of Toxic Substances Control to work with the Interstate Chemicals Clearinghouse to establish, on or before specified date, a	05/23/2022 - In ASSEMBLY. Read second time. To third reading.

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			publicly accessible reporting platform to collect information about perfluoroalkyl and polyfluoroalkyl substances (PFAS) and products or product components containing intentionally added PFAS, as defined, being sold, offered for sale, distributed, or offered for promotional purposes in, or imported into, the state.	
<u>AB 2248</u> Garcia E (D)	Water Quality: California Mexico Cross Border Rivers		Makes a specified sum available from the General Fund, upon appropriation by the Legislature in the annual Budget Act or another statute, to the Environmental Protection Agency to address water quality problems arising in the rivers that come across the border from Mexico. Makes a specified sum available for purposes consistent with the New River Water Quality, Public Health, and River Parkway Development Program and a sum available for purposes consistent with water quality projects for the Tijuana River.	05/23/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2260</u> Rodriguez (D)	Emergency Response: Trauma Kits		Defines trauma kit to mean a first aid response kit that contains specified items, including, among other things, a tourniquet. Allows medical materials and equipment and any additional items that are approved by local law enforcement or first responders to be included as supplements in addition to the specified items that are required to be included in a trauma kit if they adequately treat a traumatic injury and can be stored in a readily available kit.	05/25/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2278</u> Kalra (D)	Natural Resources: Biodiversity and Conservation Report		Requires the Secretary of the Natural Resources Agency to prepare and submit, beginning on or before a specified date, an annual report to the Legislature on the progress toward achieving the directives of the executive order.	05/23/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2297</u> Wicks (D)	Tenancy: Fee in Lieu of a Security Deposit		Requires a landlord who offers a tenant or prospective tenant the option of paying a fee in lieu of a security deposit to take certain action, including offer the tenant or prospective tenant the option to instead pay a security deposit. Authorizes a tenant who accepts an	03/03/2022 - To ASSEMBLY Committee on JUDICIARY.

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			offer to pay a fee in lieu of a security deposit to terminate the agreement to pay the fee in lieu of a security deposit at any time.	
AB 2308 Kiley (R)	Information Practices Act of 1977: Commercial Purposes		Relates to the Information Practices Act of 1977, which prescribes a set of requirements, prohibitions, and remedies applicable to certain state agencies with regard to their collection, storage, and disclosure of personal information. Revises the definition of commercial purpose to instead mean any purpose that has financial gain as an objective.	03/03/2022 - To ASSEMBLY Committee on PRIVACY AND CONSUMER PROTECTION.
AB 2313 Bloom (D)	Water: Judges and Adjudications		Authorizes, within 30 days after at least one defendant or respondent has been served in an action relating to water, any party to file a noticed motion for that case to be assigned to a judge who has participated in that training program, subject to prescribed procedures.	05/23/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
AB 2316 Ward (D)	Public Utilities Commission: Community Renewable Energy		Requires the commission, on or before specified date establish a community renewable energy program, and require that the program comply with specified photovoltaic requirements, ensure at least 51% of its subscribers are low-income customers or low-income service organizations, minimize impacts to nonsubscriber ratepayers, and provide bill credits to subscribers.	05/23/2022 - In ASSEMBLY. Read second time. To third reading.
AB 2319 Bonta M (D)	Surplus Land: Former Military Base Land		Adds to the definition of exempt surplus land, land that is a former military base conveyed by the federal government to a local agency, is subject to certain provisions governing the Alameda Naval Air Station and the Fleet Industrial Supply Center, and meets other specified conditions.	05/25/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
AB 2334 Wicks (D)	Density Bonus Law: Affordability: Incentives		Requires the rent for the remaining units in the development be set at an amount consistent with the maximum rent levels for lower income households, as those rents and incomes are determined by California Tax Credit Allocation Committee. Regards to the enforcement of equity sharing agreements for for sale units, would	05/19/2022 - In ASSEMBLY. Read second time. To third reading.

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			also permit the local government to defer to the recapture provisions of the public funding source. Makes a technical change to the Density Bonus Law by deleting duplicative provisions.	
<u>AB 2357</u> Ting (D)	Surplus Land	OPPOSE UNLESS AMENDED	Relates to exempt surplus land and certain legal restrictions that would make housing prohibited. Requires that those legal restrictions be documented and verified in writing by the relevant agencies that have authority relating to the restrictions.	05/25/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2362</u> Mullin (D)	Publicly and Environmentally Beneficial Projects		Requires the Natural Resources Agency, on or before July 1, 2023, to evaluate existing state interagency collaborations functioning at the regional level to gain applicant and agency staff perspective on process and outcome efficiencies for issuing permits for proposed environmentally beneficial projects, as defined.	05/23/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 2370</u> Levine (D)	Public Records: State Agency Retention		Requires by statute or regulation, or established by the Secretary of State pursuant to the State Records Management Act, require a state agency, for purposes of the California Public Records Act, to retain and preserve for at least 2 years every public record, as defined, regardless of physical form or characteristics.	05/23/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2377</u> Muratsuchi (D)	Fire Prevention: Deputy Director of Community Wildfire		Expands the deputy director's responsibilities to include, among other things, prioritizing acres for fire and fuels treatment and executing those treatments.	05/25/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2383</u> Jones-Sawyer (D)	Rental Housing Unlawful Housing Practices: Applications		Makes it an unlawful housing practice for the owner of a rental housing accommodation, or another individual or business establishment, to inquire about, or require an applicant for a rental housing accommodation to disclose, or to otherwise seek, consider, use, or take adverse action on, criminal history information, as defined, during the initial application assessment phase, unless otherwise required by state or federal law.	05/19/2022 - In ASSEMBLY. Read second time. To third reading.

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<u>AB 2387</u> Garcia E (D)	Safe Drinking Water, Wildfire Prevention, Drought		Enacts the Safe Drinking Water, Wildfire Prevention, Drought Preparation, Flood Protection, Extreme Heat Mitigation, and Workforce Development Bond Act of 2022, which, if approved by the voters, would authorize the issuance of bonds in the amount of \$7,430,000,000 pursuant to the State General Obligation Bond Law to finance projects for safe drinking water, wildfire prevention, drought preparation, flood protection, extreme heat mitigation, and workforce development programs.	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>AB 2412</u> Villapudua (D)	Agriculture: State Water Efficiency Program		Requires the Department of Food and Agriculture, upon appropriation by the Legislature of additional funds, to administer the State Water Efficiency and Enhancement Program to provide grants to agricultural operations to implement irrigation, water reclamation, water storage, or groundwater recharge systems that reduce greenhouse gases and energy use and increase water use efficiency.	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>AB 2419</u> Bryan (D)	Environmental Justice: Federal Infrastructure		Requires a minimum of 40 percent of funds received by the state under the IIJA and certain other federal funds to be allocated to projects that provide direct benefits to disadvantaged communities and, except as specified, a minimum of an additional 10 percent be allocated for projects that provide direct benefits to low-income households and low-income communities, as provided.	05/23/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 2421</u> Rubio (D)	Water: Unlicensed Cannabis Cultivation		Relates to law that makes it unlawful to deposit, permit to pass, or place where it can pass, specified pollutants into the waters of this state, including any substance or material deleterious to fish, plant life, mammals, or bird life. Provides that the specified affirmative defense to a violation of the criminal provision does not apply in any other civil action that alleges a violation resulting from unlicensed cannabis cultivation.	05/19/2022 - In ASSEMBLY. Read second time. To third reading.

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<u>AB 2428</u> Ramos (D)	Mitigation Fee Act: Fees for Improvements: Timeline		Requires a local agency that requires a qualified applicant to deposit fees for improvements, as described, into an escrow account as a condition for receiving a conditional use permit or equivalent development permit to expend the fees within 5 years of the deposit. The bill would require any fees not expended within this period to be returned to the qualified applicant.	03/03/2022 - To ASSEMBLY Committees on LOCAL GOVERNMENT and HOUSING AND COMMUNITY DEVELOPMENT.
<u>AB 2449</u> Rubio (D)	Open Meetings: Local Agencies: Teleconferences		Authorizes a local agency to use teleconferencing without complying with those specified teleconferencing requirements in specified circumstances when a declared state of emergency is in effect, or in other situations related to public health. Imposes prescribed requirements for this exception relating to notice, agendas, the means and manner of access, and procedures for disruptions.	05/23/2022 - In ASSEMBLY. ASSEMBLY Rule 69(b) suspended.;05/23/2022 - In ASSEMBLY. Read third time and amended. To third reading.
<u>AB 2451</u> Wood (D)	State Water Resources Control Board: Drought Planning		Requires the state board to establish a Drought Section within the Division of Water Rights. Requires the state board, in consultation with the Department of Fish and Wildlife, to adopt principles and guidelines for diversion and use of water in coastal watersheds during times of water shortage for drought preparedness and climate resiliency.	05/23/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 2454</u> Jones-Sawyer (D)	Public Contracts: Protests: Joint Labor-Management		Authorizes a joint labor-management committee, as defined, to submit a written protest to a contract that is not to be awarded to the lowest bidder.	05/25/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2463</u> Lee (D)	Public Works: Exemption		Relates to existing law defines "public works," for purposes of regulating public works contracts, as, among other things, construction, alteration, demolition, installation, or repair work that is performed under contract and paid for in whole or in part out of public funds. Relates to pursuant to existing law, all workers employed on public works projects are required to be paid not less than the general prevailing rate of per diem wages for work, except as specified.	05/18/2022 - To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

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<u>AB 2469</u> Wicks (D)	Housing: Statewide Rental Registry		Requires the department to develop and maintain a rental registry online portal designed to collect specified information related to housing and make that information available to the public. Requires the department to develop a rental registry form to collect information from landlords, as defined, including the address and owners of a rental property, the number and type of rooms in the rental property, and information related to the payments collected and the duration of tenancies.	04/20/2022 - In ASSEMBLY Committee on HOUSING AND COMMUNITY DEVELOPMENT: Not heard.
<u>AB 2479</u> Wood (D)	Forest Restoration and Protection: Wildfire Prevention		Requires the Department of Forestry and Fire Protection, on or before specified date, to provide to the relevant policy and fiscal committees of the Legislature a report that details how the department will increasingly implement prescribed burn projects to burn at least a specified number of acres annually by specified date, and how the state, by specified date, will increasingly use, develop, implement, facilitate, and support prescribed burn, cultural fire, and managed wildfire projects.	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>AB 2486</u> Gabriel (D)	California Privacy Rights Act of 2020		Creates, in the California Privacy Protection Agency (CPPA), the Office for the Protection of Children Online for the purpose of ensuring that digital media available to children in this state are designed, provided, and accessed in a manner that duly protects the privacy, civil liberties, and mental and physical well-being of children, as prescribed.	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>AB 2488</u> Irwin (D)	Personal Information: Precise Geolocation Data		Grants a consumer various rights with respect to personal information, as defined, that is collected or sold by a business, as defined, including the right to direct a business that sells personal information about the consumer to third parties not to sell the consumer's personal information, including geolocation data.	04/19/2022 - In ASSEMBLY Committee on PRIVACY AND CONSUMER PROTECTION: Not Heard.

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<u>AB 2503</u> Garcia (D)	Landlords and Tenants: California Law Revision		Requires the California Law Revision Commission to, on or before specified date, deliver to the Legislature a study regarding, among other things, the establishment of consistent terminology across the California codes to describe the parties to an agreement, lease, or other contract for the rental of residential real property, including in mobilehome parks, that meets certain criteria, specifically, among other things, that the study addresses whether the continued use of the terms landlord and tenant.	05/23/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2505</u> Gray (D)	Water Theft: Irrigation Districts		Authorizes irrigation districts, as defined, to impose fines or penalties for water theft in accordance with both of the above-described provisions, and would provide that the above-specified provisions do not cap or limit the fines that an irrigation district may impose in accordance with the Irrigation District Law.	05/24/2022 - To SENATE Committee on GOVERNANCE AND FINANCE.
<u>AB 2527</u> Quirk-Silva (D)	Consumer Credit Reporting Agencies Act		Prohibits a person from using a consumer credit report for a purpose related to the hiring of a dwelling unit or requiring an applicant or tenant to answer a question about the contents of a consumer credit report or the information contained therein for a purpose related to the hiring of a dwelling unit, except if the person is required to do so under state or federal law, as prescribed.	02/17/2022 - INTRODUCED.
<u>AB 2536</u> Grayson (D)	Development Fees: Impact Fee Nexus Studies	WATCH	Requires a local agency, prior to levying a new fee or capacity charge or approving an increase in an existing fee or capacity charge, to evaluate the amount of the fee or capacity charge. Requires the evaluation to include evidence to support that the fee or capacity charge does not exceed the estimated reasonable cost of providing service, as specified. Requires all information constituting the evaluation to be made publicly available at least 14 days prior to a specified meeting.	05/16/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2538</u> Rivas R (D)	State Warning Center: Wildfire Smoke Notification		Requires the Office of Emergency Services and the Department of Forestry and Fire Protection to jointly establish and lead the	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.

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			Wildfire Forecast and Threat Intelligence Integration Center, comprised of representatives from specified state and other entities.	
<u>AB 2539</u> Choi (R)	Public Health: COVID-19 Vaccination: Proof of Status		Requires a public or private entity that requires a member of the public to provide documentation regarding the individuals vaccination status for any COVID-19 vaccine as a condition of receipt of any service or entrance to any place to accept a written medical record or government-issued digital medical record in satisfaction of the condition, as specified.	02/17/2022 - INTRODUCED.
<u>AB 2550</u> Arambula (D)	State Air Resources Board: San Joaquin Valley Air		Requires the state board, if the San Joaquin Valley Air Pollution Control District does not receive a determination of attainment from the United States Environmental Protection Agency for a national ambient air quality standard established by the agency pursuant to the federal Clean Air Act by the applicable attainment date for that standard, to undertake certain activities and enforcement practices that impact the district's ability to attain and maintain that ambient air quality standard.	05/19/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 2556</u> O'Donnell (D)	Local Public Employee Organizations		Revises, under the Meyers-Miliias-Brown Act, specified timeframe to no earlier than 15 days after the factfinders written findings of fact and recommended terms of settlement have been submitted to the parties.	05/18/2022 - To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
<u>AB 2559</u> Ward (D)	Reusable Tenant Screening Reports		Requires a landlord who elects to accept reusable tenant screening reports to provide an applicant with prescribed notice, including a clear and conspicuous statement on a listing or advertisement for residential rental property on the internet, that the landlord accepts reusable tenant screening reports. Defines the term reusable tenant screening report.	05/16/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2563</u> Quirk (D)	Air Pollution: Permits: Mobile Fueling On Demand Tank		Requires air pollution control and air quality management districts to establish a mobile fueling on demand tank vehicle permit program for mobile fueling on demand tank vehicle operations, as	05/19/2022 - In ASSEMBLY. Joint Rule 62(a) suspended.;05/19/2022 - In ASSEMBLY Committee on

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			defined. Requires that a mobile fueling on demand tank vehicle permit program provide, among other things, a consistent permitting process for an operation that requires more than one permit and an expedited permit review and fee schedule.	APPROPRIATIONS: Held in committee.
<u>AB 2582</u> Bennett (D)	Recall Elections: Local Offices		Requires a recall election for a local officer to include only the question of whether the officer sought to be recalled shall be removed from office. Provides that if a local officer is removed from office in a recall election, the bill would provide that the office is vacant until it is filled according to law.	05/12/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2593</u> Boerner Horvath (D)	Coastal Resources: Coastal Development Permits		Requires the Coastal Commission to require a project that impacts coastal wetland, intertidal, or marine habitats or ecosystems seeking a coastal development permit to mitigate greenhouse gas emissions by building or contributing to a blue carbon project, as defined.	05/11/2022 - To SENATE Committee on NATURAL RESOURCES AND WATER.
<u>AB 2605</u> Villapudua (D)	Water Quality: State Certification		Authorizes the State Water Resources Control Board to delegate its authority regarding the issuance of a certificate or statement regarding water quality standards to the regional boards. Requires a project proponent, as defined, to request a pre-filing meeting with the state board.	04/18/2022 - From ASSEMBLY Committee on ENVIRONMENTAL SAFETY AND TOXIC MATERIALS with author's amendments.;04/18/2022 - In ASSEMBLY. Read second time and amended. Re-referred to Committee on ENVIRONMENTAL SAFETY AND TOXIC MATERIALS.
<u>AB 2610</u> Friedman (D)	Wildlife Conservation Board:		Expresses the intent of the Legislature to encourage ecologically sensitive vegetation management practices for the purpose of maintaining ecological health and strengthening biodiversity while mitigating wildfire risk through fuel load reduction.	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>AB 2631</u> O'Donnell (D)	Government Claims Act		Provides that a public entity is liable for injury relating to the effects of that public entity's homelessness policies on another public entity.	03/10/2022 - To ASSEMBLY Committees on LOCAL GOVERNMENT and JUDICIARY.

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Bill No. Author	Title	IRWD Position	Summary/Effects	Status
<u>AB 2638</u> Bloom (D)	School Facilities: Drinking Water: Filling Stations		Requires a new construction or modernization project submitted to the Division of the State Architect by a school district or the governing body of a charter school to include water bottle filling stations, as specified. Requires, for modernization projects, a minimum of one water bottle filling station for each school undergoing modernization, and for new construction projects, a minimum of one water bottle filling station per 350 people at each school being constructed.	05/23/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2639</u> Quirk (D)	San Francisco Bay Sacramento San Joaquin Delta Estuary		Requires the state board, on or before a specified date, to adopt a final update of the 1995 Water Quality Control Plan for the San Francisco Bay and or Sacramento San Joaquin Delta Estuary, as specified, and to implement the amendments to the plan adopted by the state board pursuant to Resolution No. 2018-0059 on a specified date.	05/19/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 2647</u> Levine (D)	Local Government: Open Meetings		Requires a local agency to make those writings distributed to the members of the governing board available for public inspection at a public office or location that the agency designates and list the address of the office or location on the agenda for all meetings of the legislative body of the agency unless the local agency meets certain requirements, including the local agency immediately posts the writings on the local agency's internet website in a position and manner that makes it clear.	05/12/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2649</u> Garcia (D)	Natural Carbon Sequestration and Resilience Act of 2022		Declares the policy of the state to achieve a goal of removing at least 60,000,000 metric tons of carbon dioxide equivalent annually on or before specified date, and 75,000,000 metric tons of carbon dioxide equivalent annually on or before specified date, through the implementation of natural carbon sequestration actions and programs on natural, working, and urban lands.	05/23/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.

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Bill No. Author	Title	IRWD Position	Summary/Effects	Status
<u>AB 2667</u> Friedman (D)	Integrated Distributed Energy Resources Fund		Establishes the Integrated Distributed Energy Resources Fund as a special fund in the State Treasury, the moneys in which would be available to the Energy Commission, upon appropriation by the Legislature, for purposes of the bill. Requires the Energy Commission to administer the fund in consultation with the Public Utilities Commission and the State Air Resources Board to provide incentives for eligible resources to support statewide customer adoption of clean distributed energy resources, as specified.	05/23/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2672</u> Flora (R)	Public Resources Code: Fire Prevention		Authorizes the Director of Forestry and Fire Protection, on or before specified date, using existing specified funds, to procure or establish a statewide defensible space and home hardening platform that would allow property owners to support and augment the Department of Forestry and Fire Protection in defensible space inspection requests, as provided. Subjects a property owner to a specified civil penalty if the property owner takes specified actions.	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>AB 2674</u> Villapudua (D)	California Global Warming Solutions Act of 2006		Requires the State Air Resources Board to recognize as a method to generate credits under the Low Carbon Fuel Standard regulations the use of renewable natural gas or biogas by a source that the state board determines to directly reduce the emissions of methane in the state and that both displaces the existing use of natural gas and reduces the carbon intensity of fuels, as specified.	04/18/2022 - From ASSEMBLY Committee on NATURAL RESOURCES with author's amendments.;04/18/2022 - In ASSEMBLY. Read second time and amended. Re-referred to Committee on NATURAL RESOURCES.
<u>AB 2677</u> Gabriel (D)	Information Practices Act of 1977		Recasts those provisions to include, among other things, genetic information, IP address, online browsing history, and location information within the definition of " personal information" for the act' s purposes. Makes other technical, nonsubstantive, and conforming changes.	05/23/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 2693</u> Reyes (D)	COVID-19: Exposure		Extends provisions of the Occupational Safety and Health Act concerning exposure to the risk of infection with Coronavirus 2019. Provides that certain workplace industry information received from	05/23/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.

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Bill No. Author	Title	IRWD Position	Summary/Effects	Status
			local public health departments shall be made available on available on a website.	
<u>AB 2695</u> Berman (D)	Statewide Cybersecurity Strategy		Requires the statewide cybersecurity strategy to increase opportunities to meet the cybersecurity workforce demand.	05/19/2022 - In ASSEMBLY. Joint Rule 62(a) suspended.;05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>AB 2713</u> Wicks (D)	Tenant Protections: Just Cause Termination: Rent Caps		Revises the intent to occupy just cause provision pertaining to terminating a tenancy to mean a good faith intent to occupy the residential real property by the owner or the owner's spouse, domestic partner, children, grandchildren, parents, or grandparents for at least 3 consecutive years. Prohibits an owner from terminating a tenancy under that provision if the same owner or relative already occupies a unit on the residential real property or if there is a vacancy on the residential real property.	04/20/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 2734</u> Petrie-Norris (D)	Coastal Resources: Research: Landslides, Erosion		Requires the Scripps Institution of Oceanography at the University of California, San Diego, to conduct research on coastal cliff landslides, flooding, and erosion in the County of Orange, as provided.	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: To Suspend File.;05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>AB 2740</u> Dahle M (R)	Water Resources: Desalination		Repeals existing law requiring the Department of Water Resources to report to the Legislature, on potential opportunities and impediments for using seawater and brackish water desalination and to convene a Water Desalination Task Force.	03/17/2022 - To ASSEMBLY Committee on WATER, PARKS AND WILDLIFE.
<u>AB 2742</u> Friedman (D)	Water Meters: Urban Water Suppliers		Delays a specified requirement for an urban water supplier to install the water meters to on or before January 1, 2030.	02/18/2022 - INTRODUCED.
<u>AB 2757</u> Dahle M (R)	Wildlife Resources: Natural Community Conservation Plan		Requires draft documents associated with a natural community conservation plan and preliminary public review documents to be	03/17/2022 - To ASSEMBLY Committee on WATER, PARKS AND WILDLIFE.

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			posted on the plan lead agency's internet website within the timeframes described in existing law.	
<u>AB 2780</u> Arambula (D)	Enhanced Infrastructure Financing Districts		Authorizes the City of Selma to initiate, participate in, govern, or finance an enhanced infrastructure financing district if specified events have occurred, except the requirement to have received a finding of completion, and if the City of Selma, acting as the successor agency or entity to the former Selma Redevelopment Agency, is in compliance with a settlement agreement it has entered into with the state to resolve any redevelopment agency dissolution issues and payments.	05/12/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2782</u> Mayes (R)	Public Employment: Health Benefits and Reimbursement		Prohibits a person who enters into service with the state or any agency, department, authority, or instrumentality of the state or a contracting agency subject to the Public Employees Medical and Hospital Care Act, on or after January 1, 2023, from being reimbursed for, or receiving, any subsidy for health care expenses or coverage after retirement from service, if that the person is eligible to enroll in Part A and Part B of Medicare.	03/17/2022 - To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.
<u>AB 2787</u> Quirk (D)	Microplastics In Products		Provides that on and after specified dates that vary based on the product, ban the sale, distribution in commerce, or offering for promotional purposes in the state of designated products, such as leave on cosmetic products and waxes and polishes, if the products contain intentionally added microplastics. Excludes from this ban products consisting, in whole or in part, of specified substances or mixtures containing microplastics. Provides civil penalty.	05/19/2022 - In ASSEMBLY. Read third time and amended. To third reading.
<u>AB 2788</u> Mathis (R)	Public Records		Relates to existing law that requires each agency, upon a request for a copy of records, within 10 days from receipt of the request, to determine whether the request, in whole or in part, seeks copies of disclosable public records in the possession of the agency and to promptly notify the person making the request of the determination	03/17/2022 - To ASSEMBLY Committee on JUDICIARY.;03/17/2022 - From ASSEMBLY Committee on JUDICIARY with author's amendments.;03/17/2022 - In

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			and the reasons therefor. Extends that 10-day deadline to 10 business days.	ASSEMBLY. Read second time and amended. Re-referred to Committee on JUDICIARY.
<u>AB 2805</u> Bauer-Kahan (D)	Department of Fish and Wildlife: Advance Mitigation		Authorizes the Department of Fish and Wildlife, any other public agency, or federally recognized tribe to propose a regional conservation investment strategy. Eliminates a restriction on the department that authorizes the department to approve a regional conservation investment strategy only if one or more state agencies request specified approval. Requires a regional conservation assessment to be consistent with a federal habitat conservation plan.	05/23/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2811</u> Bennett (D)	Building Standards Commission: Recycled Water	OPPOSE UNLESS AMENDED	Requires commencing a specified date, all newly constructed nonresidential buildings be constructed with dual plumbing to allow the use of recycled water for all applicable nonpotable water demands, as defined, if that building is located within an existing or planned recycled water service area, as specified. Requires the establishment of a program for onsite treated nonpotable water systems.	03/17/2022 - To ASSEMBLY Committee on ENVIRONMENTAL SAFETY AND TOXIC MATERIALS.
<u>AB 2834</u> Kiley (R)	Notaries Public: Certificate Corrections		Authorizes a notary public to correct an error on a certificate under specified circumstances, including that the notary public who makes the correction is the same notary public who originally completed the certificate, the error is in a certificate attached to a grant deed, mortgage, deed of trust, quitclaim deed, security agreement, or other instrument affecting real property that is to be recorded with a county recorder.	05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>AB 2852</u> Bloom (D)	Air Pollution Control Districts and Air Quality		Provides for the establishment of air pollution control districts and air quality management districts. Declares a district a body corporate and politic and a public agency of the state. state, and prescribes the general powers and duties of a district.	03/24/2022 - To ASSEMBLY Committee on LOCAL GOVERNMENT.;03/24/2022 - From ASSEMBLY Committee on LOCAL GOVERNMENT with author's amendments.;03/24/2022 - In

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				ASSEMBLY. Read second time and amended. Re-referred to Committee on LOCAL GOVERNMENT.
<u>AB 2857</u> Bauer-Kahan (D)	Groundwater Sustainability Plans: Domestic Well Impacts		Requires that a groundwater sustainability plan include measures to mitigate adverse impacts on domestic wells, as defined, including, but not limited to, compensating an owner of a domestic well or a user of water from a domestic well for increased energy costs associated with deeper groundwater pumping and increased costs to households associated with the delivery of water from an existing water supply system or alternative water supply.	03/24/2022 - To ASSEMBLY Committee on WATER, PARKS AND WILDLIFE.;03/24/2022 - From ASSEMBLY Committee on WATER, PARKS AND WILDLIFE with author's amendments.;03/24/2022 - In ASSEMBLY. Read second time and amended. Re-referred to Committee on WATER, PARKS
<u>AB 2858</u> Dahle M (R)	Fish and Wildlife: Safe Harbor Agreements		States the intent of the Legislature to enact subsequent legislation that would require safe harbor agreements authorized pursuant to the Safe Harbor Agreement Program Act to be reviewed and either approved and signed, or denied, by the Department of Fish and Wildlife in a specified period of time upon receipt of all documents required by the act.	02/18/2022 - INTRODUCED.
<u>AB 2864</u> Rivas R (D)	Local Government Renewable Energy Self Generation		Increases the statewide specified megawatts limitation to specified megawatts. Authorizes the commission to additionally increase the statewide limitation, as specified, to up to specified megawatts. Requires the commission to conduct an evaluation of the Local Government Renewable Energy Self Generation Program, as specified, and to submit a report of the evaluation to the Legislature on or before a specified date.	05/19/2022 - In ASSEMBLY. Joint Rule 62(a) suspended.;05/19/2022 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>AB 2874</u> Cooley (D)	Fire Prevention: Electrical Utility Facilities		Provides that a person or entity that performs tree trimming or vegetation maintenance services or specialty electrical contracting services under contract to an electrical utility is not liable for any damage or injury that results from a fire ignited by electrical utility facilities, except for damage or injury proximately caused by the contractor' s negligence, gross negligence, or willful misconduct.	03/28/2022 - From ASSEMBLY Committee on UTILITIES AND ENERGY with author's amendments.;03/28/2022 - In ASSEMBLY. Read second time and amended. Re-referred to Committee on UTILITIES AND ENERGY.

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			Provides that for contractors who retain at least a specified amount of fire liability insurance.	
<u>AB 2876</u> Bigelow (R)	Sustainable Groundwater Management Act		Makes nonsubstantive changes to a provision of the Sustainable Groundwater Management Act.	02/18/2022 - INTRODUCED.
<u>AB 2877</u> Garcia E (D)	Safe and Affordable Drinking Water Fund: Tribes		Specifies that a limited waiver of tribal sovereignty is not required for a tribe that is an eligible recipient to access funding from the fund. Requires the state board to work with tribes that are eligible recipients to remove any barriers for those tribes to access funding, as specified. Requires the state board to ensure an equitable distribution of funds from the fund, including funds to eligible recipients that are federally recognized California Native American tribes.	05/23/2022 - In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
<u>AB 2878</u> Aguiar-Curry (D)	Forest Biomass Waste Utilization Program		Establishes the Forest Waste Biomass Utilization Program to be administered by the state board's Joint Institute for Wood Products Innovation to develop an implementation plan to meet the goals and recommendations of specified statewide forest management plans and to develop a workforce training program to complement workforce needs associated with the implementation plan.	05/23/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 2893</u> Daly (D)	Administrative Procedure Act		Relates to the Administrative Procedure Act, which prohibits a state agency from issuing, utilizing, enforcing, or attempting to enforce any guideline, standard of general application, or other rule, among other things, that is a regulation, as defined, unless it has been adopted as a regulation and filed with the Secretary of State. Requires the state agency to update its analysis to reflect any comments received from the Department of Finance.	05/19/2022 - In ASSEMBLY. Read second time. To third reading.
<u>AB 2895</u> Arambula (D)	Water: Permits and Licenses: Temporary Changes		Revises and recasts the provisions regulating temporary changes due to a transfer or exchange of water rights, including, among other revisions, specifying that those provisions apply to a person who proposes a temporary change for purposes of preserving or	05/19/2022 - In ASSEMBLY. Read second time. To third reading.

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			enhancing wetlands habitat, fish and wildlife resources, or recreation. Deletes the requirement that a petitioner publish notice of a petition in a newspaper and would additionally require the petition to include documentation of consultation.	
<u>AB 2919</u> Fong (R)	Release Of Water: Fish Populations		Provides that, notwithstanding any other law, the release of water from a dam shall only be regulated based on actual fish populations and not based on approximate fish populations.	04/26/2022 - In ASSEMBLY Committee on WATER, PARKS AND WILDLIFE: Not heard.
<u>AB 2932</u> Low (D)	Workweek: Hours and Overtime		Requires that work in excess of 32 hours in a workweek be compensated at the rate of no less than 1 1/2 times the employee's regular rate of pay. Requires the compensation rate of pay at 32 hours to reflect the previous compensation rate of pay at 40 hours and would prohibit an employer from reducing an employee's regular rate of pay as a result of this reduced hourly workweek requirement.	03/24/2022 - To ASSEMBLY Committee on LABOR AND EMPLOYMENT.;03/24/2022 - From ASSEMBLY Committee on LABOR AND EMPLOYMENT with author's amendments.;03/24/2022 - In ASSEMBLY. Read second time and amended. Re-referred to Committee on LABOR AND EMPLOYMENT.
<u>AB 2957</u> Local Government Cmt	Local Government: Reorganization		Establishes procedures for determining the exchange of property tax revenues between a city and a county in the case of a jurisdictional change that consists of a city's qualified annexation of unincorporated territory, defined to mean an annexation of unincorporated territory for which an application or resolution was filed on or after January 1, 1998, and on or before January 1, 2021.	05/24/2022 - To SENATE Committee on GOVERNANCE AND FINANCE.
<u>AB 2965</u> Natural Resources Cmt	California Environmental Quality Act: Procedures		Repeals certain obsolete and duplicative provisions from the California Environmental Quality Act (CEQA). Repeals provisions relative to judicial review procedures and administrative reviews of specified Environmental Impact Reports.	05/04/2022 - To SENATE Committee on ENVIRONMENTAL QUALITY.
<u>ACA 1</u> Aguiar-Curry (D)	Local Government Financing: Affordable Housing		Creates an additional exception to the 1% ad valorem tax rate limit on real property that would authorize a city, county, or special district to levy an ad valorem tax to service bonded indebtedness incurred to fund the construction, reconstruction, rehabilitation, or	04/22/2021 - To ASSEMBLY Committees on LOCAL GOVERNMENT and APPROPRIATIONS.

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			replacement of public infrastructure, affordable housing, or permanent supportive housing, if the proposition proposing the tax is approved by 55% of the voters of the city or county, and the proposition includes accountability requirements.	
<u>ACA 13</u> Mathis (R)	Water Infrastructure Projects: Minimum Funding		Requires the Treasurer to annually transfer an amount equal to 2% of all state revenues from the General Fund to the Water Infrastructure Trust Account, which the measure would create. Continuously appropriates moneys in the account to the California Water Commission for its actual costs of implementing these provisions and for specified water infrastructure projects. Enacts the Water Infrastructure Bond Act of 2022.	04/07/2022 - To ASSEMBLY Committees on WATER, PARKS AND WILDLIFE and NATURAL RESOURCES.
<u>ACR 180</u> Bauer-Kahan (D)	Special Districts Week	SUPPORT	Proclaims the week of May 15, 2022, to May 21, 2022, to be Special Districts Week.	05/23/2022 - To SENATE Committee on RULES.
<u>SB 12</u> McGuire (D)	Local Government Planning and Zoning: Wildfires		Requires the safety element, upon the next revision of the housing element or the hazard mitigation plan, on or after a certain date, whichever occurs first, to be reviewed and updated as necessary to include a comprehensive retrofit strategy to reduce the risk of property loss and damage during wildfires, and would require the planning agency to submit the adopted strategy to the Office of Planning and Research for inclusion into the clearinghouse for climate adaptation.	05/24/2022 - From ASSEMBLY Committee on HOUSING AND COMMUNITY DEVELOPMENT with author's amendments.;05/24/2022 - In ASSEMBLY. Read second time and amended. Re-referred to Committee on HOUSING AND COMMUNITY DEVELOPMENT.
<u>SB 37</u> Cortese (D)	Contaminated Site Cleanup and Safety Act		Repeals the requirement for the State Department of Health Care Services to compile a list of all public drinking water wells. Provides that a project located on a site that is included on any list compiled by the state agencies specified above and posted on the California Environmental Protection Agency's internet website is exempted from CEQA if the project meets specified conditions.	09/08/2021 - In ASSEMBLY. To Inactive File.

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Bill No. Author	Title	IRWD Position	Summary/Effects	Status
<u>SB 45</u> Portantino (D)	Short-lived Climate Pollutants: Organic Waste Reduction		Requires the State Air Resources Board, no later than January 1, 2018, to approve and begin implementing a short-lived climate pollutant strategy. Requires the department, in consultation with the state board, to provide assistance to local jurisdictions, including, but not limited to, any funding appropriated by the Legislature in the annual Budget Act, for purposes of assisting local agencies to comply with these provisions, including any regulations adopted by the department.	05/05/2022 - To ASSEMBLY Committee on NATURAL RESOURCES.
<u>SB 72</u> Rubio (D)	Property Insurance: Wildfire Risk		Requires the Insurance Commissioner to transmit to the Secretary of the Natural Resources Agency a report that makes geographic recommendations for vegetation management projects based on the commissioner's analysis of specified information, including nonrenewal data on policies of residential property insurance, and to post that report on the Department of Insurance's internet website.	08/26/2021 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>SB 99</u> Dodd (D)	Community Energy Resilience Act of 2021		Requires the State Energy Resources Conservation and Development Commission to develop and implement a grant program for local governments to develop community energy resilience plans and expedite permit review of distributed energy resources by local governments.	08/26/2021 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>SB 222</u> Dodd (D)	Water Rate Assistance Program	WATCH	Establishes the Water Rate Assistance Fund in the State Treasury to help provide water affordability assistance, for both drinking water and wastewater services, to low-income ratepayers and ratepayers experiencing economic hardship in State. Makes moneys in the fund available upon appropriation by the Legislature to the department to provide direct water bill assistance, water bill credits, and water crisis assistance, and would require 80% of total funds to be directly applied to customer assistance.	09/03/2021 - In ASSEMBLY. To Inactive File.

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Bill No. Author	Title	IRWD Position	Summary/Effects	Status
<u>SB 230</u> Portantino (D)	State Water Resources Control Board: Constituents		Requires the State Water Resources Control Board to establish, maintain, and direct, a dedicated program called the Constituents of Emerging Concern in Drinking Water Program for a specified number of years to assess the state of information and recommend areas for further study on, among other things, the occurrence of Constituents of Emerging Concern in drinking water sources and treated drinking water. Requires the state board, upon appropriation by the Legislature, to provide financial assistance.	05/16/2022 - From ASSEMBLY Committee on ENVIRONMENTAL SAFETY AND TOXIC MATERIALS with author's amendments.;05/16/2022 - In ASSEMBLY. Read second time and amended. Re-referred to Committee on ENVIRONMENTAL SAFETY AND TOXIC MATERIALS.
<u>SB 335</u> Cortese (D)	Workers' Compensation: Liability		Reduces the time periods after the date the claim form is filed with an employer in which the injury is presumed compensable and the presumption is rebuttable only by evidence discovered subsequent to the time period for certain injuries or illnesses, including hernia, heart trouble, pneumonia, or tuberculosis, among others, sustained in the course of employment of a specified member of law enforcement or a specified first responder.	07/13/2021 - In ASSEMBLY Committee on INSURANCE: Failed passage.
<u>SB 342</u> Gonzalez (D)	South Coast Air Quality Management District		Adds members to the South Coast Air Quality Management District board, appointed by the Senate Committee on Rules and the Speaker of the Assembly. Requires the additional members to reside in and work directly with communities in the South Coast Air Basin that are disproportionately burdened by and vulnerable to high levels of pollution and issues of environmental justice. Authorizes the district board to create a Labor Advisory Panel to provide feedback.	01/31/2022 - In SENATE. Read third time. Failed to pass SENATE.
<u>SB 410</u> Leyva (D)	Department of Industrial Relations		Exempts any occupational safety and health standard and order from the standardized regulatory impact analysis requirement. Requires an economic impact assessment to be prepared for the adoption, amendment, or repeal of any occupational safety and health standard and order, including for any such standard and order that is a major regulation proposed after a specified date.	09/08/2021 - In ASSEMBLY. To Inactive File.

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SB 459 Allen (D)	Political Reform Act of 1974: Lobbying		Requires lobbyists, lobbying firms, and lobbyist employers to include information in the periodic reports that identifies each bill or administrative action subject to lobbying activity, and the respective position advocated for, during that period. Requires additional specified disclosures for lobbying activity during a specified period before the Legislature is scheduled to adjourn in a calendar year.	07/06/2021 - In ASSEMBLY. Read second time and amended. Re-referred to Committee on APPROPRIATIONS.
SB 463 Dahle (R)	Water: Landowner Or Water Right Holder Right		Authorizes a landowner or water right holder to, where a conduit is constructed across or buried beneath the lands of a specified number or more landowners, and the conduit is not under the control or management of any public agency or authority, modify, repair, or replace, as defined, the conduit on or beneath the land of any other landowner that the conduit is constructed across or buried beneath. Requires the landowner or water right holder making the change to receive written permission from a public.	03/22/2022 - In ASSEMBLY Committee on WATER, PARKS AND WILDLIFE: Not heard.
SB 505 Hertzberg (D)	Wages: Withholdings: Written Authorization		Requires a public employer, absent fraud, misrepresentation, or theft, to make a good faith effort to consult with an employee to obtain a written authorization to resolve a monetary obligation before utilizing third-party collection services or commencing a civil action. Requires the written authorization to include a mutual agreement between the public employer and employee and, to the extent possible, would prohibit that written authorization from placing an undue financial burden upon the employee.	06/17/2021 - In ASSEMBLY. Suspend Assembly Rule 96.;06/17/2021 - Re-referred to ASSEMBLY Committee on RULES.
SB 520 Wilk (R)	Water Resources: Permit to Appropriate: Applications		Requires the State Water Resources Control Board, if the board has not rendered a final determination on an application for a permit to appropriate water within 30 years from the date the application was filed, to issue a new notice and provide an opportunity for protests before rendering a final determination, with specified exceptions.	06/17/2021 - In ASSEMBLY Committee on WATER, PARKS AND WILDLIFE: Not heard.

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Bill No. Author	Title	IRWD Position	Summary/Effects	Status
<u>SB 551</u> Stern (D)	California Zero-Emission Vehicle Authority		Establishes the California Zero-Emission Vehicle Authority within the Governor's Office of Business and Economic Development. Requires the authority to coordinate activities among state agencies to advance zero-emission vehicle infrastructure deployment, including charging stations and hydrogen refueling stations, as well as ensure related equity, workforce development, economic development, and other needs are addressed, as specified.	08/26/2021 - In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.
<u>SB 559</u> Hurtado (D)	Water Conveyance Restoration Fund		Establishes the Water Conveyance Restoration Fund in the State Treasury to be administered by the Department of Water Resources in consultation with the State Water Resources Control Board and the Department of Fish and Wildlife.	09/08/2021 - In ASSEMBLY. To Inactive File.
<u>SB 582</u> Stern (D)	Climate Emergency Mitigation, Safe Restoration		Requires the Air Resources Board to ensure that statewide greenhouse gas emissions are reduced to at least a certain percentage and up to a certain percentage below the 1990 level by a specified year. Adopts a state policy to lead a global effort to restore oceanic and atmospheric concentrations of greenhouse gas emissions to preindustrial levels as soon as possible, and to restore community health and reverse the impacts from the damage and injustice climate change is causing.	01/31/2022 - In Senate. Died on file pursuant to Joint Rule 56.
<u>SB 649</u> Cortese (D)	Local Governments: Affordable Housing: Local Tenant		Establishes a state policy supporting local tenant preferences for lower income households, as defined, that are subject to displacement risk, and, further, permits local governments and developers in receipt of local or state funds, federal or state tax credits, or an allocation of tax-exempt private activity bonds designated for affordable rental housing to restrict occupancy by creating a local housing preference for lower income households subject to displacement risk.	06/17/2021 - In ASSEMBLY. Suspend Assembly Rule 96.;06/17/2021 - Re-referred to ASSEMBLY Committee on RULES.
<u>SB 719</u> Min (D)	Exempt Surplus Land: Eligible Military Base Land		Deems certain land comprising of the Tustin Marine Corps Air Station to be exempt surplus land if specified requirements are met. Requires at least a certain percent of the residential units that are	06/10/2021 - To ASSEMBLY Committees on LOCAL

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			permitted after a certain date to be restricted to persons and families of low or moderate income, and at least a certain percent of those units to be restricted to lower income households. Requires a local agency that disposes of exempt surplus land under these provisions to comply with certain requirements.	GOVERNMENT and HOUSING AND COMMUNITY DEVELOPMENT.
<u>SB 733</u> Hueso (D)	Energy Storage: Pumped Storage Hydroelectric Facilities		Requires the chair of the Energy Resources Conservation and Development Commission to appear annually before the appropriate policy committees of the Legislature to report on activities of the commission, as specified.	06/21/2021 - In ASSEMBLY. Suspend Assembly Rule 96.;06/21/2021 - Re-referred to ASSEMBLY Committee on RULES.
<u>SB 832</u> Dodd (D)	Water Rights: Measurement of Diversion		Clarifies existing law that a diverter, as defined, diverting specified acre feet or more of water per year is subject to these water diversion measurement, recording, and reporting requirements. Requires the state board to develop and administer a study to determine the ability of evapotranspiration alone, or in combination with other methodologies, to provide the information needed to monitor water diversions. Requires the state board to provide the Legislature with a report documenting the study.	05/19/2022 - In SENATE Committee on APPROPRIATIONS: Held in committee.
<u>SB 833</u> Dodd (D)	Community Energy Resilience Act of 2022		Requires a plan to, among other things, identify critical facilities, facilities where the construction of microgrids or other distributed energy sources could meet local resilience needs, and potential funding sources for implementing projects in the plan, include a process for the expedited permit review of distributed energy resources by the local government, and demonstrate consistency with the city, county, or city and county general plan and other local government planning documents, as specified.	05/23/2022 - In SENATE. To Special Consent Calendar.
<u>SB 844</u> Min (D)	Cybersecurity Improvement: Reports		Establishes a program to award grants to eligible entities to address cybersecurity risks and cybersecurity threats to information systems owned or operated by, or on behalf of, state, local, or tribal governments. Requires the center to create four reports, to be	05/19/2022 - To ASSEMBLY Committee on EMERGENCY MANAGEMENT.

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			delivered to the Legislature. Relates to federal State and Local Cybersecurity Improvement Act.	
<u>SB 847</u> Hurtado (D)	COVID 19 Relief: Tenancy: Grant Program		Creates a grant program under the administration of the Department of Housing and Community Development and would require the department to award a program grant, as defined, to a qualified applicant who submits a complete application, as defined, on a first come, first served basis. Requires the program to provide grants to all tier one applicants, as defined, before providing grants to other applicants. Relates to qualified applicant. Establishes a fund.	05/19/2022 - From SENATE Committee on APPROPRIATIONS: Do pass.;05/19/2022 - In SENATE. Read second time. To third reading.
<u>SB 849</u> Umberg (D)	Surplus Land		Requires, if, after a local agency responsible for the disposal of surplus land and an entity desiring to purchase or lease the land have entered into an exclusive negotiating agreement, the determined value of the sales price and terms or lease terms exceeds a certain amount, that disposing agency post prominently on its internet website the terms of the proposed disposition of the surplus land for not less than ninety days before entering a legally binding agreement to dispose of the land.	03/09/2022 - Re-referred to SENATE Committee on GOVERNANCE AND FINANCE.
<u>SB 852</u> Dodd (D)	Climate Resilience Districts: Formation: Funding		Imposes certain requirements on a project undertaken or financed by a district. Requires a district to obtain an enforceable commitment from the developer that contractors and subcontractors performing the work use a skilled and trained workforce, in accordance with specified provisions.	05/24/2022 - In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
<u>SB 867</u> Laird (D)	Sea Level Rise Planning: Database		Extends the sunset date of existing law which requires that various public agencies and private entities provide to the Natural Resources Agency, on a biannual basis, sea level rise planning information that is under the control or jurisdiction of the public agencies or private entities.	05/05/2022 - To ASSEMBLY Committee on NATURAL RESOURCES.
<u>SB 880</u> Laird (D)	Water Diversion: Monitoring and Reporting		Extends indefinitely existing law which requires any diverter, who has completed an instructional course regarding the devices or	05/23/2022 - In SENATE. To Special Consent Calendar.

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			measurement method administered by the University of California Cooperative Extension, including passage of a proficiency test before the completion of the course, to be considered a qualified individual when installing and maintaining devices or implementing methods of measurement that were taught in the course for the diverter's diversion.	
SB 888 Melendez (R)	Land Use: Subdivision Maps: Expiration Dates		Authorize the County of Riverside to extend the expiration date, by up to a specified months, of any approved tentative map or parcel map that meets certain criteria, including that it was approved on or after a specified date, and not later than a specified date, relates to the construction of single or multifamily housing, as specified. Requires any legislative, administrative, or other approval by any state agency that pertains to a development project included in a map that is extended.	03/24/2022 - From SENATE Committee on GOVERNANCE AND FINANCE with author's amendments.;03/24/2022 - In SENATE. Read second time and amended. Re-referred to Committee on GOVERNANCE AND FINANCE.
SB 890 Nielsen (R)	Department of Water Resources: Water Storage Fund		Establishes the Water Storage and Conveyance Fund in the State Treasury to be administered by the Department of Water Resources. Requires all moneys deposited in the fund to be expended, upon appropriation by the Legislature, in support of subsidence repair and reservoir storage costs, including environmental planning, permitting, design, and construction and all necessary road and bridge upgrades required to accommodate capacity improvements.	03/08/2022 - In SENATE Committee on NATURAL RESOURCES AND WATER: Failed passage.
SB 892 Hurtado (D)	Cybersecurity Preparedness: Food and Agriculture Sector		Requires the Office of Emergency Services to develop, propose, and adopt optional reporting guidelines applicable to companies and cooperatives in the food and agriculture industry and entities in the water and wastewater systems industry if they identify a significant and verified cyber threat or active cyberattack. Requires CalOES to direct the California Cybersecurity Integration Center to prepare, and CalOES to submit to the Legislature a strategic, multiyear outreach plan.	05/24/2022 - In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.

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<u>SB 896</u> Dodd (D)	Wildfires: Defensible Space: Grant Programs		Requires any local governmental entity that is qualified to conduct defensible space assessments in very high and high fire hazard severity zones, as specified, and that reports that information to the Department of Forestry and Fire Protection, to report that information using the common reporting platform.	05/16/2022 - In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
<u>SB 897</u> Wieckowski (D)	Accessory Dwelling Units: Junior Units Dwelling Units		Changes the height limitation applicable to an accessory dwelling unit subject to ministerial approval to 25 feet if the accessory dwelling unit is within 1/2 mile walking distance of a major transit stop or a high-quality transit corridor, as those terms are defined, or if the accessory dwelling unit is attached to a primary dwelling, as specified.	05/23/2022 - In SENATE. Read second time. To third reading.
<u>SB 931</u> Leyva (D)	Deterring Union Membership: Violations		Authorizes an employee organization, as described, to bring a claim before the Public Employment Relations Board alleging that a public employer violated the prohibition against deterring or discouraging union membership. Upon a finding by the board that the public employer violated those provisions, the public employer would be subject to a civil penalty of up to \$1,000 for each affected employee, not to exceed \$100,000 in total, and subject to attorneys fees and costs, as described.	05/24/2022 - In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
<u>SB 938</u> Hertzberg (D)	The Local Government Reorganization Act of 2000	SUPPORT	Authorizes a commission to initiate a proposal for the dissolution of a district, as described, if the commission approves, adopts, or accepts a specified study that includes a finding, based on a preponderance of the evidence, that, among other things, the district has one or more documented chronic service provision deficiencies, the district spent public funds in an unlawful or reckless manner, or the district has shown willful neglect by failing to consistently adhere to the State Public Records Act.	05/05/2022 - To ASSEMBLY Committee on LOCAL GOVERNMENT.
<u>SB 954</u> Archuleta (D)	Public Works: Wages: Electronic Payroll Records		Requires the Department of Industrial Relations to establish an online database of electronic certified payroll records, which the bill would require to be accessible only to certain trust funds	05/19/2022 - From SENATE Committee on APPROPRIATIONS:

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			established under federal law and certain committees established under federal law, as specified.	Do pass.;05/19/2022 - In SENATE. Read second time. To third reading.
SB 984 Archuleta (D)	Military Service: Leave of Absence: Pay and Benefits		Repeals existing law specifying that employee members of reserve military units and the National Guard required to attend scheduled reserve drill periods or perform other inactive duty reserve obligations shall be granted military leave of absence without pay as provided by federal law, as specified.	05/23/2022 - In SENATE. To Special Consent Calendar.
SB 989 Hertzberg (D)	Climate Change Preparedness, Resiliency, and Jobs		Establishes the Climate Change Preparedness, Resiliency, and Jobs for Communities Program, to be administered by the council, and would require the council to fund grants to develop and implement multibenefit, community-level, climate-beneficial projects to support community and landscape resiliency and workforce development.	05/24/2022 - In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
SB 991 Newman (D)	Public Contracts: Progressive Design-Build		Requires a local agency that uses the progressive design-build process to submit, no later than specified date, to the appropriate policy and fiscal committees of the Legislature a report on the use of the progressive design-build process containing specified information, including a description of the projects awarded using the progressive design-build process. Requires the design-build entity and its general partners or joint venture members to verify specified information under penalty of perjury.	05/19/2022 - To ASSEMBLY Committee on LOCAL GOVERNMENT.
SB 995 Nielsen (R)	Navigable Waters: Hazardous, Medical, or Human Waste		Makes it a misdemeanor to place, deposit, or dump hazardous, medical, or human waste in or upon the navigable waters of this state, or to place, deposit, or load it upon a vessel, with intent that it be dumped or deposited in or upon the navigable waters of this state or at any point in the ocean within certain miles of any point on the coastline of the state. Imposes a state mandated local program.	03/22/2022 - Withdrawn from SENATE Committee on HEALTH.;03/22/2022 - Re-referred to SENATE Committee on ENVIRONMENTAL QUALITY.

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<u>SB 1010</u> Skinner (D)	Air Pollution: State Vehicle Fleet: Zero Emission		Requires at least a specified percent of newly purchased medium and heavy duty vehicles with a gross vehicle weight of specified pounds or more purchased by the department and other state entities for the state vehicle fleet to be zero emission vehicles. Requires a specified percent of newly purchased medium and heavy duty vehicles with a gross vehicle weight of specified pounds or more for the state vehicle fleet to be zero emission vehicles.	05/24/2022 - In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
<u>SB 1017</u> Eggman (D)	Leases: Termination of Tenancy: Abuse or Violence		Makes a landlord or agent liable to the tenant for actual damages and, except as specified, a civil penalty of not less than specified amount and more than specified amount in a civil action for violation of these provisions. Authorizes a defendant to affirmative defense to a cause of action for unlawful detainer that is based upon an act of abuse or violence against a tenant, a tenant's immediate family member, or a tenant's household member, as specified.	05/24/2022 - In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
<u>SB 1020</u> Laird (D)	Clean Energy, Jobs, and Affordability Act of 2022		Relates to the California Global Warming Solutions Act of 2006. Modifies with respect to the provision that a portion of the workshops be conducted in regions of the state that have the most significant exposure to air pollutants, specified communities as additionally being areas designated as federal extreme nonattainment.	05/24/2022 - In SENATE. Read second time. To third reading.
<u>SB 1044</u> Durazo (D)	Employers: State of Emergency or Emergency Condition		Prohibits an employer from preventing any employee, including employees of public entities, as specified, from accessing the employee's mobile device or other communications device for seeking emergency assistance, assessing the safety of the situation, or communicating with a person to confirm their safety.	05/23/2022 - In SENATE. Read second time. To third reading.
<u>SB 1058</u> Durazo (D)	Disability Insurance: Paid Family Leave: Applicant Data		Requires the Employment Development Department to collect data regarding the race and ethnicity of individuals who claim disability benefits under specified programs.	05/24/2022 - In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.

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<u>SB 1059</u> Becker (D)	Privacy: Data Brokers		Includes in the definition of data broker a business that knowingly collects and shares, as defined, certain personal information to third parties. Transfers all authority and responsibilities under the provisions relating to data broker registration from the Attorney General to the State Consumer Privacy Act, including by requiring data brokers to annually register with the State Consumer Privacy Act on or before a specified date.	05/19/2022 - In SENATE Committee on APPROPRIATIONS: Held in committee.
<u>SB 1063</u> Skinner (D)	Energy: Appliance Standards and Cost-effective Measures		Authorizes the State Energy Resources Conservation and Development Commission, upon considering specified factors and making a finding of good cause, to make the standards for minimum levels of operating efficiency for certain appliances effective sooner than one year after their date of adoption or revision, as specified. Requires that those other cost-effective measures prescribed by the commission also not result in any added total costs for consumers over the designed life of the impacted appliances.	05/23/2022 - In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
<u>SB 1066</u> Hurtado (D)	State Farmworkers Drought Resilience Pilot Project		Requires the department, commencing a specified date, and subject to an appropriation by the Legislature, to administer the Farmworkers Drought Resilience Pilot Project, under which certain households that include a person who worked as a farmworker for the entire period beginning a specified date, and ending a specified date, among other requirements, would receive supplemental pay of a specified amount per month for certain years.	05/24/2022 - In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
<u>SB 1068</u> Laird (D)	Governor's Office of Business and Economic Development		Requires the Governor's Office of Business and Economic Development to develop economic forecasts. Requires the economic forecasts to include climate impacts.	05/19/2022 - In SENATE Committee on APPROPRIATIONS: To Suspense File.;05/19/2022 - In SENATE Committee on APPROPRIATIONS: Held in committee.
<u>SB 1069</u> Umberg (D)	State Grant Programs: Negotiated Cost Rate Agreements		Establishes the Department of General Services in the Government Operations Agency for purposes of providing centralized services of state government. Establishes various state grant programs.	05/23/2022 - In SENATE. To Special Consent Calendar.

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<u>SB 1075</u> Skinner (D)	Hydrogen: Green Hydrogen: Emissions of Greenhouse Gases		Creates the California Clean Hydrogen Hub Fund within the State Treasury under the administration of the I-Bank. Authorizes the moneys in the fund, upon appropriation by the Legislature. Provides grants for clean hydrogen projects developed in California, to match federal funds granted to a regional clean hydrogen hub.	05/24/2022 - In SENATE. To Special Consent Calendar.
<u>SB 1077</u> Bates (R)	Coastal Resources: Climate Ready Program: Grants		Authorizes the conservancy to award grants to public agencies and nonprofit organizations that increase resilience of habitat and natural lands. Requires the conservancy, in awarding grants, as part of the prioritization of projects described above, to include those projects that accomplish the removal of nonnative and invasive plants from coastal features, habitats, and ecosystems, and their replacement with native plant species, upon appropriation.	05/24/2022 - In SENATE. To Special Consent Calendar.
<u>SB 1078</u> Allen (D)	Sea Level Rise Revolving Loan Pilot Program		Requires the council, in consultation with the conservancy, to develop the Sea Level Rise Revolving Loan Pilot Program for purposes of providing low interest loans to local jurisdictions, as defined, for the purchase of coastal properties in their jurisdictions identified as vulnerable coastal property, as defined, located in specified communities, including low income communities, as provided. Establishes the Sea Level Rise Revolving Loan Fund.	05/24/2022 - In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
<u>SB 1084</u> Hurtado (D)	Property Ownership: Foreign Ownership		Prohibits a foreign government from purchasing, acquiring, or holding an interest, as defined, in agricultural land within the State. Exempts land held by foreign governments before a specified date, from that prohibition. Requires the department to be reimbursed for costs incurred for compiling data, printing, and mailing the report, as specified.	05/24/2022 - In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
<u>SB 1095</u> Durazo (D)	Air Quality: Rules and Regulations		Authorizes a local air district to contract with a third party to conduct the required assessment of socioeconomic impacts. Requires a local air district to ensure that a prospective third party	05/19/2022 - In SENATE Committee on APPROPRIATIONS: Held in committee.

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			contractor include in its proposal for the assessment specified information, including, among other things, a conflicts statement and a proposed schedule and budget for the assessment. Expands the definition of socioeconomic impacts.	
<u>SB 1100</u> Cortese (D)	Open Meetings: Orderly Conduct		Authorizes the presiding member of the legislative body conducting a meeting to remove an individual for disrupting the meeting. Requires removal to be preceded by a warning by the presiding member of the legislative body that the individual is disrupting the proceedings, a request that the individual curtail their disruptive behavior or be subject to removal, and a reasonable opportunity to curtail their disruptive behavior.	05/05/2022 - To ASSEMBLY Committees on LOCAL GOVERNMENT and JUDICIARY.
<u>SB 1101</u> Caballero (D)	Carbon Sequestration		Requires the state board, in consultation with the Geologic Carbon Sequestration Group, which the bill would establish in the California Geological Survey, to establish a Carbon Capture, Utilization, and Storage Program, as provided, for developing the commercial application of carbon capture, utilization, and storage technologies to reduce carbon dioxide emissions from new and existing facilities with a primary objective of deploying projects that will accelerate, to the maximum extent practicable.	05/19/2022 - From SENATE Committee on APPROPRIATIONS: Do pass.;05/19/2022 - In SENATE. Read second time. To third reading.
<u>SB 1102</u> Glazer (D)	Occupational Safety and Health		Requires the Occupational Safety and Health Standards Board to post information on any proposed order or standard on the boards internet website no later than 5 calendar days following the meeting. Requires the board, in conjunction with the Division of Occupational Safety and Health, to report to the Legislature as soon as practicable on the need to update regulations governing agricultural equipment that comply with specified standards.	04/27/2022 - In SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Not heard.
<u>SB 1109</u> Caballero (D)	California Renewables Portfolio Standard Program		Extends the electrical corporations obligation to collectively procure their proportionate share of 125 megawatts of cumulative rated generating capacity from bioenergy projects to specified date. Revises the financial commitments by which electrical corporations	05/23/2022 - In SENATE. Read second time. To third reading.

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			collectively procure their proportionate share of the cumulative rated generating capacity to 5 to 15 years, inclusive.	
<u>SB 1118</u> Borgeas (R)	California Environmental Quality Act: Judicial Relief		States the intent of the Legislature that, in undertaking judicial review under the California Environmental Quality Act, insubstantial or merely technical omissions are not grounds for relief and that an omission in an environmental impact report's significant impacts analysis is prejudicial if it deprived the public and decisionmakers of substantial relevant information about the project's likely adverse impacts.	05/19/2022 - In SENATE Committee on APPROPRIATIONS: Held in committee.
<u>SB 1124</u> Archuleta (D)	Public Health Goal: Primary Drinking Water Standard		Requires, on or before specified date, Office of Environmental Health Hazard Assessment to prepare a public health goal for manganese. Authorizes the state board before adopting a primary drinking water standard for manganese, to continue to provide funding for treatment, source protection, and alternative water supplies, as provided, and to require community water systems to monitor manganese in their source water.	05/23/2022 - In SENATE. Read second time. To third reading.
<u>SB 1127</u> Atkins (D)	Workers Compensation: Liability Presumptions		Reduces Workers compensation liability presumptions from 90-day time periods to 60 days for all injuries and employees and, for certain injuries or illnesses, including hernia, heart trouble, pneumonia, or tuberculosis, among others, sustained in the course of employment of a specified member of law enforcement or a specified first responder, would reduce those time periods to 30 days.	05/24/2022 - In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
<u>SB 1136</u> Portantino (D)	Expedited Environmental Review: Climate Change		Requires those specified public agencies, at the time of adoption of a rule or regulation requiring compliance with an energy efficiency standard, to perform an environmental analysis of the reasonably foreseeable methods of compliance. Imposes additional requirements on air districts. Imposes a state mandated local program. Authorizes the use of a focused environmental impact	05/24/2022 - In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.

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			report for a project that consists of the installation of pollution control equipment or new or modified equipment.	
<u>SB 1144</u> Wiener (D)	Water Efficiency and Quality Assessment Reports		Defines a "covered building" to mean a building owned and occupied, or leased, maintained, and occupied, by a state agency, or a public school building, as described. Provides that if the report identifies noncompliant plumbing fixtures and noncompliant appliances, the bill would require the operating agency to replace those fixtures and appliances that fail to meet water efficiency standards, as specified, at the earliest practical time, subject to available funding.	05/24/2022 - In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
<u>SB 1157</u> Hertzberg (D)	Urban Water Use Objectives: Indoor Residential Use	OPPOSE UNLESS AMENDED	Relates to Urban water use objectives and indoor residential water use. Eliminates the option of using the greater of 52.5 gallons per capita daily and the greater of 50 gallons per capita daily, as applicable, or a standard recommended by the department and the board as the standard for indoor residential water use.	05/05/2022 - To ASSEMBLY Committee on WATER, PARKS AND WILDLIFE.
<u>SB 1162</u> Limon (D)	Employment: Salaries and Wages		Requires a private employer that has 100 or more employees to submit a pay data report to Department of Fair Employment and Housing (DFEH). Requires an employer, upon request, to provide to an employee the pay scale for the position in which the employee is currently employed.	05/24/2022 - In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
<u>SB 1163</u> Dahle (R)	Enhanced Infrastructure Financing Districts		Makes a nonsubstantive change to Enhanced Infrastructure Financing Districts.	03/02/2022 - To SENATE Committee on RULES.
<u>SB 1166</u> Grove (R)	Department of Water Resources: Appropriations of Water		Makes nonsubstantive changes to the Department of Water Resources and appropriations of water.	03/02/2022 - To SENATE Committee on RULES.
<u>SB 1168</u> Cortese (D)	Public Employees' Retirement: Beneficiary Payment		Relates to Public Employees' Retirement System (PERS) required payment of \$500 to be made to a beneficiary upon the death of a member after retirement and while receiving a retirement	05/12/2022 - To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

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			allowance from PERS, unless otherwise provided. Increases this benefit to specified amount.	
<u>SB 1173</u> Gonzalez (D)	Public Retirement Systems: Fossil Fuels: Divestment		Prohibits the boards of the Public Employees' Retirement System and the State Teachers' Retirement System from making new investments or renewing existing investments of public employee retirement funds in a fossil fuel company. Suspends the above described liquidation provision upon a good faith determination by the board that certain conditions materially impact normal market mechanisms for pricing assets.	05/19/2022 - From SENATE Committee on APPROPRIATIONS: Do pass.;05/19/2022 - In SENATE. Read second time. To third reading.
<u>SB 1188</u> Laird (D)	Safe Drinking Water State Revolving Fund: Assistance		Deletes provisions of the Safe Drinking Water State Revolving Fund relating to 0% financing and interest and would instead generally authorize the board, to the extent authorized by federal law, to provide reduced or 0% financing to further the purposes of the Safe Drinking Water State Revolving Fund Law of 1997. Deletes certain limitations on the financial assistance provided to water corporations regulated by the Public Utilities Commission.	05/23/2022 - In SENATE. To Special Consent Calendar.
<u>SB 1192</u> Ochoa Bogh (R)	Public Contracts: Withheld Payments		Provides that a contractor includes a contractor performing a public works contract, as defined, and any person or entity who would qualify as a contractor, as specified.	05/05/2022 - To ASSEMBLY Committee on ACCOUNTABILITY AND ADMINISTRATIVE REVIEW.
<u>SB 1194</u> Allen (D)	Public Restrooms: Building Standards		Authorizes city, county, or city and county to require, by ordinance or resolution, that public restrooms constructed within its jurisdiction comply with specified requirements instead of complying with the plumbing standards set forth in the California Building Standards Code.	05/23/2022 - In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
<u>SB 1197</u> Caballero (D)	Water Innovation and Drought Resiliency Act of 2022		Enacts the Water Innovation and Drought Resiliency Act of 2022. Creates the Initiative to Advance Water Innovation and Drought Resiliency at the office for the furtherance of new technologies and other innovative approaches in the water sector. Requires the office to submit to the Legislature and post on its internet website a report	05/19/2022 - In SENATE Committee on APPROPRIATIONS: Held in committee.

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			detailing the actions taken as part of the initiative and recommendations for further actions.	
<u>SB 1205</u> Allen (D)	Water Rights: Appropriation		Requires the board to develop and adopt regulations to provide greater specificity as to the methods and practices for determining water availability in the issuance and administration of water right permits and licenses, including consideration of the effects of climate change, as specified, upon watershed hydrology as part of the preparation of water availability analyses.	05/19/2022 - From SENATE Committee on APPROPRIATIONS: Do pass.;05/19/2022 - In SENATE. Read second time. To third reading.
<u>SB 1217</u> Allen (D)	State-Regional Collaborative for Climate		Establishes the State-Regional Collaborative for Climate, Equity, and Resilience to provide guidance, on or before January 1, 2024, to the state board for approving new guidelines for sustainable communities strategies.	05/24/2022 - In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
<u>SB 1218</u> Hurtado (D)	Delta Stewardship Council: Annual Water Supply		Requires the Delta Stewardship Council at least once annually, to publish on its internet website, in consultation with relevant state and federal agencies and the public, a water supply reliability estimation for the water flows into the Delta and out of the Straits of Carquinez and into the San Francisco Bay.	03/02/2022 - To SENATE Committee on NATURAL RESOURCES AND WATER.
<u>SB 1219</u> Hurtado (D)	21st Century Water Laws and Agencies: Committee		Requires the Secretary of the Natural Resources Agency and the Secretary for Environmental Protection to convene a committee to develop and submit, on or before a specified date, to the Governor and to the Legislature a strategic vision, proposed statutes, and recommendations for a modern 21st century set of water laws and regulations and state and local water agencies for the state.	05/19/2022 - From SENATE Committee on APPROPRIATIONS: Do pass.;05/19/2022 - In SENATE. Read second time. To third reading.
<u>SB 1220</u> Hurtado (D)	Sustainable Groundwater Management Act: Groundwater		Provides that nothing in specified provisions relating to making submissions to the Department of Water Resources shall be construed to prohibit groundwater sustainability agencies that have developed multiple groundwater sustainability plans for a basin from amending the coordination agreement following Department of Water Resources issuance of an assessment of the plans.	03/02/2022 - To SENATE Committee on NATURAL RESOURCES AND WATER.

IRWD 2022 LEGISLATIVE MATRIX
Updated 05/25/2022

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
<u>SB 1221</u> Hurtado (D)	Wastewater Operator Certification Program		Makes a nonsubstantive change in the provisions concerning Wastewater operator certification program regarding accepting experience in lieu of qualification training.	03/02/2022 - To SENATE Committee on RULES.
<u>SB 1224</u> Bates (R)	Watersheds: Wildlife Habitat: Orange and San Diego		Authorizes the Wildlife Conservation Board, upon an appropriation by the Legislature, to make grants to acquire fee title or conservation easements or to perform restoration, or a combination thereof, in watersheds with habitats for sensitive wildlife populations in specified regions in the Counties of Orange and San Diego, as provided.	05/24/2022 - In SENATE. To Special Consent Calendar.
<u>SB 1230</u> Limon (D)	Zero-Emission and Near-Zero-Emission Vehicle Incentive		Requires the regulations implementing the Clean Cars 4 All Program to ensure that an eligible state resident may participate in the program regardless of whether the local air district that the person resides in has contracted with the state board to implement the program, and that an incentive that is used to purchase a vehicle is only used for the purchase of a hybrid vehicle or a zero-emission vehicle.	05/23/2022 - In SENATE. Read second time. To third reading.
<u>SB 1235</u> Borgeas (R)	Air Pollution: Portable Equipment: Emergency Events		Codifies the State Air Resources Board's regulation authorizing portable equipment to be operated during an emergency event, as defined, and would also authorize portable equipment to be operated during a public safety power shut-off event.	03/02/2022 - To SENATE Committee on ENVIRONMENTAL QUALITY.
<u>SB 1253</u> Melendez (R)	Infrastructure Plan: Flood Control: Delta Levees		Require the plan to set out infrastructure priorities relating to specified flood prevention and maintenance projects.	05/23/2022 - In SENATE. To Special Consent Calendar.
<u>SB 1254</u> Hertzberg (D)	Drinking Water: Administrator: Managerial Services		Expands the definition of designated water system and limit the liability of an administrator when the State Water Resources Control Board appoints an administrator to a designated water system, as prescribed.	05/23/2022 - In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.

IRWD 2022 LEGISLATIVE MATRIX
Updated 05/25/2022

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
<u>SB 1261</u> Stern (D)	Residential Building Extreme Heat Zone Mitigation Grant		Requires the commission, in consultation with the Natural Resources Agency, to develop a residential building extreme heat zone mitigation grant program to provide grants to residents to mitigate extreme heat related impacts. Requires the commission, beginning a specified date of the year following the first year in which grants are awarded and annually thereafter, to report to the appropriate policy committees of the Legislature a summary of the grants awarded under the program, as specified.	05/23/2022 - In SENATE. Read second time. To third reading.
<u>SB 1264</u> Dahle (R)	Property Assessed Clean Energy Program: Wildfire Safety		Authorizes specified public agencies to enter into voluntary contractual assessments with property owners to finance the installation of wildfire safety improvements, as defined, that are permanently fixed to real property, and would repeal the requirement that the improvement be fixed to existing real property.	03/02/2022 - To SENATE Committee on GOVERNANCE AND FINANCE.
<u>SB 1270</u> Umberg (D)	Courts: Civil Trials: COVID-19		Expresses the intent of the Legislature to help facilitate the successful operation of civil trials in the courts during the COVID-19 pandemic.	03/02/2022 - To SENATE Committee on RULES.
<u>SB 1292</u> Stern (D)	Development Restriction: Fire Hazard Severity Zones		Authorizes a city, county, or city and county to restrict the development of residential housing in moderate, high, and very high fire hazard severity zones, as defined, if the city, county, or city and county adopts a plan, as specified, ensuring the production of at least double the number of residential units not developed as a result of the restriction.	03/24/2022 - In SENATE Committee on HOUSING: Not heard.
<u>SB 1324</u> Durazo (D)	Rosenthal Fair Debt Collection Practices Act		Defines consumer debt, for purposes of the Rosenthal Fair Debt Collection Practices Act, to additionally include rental debt that became past due on or after specified date. Specifies that, for the purposes of the Debt Collection Licensing Act, the term consumer credit transaction does not mean a transaction that results in rental debt. Exempts a landlord collecting rent, as specified, from the	05/19/2022 - In SENATE Committee on APPROPRIATIONS: Held in committee.

IRWD 2022 LEGISLATIVE MATRIX
Updated 05/25/2022

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
			requirement to comply with the provisions of the FDCPA related to mandatory disclosures.	
<u>SB 1332</u> Becker (D)	Building Performance Standards		Provides that it is the intent of the Legislature to later enact legislation to create building performance standards for improvements in water and energy efficiency and reductions in the emissions of greenhouse gases in large buildings and to create a set of related financial support programs and tenant protection measures.	03/16/2022 - From SENATE Committee on RULES with author's amendments.;03/16/2022 - In SENATE. Read second time and amended. Re-referred to Committee on RULES.
<u>SB 1345</u> Ochoa Bogh (R)	Excavations: Subsurface Installations	OPPOSE UNLESS AMENDED	Revises the definition of legal excavation start date and time to, among other things, exclude weekends and holidays. Revises the definition of subsurface installation to include nonpressurized sewerlines, nonpressurized storm drains, and other nonpressurized drain lines. Revises the definition of working day by the deleting provision limiting the hours from specified time.	05/19/2022 - In SENATE Committee on APPROPRIATIONS: Held in committee.
<u>SB 1346</u> Becker (D)	Surplus Medication Collection and Distribution		Removes the requirement that the participating entity disclose source information to the county health department. Removes the requirement that the records be kept separate and conform to the Pharmacy Law.	05/23/2022 - In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
<u>SB 1372</u> Stern (D)	Sustainable Groundwater Management Act		Provides that the approval of a groundwater sustainability plan by the department shall not be construed to be a determination by or otherwise an opinion of the department that the allocation of groundwater pumping rights in the plan are consistent with groundwater rights law.	05/05/2022 - To ASSEMBLY Committee on WATER, PARKS AND WILDLIFE.
<u>SB 1373</u> Kamlager (D)	Surplus Land Disposal		Extends the date by which the disposition of property must be completed to specified date, if the property meets specified requirements. Extends that date further if the disposition of property, the local agency's right or ability to dispose of the property, or a development project for which the property is	05/23/2022 - In SENATE. Read third time, urgency clause adopted. Passed SENATE. *****To ASSEMBLY.

IRWD 2022 LEGISLATIVE MATRIX
Updated 05/25/2022

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
			proposed to be transferred, is the subject of judicial challenge. Declares that it is to take effect immediately as an urgency statute.	
<u>SB 1392</u> McGuire (D)	Fish and Wildlife: Steelhead Trout		Relates to steelhead trout fishing report-restoration card. Extends the operation of this report-restoration card program until specified date. Requires the department to report to the Legislature regarding those same steelhead trout fishing report-restoration card program issues again on or before specified date.	05/24/2022 - In SENATE. To Special Consent Calendar.
<u>SB 1396</u> Bradford (D)	Tenancy: Credit Reporting: Lower Income Households		Requires an independent evaluator, upon appropriation by the Legislature for this purpose, to be selected by the Department of Financial Protection and Innovation and to be responsible for conducting an evaluation on the impact of rental payment reporting in the State. Requires the evaluator to be chosen through a competitive process after the first year of completion, as specified. Requires the evaluator to create an annual report that contains certain information.	05/23/2022 - In SENATE. To Special Consent Calendar.
<u>SB 1420</u> Dahle (R)	Public Employees Retirement: Reciprocal Benefits		Requires that an agency participating in PERS that increases the compensation of a member who was previously employed by a different agency to bear all actuarial liability for the action if it results in an increased actuarial liability beyond what would have been reasonably expected for the member.	04/27/2022 - In SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Failed passage.;04/27/2022 - In SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Reconsideration granted.
<u>SB 1426</u> Caballero (D)	Cannabis: Water Pollution Crimes		Amends AUMA by making it a misdemeanor or felony to plant, cultivate, harvest, dry, or process more than 50 living cannabis plants, or any part thereof, and where that activity involves theft of groundwater, unauthorized tapping into a water conveyance or storage infrastructure or digging or extracting groundwater from an unpermitted well.	05/19/2022 - In SENATE Committee on APPROPRIATIONS: Held in committee.

IRWD 2022 LEGISLATIVE MATRIX
Updated 05/25/2022

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
<u>SB 1439</u> Glazer (D)	Campaign Contributions: Agency Officers		Extends the prohibition on contributions to the spouse of a party, participant, or a party or participant's agent, as specified, if the contribution is made from their joint bank account.	05/19/2022 - From SENATE Committee on APPROPRIATIONS: Do pass as amended.;05/19/2022 - In SENATE Committee on APPROPRIATIONS: Reconsideration granted.;05/19/2022 - From SENATE Committee on APPROPRIATIONS: Do pass.;05/19/2022 - In SENATE. Read second t
<u>SB 1442</u> Borgeas (R)	Water Conservation and Reclamation Projects		Makes nonsubstantive changes to related legislative findings and declarations of water conservation and reclamation projects.	03/09/2022 - To SENATE Committee on RULES.
<u>SB 1454</u> Archuleta (D)	California Privacy Rights Act of 2020: Exemptions		Extends those above-described exemptions indefinitely, authorizes the Legislature to amend the act to further the purposes and intent of the act by a majority vote of both houses of the Legislature, as specified.	03/23/2022 - Re-referred to SENATE Committee on JUDICIARY.
<u>SB 1458</u> Limon (D)	Workers Compensation: Disability Benefits: Gender		Increases the payment of disability benefits by the percentage of disparity in earnings between genders, as specified.	05/19/2022 - In SENATE Committee on APPROPRIATIONS: Held in committee.
<u>SB 1490</u> Governance and Finance Cmt	Validations		Enacts the First Validating Act of 2022, which would validate the organization, boundaries, acts, proceedings, and bonds of the state and counties, cities, and specified districts, agencies, and entities.	04/28/2022 - To ASSEMBLY Committee on LOCAL GOVERNMENT.
<u>SB 1494</u> Governance and Finance Cmt	Property Taxation: Revenue Allocations: Property Sales		Requires, under the procedures for collecting both personal and real property taxes, the tax collector to collect its cost for preparing the delinquent tax records and giving notice of delinquency. Authorizes, under the sealed bid or public auction sale procedures for tax-defaulted property, the tax collector to offer, if the highest bidder does not consummate the sale within the time period determined by the tax collector, the property to the next highest bidder at their bid price.	05/05/2022 - To ASSEMBLY Committee on REVENUE AND TAXATION.

IRWD 2022 LEGISLATIVE MATRIX
Updated 05/25/2022

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
<u>SCA 1</u> Hertzberg (D)	Elections: Referenda		Requires that the ballot for a referendum measure provide that a Yes vote is in favor of the referendum and rejects the statute or part of the statute subject to the referendum, and a No vote is against the referendum and approves the statute or part of the statute subject to the referendum, thus requiring a majority vote in favor of the referendum to reject the statute or part of the statute subject to the referendum.	09/01/2021 - In SENATE. From third reading. To Inactive File.
<u>SCA 9</u> Gonzalez (D)	Personal Rights: Right to Housing		Declares that the fundamental human right to housing exists in this state. Specifies that it is the shared obligation of state and local jurisdictions to respect, protect, and fulfill this right through progressively implemented measures, consistent with available resources, within an aggressive but reasonable timeframe.	03/23/2022 - To SENATE Committees on HOUSING and ELECTIONS AND CONSTITUTIONAL AMENDMENTS.
<u>SCR 5</u> Melendez (R)	State of emergency: COVID-19: Termination		Declares that the state of emergency proclaimed by the Governor on a specified date, is at an end, thereby terminating the emergency powers granted to the Governor as a result of that proclamation.	03/15/2022 - In SENATE Committee on GOVERNMENTAL ORGANIZATION: Failed passage.;03/15/2022 - In SENATE Committee on GOVERNMENTAL ORGANIZATION: Reconsideration granted.
<u>SCR 104</u> Limon (D)	Compost Awareness Week		Designates the week of May 1, 2022, through May 7, 2022, as Compost Awareness Week.	05/24/2022 - Enrolled.
<u>HR 616</u> Tlaib (D)	Water Shutoffs Prohibition		Prohibits water shutoffs during the Coronavirus disease 2019 emergency period, provides drinking and waste water assistance to households.	01/28/2021 - INTRODUCED.;01/28/2021 - To HOUSE Committee on ENERGY AND COMMERCE.;01/28/2021 - To HOUSE Committee on EDUCATION AND LABOR.
<u>HR 737</u> Valadao (R)	California Operational Flexibility and Drought Relief		Extends the authorities under the Water Infrastructure Improvements for the Nation Act of 2016 providing operational flexibility, drought relief, and other benefits to the State of California.	02/02/2021 - INTRODUCED.;02/02/2021 - To HOUSE Committee on NATURAL RESOURCES.

IRWD 2022 LEGISLATIVE MATRIX
Updated 05/25/2022

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
<u>HR 1015</u> Napolitano (D)	Water Recycling and Reuse Project Grants	SUPPORT	Establishes a grant program for the funding of water recycling and reuse projects.	02/11/2021 - INTRODUCED.;02/11/2021 - To HOUSE Committee on NATURAL RESOURCES.
<u>HR 1352</u> Lawrence (D)	Trust Fund for Water and Sewer Infrastructure		Establishes a trust fund to provide for adequate funding for water and sewer infrastructure.	04/05/2021 - In HOUSE Committee on AGRICULTURE: Referred to Subcommittee on CONSERVATION AND FORESTRY.
<u>HR 1848</u> Pallone (D)	National Infrastructure		Rebuilds and modernizes the Nation's infrastructure to expand access to broadband and Next Generation 9-1-1, rehabilitate drinking water infrastructure, modernize the electric grid and energy supply infrastructure, redevelop brownfields, strengthen health care infrastructure, create jobs, and protect public health and the environment.	01/20/2022 - In HOUSE Committee on NATURAL RESOURCES: Referred to Subcommittee on INDIAN, INSULAR AND ALASKA NATIVE AFFAIRS.;01/20/2022 - In HOUSE Committee on NATURAL RESOURCES: Referred to Subcommittee on ENERGY AND MINERAL RESOURCES.
<u>HR 1915</u> DeFazio (D)	Federal Water Pollution Control Act		Amends the Federal Water Pollution Control Act to reauthorize certain water pollution control programs.	06/22/2021 - From HOUSE Committee on TRANSPORTATION AND INFRASTRUCTURE: Reported as amended.;06/22/2021 - In HOUSE. Placed on HOUSE Union Calendar.
<u>HR 2238</u> Lowenthal A (D)	Single Use Plastic Production Reduction		Amends the Solid Waste Disposal Act to reduce the production and use of certain single-use plastic products and packaging, to improve the responsibility of producers in the design, collection, reuse, recycling, and disposal of their consumer products and packaging, to prevent pollution from consumer products and packaging from entering into animal and human food chains and waterways.	03/29/2021 - In HOUSE Committee on TRANSPORTATION & INFRASTRUCTURE: Referred to Subcommittee on WATER RESOURCES AND ENVIRONMENT.
<u>HR 2467</u> Dingell D (D)	Hazardous Substances		Requires the Administrator of the Environmental Protection Agency to designate per- and polyfluoroalkyl substances as hazardous substances under the Comprehensive Environmental Response, Compensation, and Liability Act of 1980.	07/22/2021 - In SENATE. Read second time.;07/22/2021 - To SENATE Committee on ENVIRONMENT AND PUBLIC WORKS.

IRWD 2022 LEGISLATIVE MATRIX
Updated 05/25/2022

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
<u>HR 2468</u> Garamendi (D)	Federal Infrastructure Aid Program Materials		Ensures that certain materials used in carrying out federal infrastructure aid programs are made in the United States.	06/07/2021 - In HOUSE Committee on AGRICULTURE: Referred to Subcommittee on COMMODITY EXCHANGES, ENERGY, AND CREDIT.
<u>HR 3291</u> Tonko (D)	Water System Assistance		Amends the Safe Drinking Water Act to provide assistance for states, territories, areas affected by natural disasters, and water systems and schools affected by PFAS or lead, and to require the Environmental Protection Agency to promulgate national primary drinking water regulations for PFAS, microcystin toxin, and 1,4-dioxane.	06/29/2021 - From HOUSE Committee on ENERGY AND COMMERCE: Reported as amended.;06/29/2021 - In HOUSE. Placed on HOUSE Union Calendar.
<u>HR 3292</u> Dingell D (D)	Residential Emergency Relief Program		Requires the Administrator of the Environmental Protection Agency to carry out a residential emergency relief program to provide payment assistance for households to retain water service.	05/18/2021 - INTRODUCED.;05/18/2021 - To HOUSE Committee on ENERGY AND COMMERCE.;05/19/2021 - In HOUSE Committee on ENERGY AND COMMERCE: Referred to Subcommittee on ENVIRONMENT.
<u>HR 3293</u> Blunt Rochester (D)	Drinking Water and Wastewater Service Assistance		Amends the Safe Drinking Water Act and the Federal Water Pollution Control Act to establish programs to assist low-income households in maintaining access to drinking water and wastewater services.	06/29/2021 - From HOUSE Committee on ENERGY AND COMMERCE: Reported as amended.
<u>HR 3404</u> Huffman (D)	Drought Preparedness	SUPPORT IF AMENDED	Provides drought preparedness and improved water supply reliability to the nation.	05/20/2021 - INTRODUCED.;05/21/2021 - In HOUSE Committee on ENERGY AND COMMERCE: Referred to Subcommittee on ENVIRONMENT.;05/21/2021 - In HOUSE Committee on TRANSPORTATION & INFRASTRUCTURE: Referred to

IRWD 2022 LEGISLATIVE MATRIX
Updated 05/25/2022

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
				Subcommittee on WATER RESOURCES AND ENVIRONMENT.
<u>HR 3622</u> Pappas (D)	Water Quality Criteria		Requires the Administrator of the Environmental Protection Agency to develop effluent limitations guidelines and standards and water quality criteria for PFAS under the Federal Water Pollution Control Act, provides Federal grants to publicly owned treatment works to implement such guidelines and standards.	06/01/2021 - In HOUSE Committee on TRANSPORTATION & INFRASTRUCTURE: Referred to Subcommittee on WATER RESOURCES AND ENVIRONMENT.
<u>HR 4099</u> Napolitano (D)	Water Recycling and Reuse Projects		Directs the Secretary of the Interior to establish a grant program to provide grants on a competitive basis to eligible entities for large-scale water recycling and reuse projects.	06/29/2021 - Subcommittee on WATER, POWER AND OCEANS hearings held.
<u>HR 4602</u> Lowenthal A (D)	Do Not Flush Labeling	SUPPORT	Directs the Federal Trade Commission to issue regulations requiring certain products to have "Do Not Flush" labeling.	07/21/2021 - INTRODUCED.;07/21/2021 - To HOUSE Committee on ENERGY AND COMMERCE.;07/22/2021 - In HOUSE Committee on ENERGY AND COMMERCE: Referred to Subcommittee on DIGITAL COMMERCE AND CONSUMER PROTECTION.
<u>HR 6591</u> McClain (R)	Disposable Nonwoven Wipes Flushability	SUPPORT	Requires the Administrator of the Environmental Protection Agency to publish a rule that establishes standards for the flushability of disposable nonwoven wipes.	02/03/2022 - INTRODUCED.;02/03/2022 - To HOUSE Committee on ENERGY AND COMMERCE.
<u>HR 6705</u> Blunt Rochester (D)	Improvements to Rivers and Harbors		Provides for improvements to the Rivers and harbors of the United States, to provide for the conservation and development of water and related resources.	02/14/2022 - In HOUSE Committee on TRANSPORTATION & INFRASTRUCTURE: Referred to Subcommittee on WATER RESOURCES AND ENVIRONMENT.
<u>S 914</u> Duckworth (D)	Safe Drinking Water Act		Amends the Safe Drinking Water Act and the Federal Water Pollution Control Act to reauthorize programs under those Acts.	04/29/2021 - In SENATE. Amendment SA 1471 proposed by Senator Rubio to Amendment SA 1460.;04/29/2021 - In SENATE. Amendment SA 1461

IRWD 2022 LEGISLATIVE MATRIX
Updated 05/25/2022

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
				proposed by Senator Shaheen to Amendment SA 1460.;04/29/2021 - In SENATE. Amendment SA 1469 proposed by Senator Kennedy
<u>S 1907</u> Gillibrand (D)	Water Quality Criteria		Requires the Administrator of the Environmental Protection Agency to develop effluent limitations guidelines and standards and water quality criteria for PFAS under the Federal Water Pollution Control Act, to provide Federal grants to publicly owned treatment works to implement such guidelines and standards.	05/27/2021 - INTRODUCED.;05/27/2021 - In SENATE. Read second time.;05/27/2021 - To SENATE Committee on ENVIRONMENT AND PUBLIC WORKS.
<u>S 2454</u> Padilla (D)	Alternative Water Source Projects		Amends the Federal Water Pollution Control Act to reauthorize the pilot program for alternative water source projects.	07/22/2021 - In SENATE. Read second time.;07/22/2021 - To SENATE Committee on ENVIRONMENT AND PUBLIC WORKS.
<u>S 3624</u> Carper (D)	Improvements to Rivers and Harbors		Provides for improvements to the rivers and harbors of the United States, to provide for the conservation and development of water and related resources.	02/10/2022 - INTRODUCED.;02/10/2022 - In SENATE. Read second time.;02/10/2022 - To SENATE Committee on ENVIRONMENT AND PUBLIC WORKS.
<u>S 3956</u> Merkley (D)	Do Not Flush Labeling Requirements	SUPPORT	Directs the Administrator of the Environmental Protection Agency to establish a grant program to improve the effectiveness of education and outreach on Do Not Flush labeling, and to require the Federal Trade Commission, in consultation with the Administrator, to issue regulations requiring certain products to have Do Not Flush labeling.	03/30/2022 - INTRODUCED.;03/30/2022 - In SENATE. Read second time.;03/30/2022 - To SENATE Committee on COMMERCE, SCIENCE, AND TRANSPORTATION.
<u>S 4231</u> Feinstein (D)	Water Infrastructure	SUPPORT	Supports water infrastructure in reclamation States.	05/17/2022 - INTRODUCED.;05/17/2022 - In SENATE. Read second time.;05/17/2022 - To SENATE Committee on ENERGY AND NATURAL RESOURCES.

IRWD 2022 LEGISLATIVE MATRIX
Updated 05/25/2022

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
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June 13, 2022
Prepared by: L. Srader
Submitted by: T. Mitcham
Approved by: Paul A. Cook

CONSENT CALENDAR

ADOPTION OF REVISED IRWD SCHEDULE OF POSITIONS AND SALARY RATE RANGES FOR FISCAL YEAR 2022-23

SUMMARY:

Staff recommends the Board approve the Schedule of Revised Positions and Salary Grades based on a cost-of-living adjustment (COLA) of 7.9%.

BACKGROUND:

For Fiscal Year 2022-23, the proposed changes to the IRWD Salary Grade Schedules incorporate:

- A 7.9% COLA for Managers, Exempt Supervisors, Confidential and Exempt Employees;
- A 7.9% COLA for the General Employee Unit (as provided for in Article IX of the Memorandum of Understanding for the General Employee Unit); and
- A 7.9% COLA for the Non-exempt Supervisor Unit (as provided for in Article IX of the Memorandum of Understanding for the Non-exempt Supervisors Unit).

The proposed COLAs are based on the 12-month change in the Consumer Price Index (CPI) posted by the Bureau of Labor Statistics for the Los Angeles-Long Beach-Anaheim areas. A resolution adopting the proposed changes to the IRWD Salary Grade Schedules is provided as Exhibit "A." Staff recommends the Board adopt a resolution superseding Resolution No. 2022-8 and adopting a revised Schedule of Positions and Salary Rate Ranges effective July 1, 2022.

FISCAL IMPACTS:

A COLA of 3% was included in the Fiscal Year 2022-23 Operating Budget approved by the Board on April 26, 2021. The fiscal impact of a 7.9% COLA to IRWD's approved budget is approximately \$2,000,000.

ENVIRONMENTAL COMPLIANCE:

This item is not a project as defined in the California Environmental Quality Act Code of Regulations, Title 14, Chapter 3, Section 15378.

COMMITTEE STATUS:

This item was not reviewed by a Committee.

RECOMMENDATION:

THAT THE BOARD APPROVE THE REVISED SALARY GRADE SCHEDULE AND ADOPT THE FOLLOWING RESOLUTION BY TITLE:

RESOLUTION NO. 2022-9

RESOLUTION OF THE BOARD OF DIRECTORS OF THE
IRVINE RANCH WATER DISTRICT SUPERSEDING
RESOLUTION NO. 2022-8 AND ADOPTING A REVISED
SCHEDULE OF POSITIONS AND SALARY RATE RANGES
FOR THE GENERAL UNIT, NON-EXEMPT SUPERVISOR
UNIT, AND FOR MANAGERS, EXEMPT SUPERVISORS,
CONFIDENTIAL AND EXEMPT EMPLOYEES

LIST OF EXHIBITS:

Exhibit "A" – Resolution of the Board of Directors of the Irvine Ranch Water District adopting
a new Schedule of Positions and Salary Rate Ranges

Exhibit "B" – Salary Grade Schedule

EXHIBIT "A"

RESOLUTION NO. 2022-9

RESOLUTION OF THE BOARD OF DIRECTORS OF
IRVINE RANCH WATER DISTRICT, SUPERSEDING
RESOLUTION NO. 2022-8 AND ADOPTING A REVISED
SCHEDULE OF POSITIONS AND SALARY RATE RANGES

The Board of Directors of Irvine Ranch Water District, by adoption of Resolution No. 2022-8 on April 25, 2022, established a Schedule of Positions and Salary Rate Ranges of the Irvine Ranch Water District; and

The Board of Directors of Irvine Ranch Water District have reviewed the Schedule of Positions and Salary Rate Ranges and desires to make revisions thereto.

The Board of Directors of Irvine Ranch Water District does hereby resolve, determine and order as follows:

Section 1. That the Schedule of Positions and Salary Rate Ranges adopted by Resolution No. 2022-8 on April 25, 2022, is hereby superseded effective July 1, 2022.

Section 2. That the revised Schedule of Positions and Salary Rate Ranges for the Irvine Ranch Water District as set forth in Exhibit "B" attached to this Resolution, and is effective July 1, 2022, for all classifications, is hereby approved and adopted.

ADOPTED, SIGNED and APPROVED on June 13, 2022.

President, IRVINE RANCH WATER DISTRICT
and of the Board of Directors thereof

Secretary, IRVINE RANCH WATER DISTRICT
and of the Board of Directors thereof

APPROVED AS TO FORM:

Hanson Bridgett LLP

By: _____
District Counsel

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EXHIBIT "B"

Schedule "B"

**IRVINE RANCH WATER DISTRICT
MONTHLY SALARY GRADE SCHEDULE**

Managers, Exempt Supervisors, Confidential & Exempt Employees

Effective July 1, 2022

	MINIMUM	MAXIMUM	EXCEPTIONAL PERFORMANCE TOP OF RANGE
<u>NON-EXEMPT</u>			
Salary Grade U1.N	\$3,415	\$4,235	\$4,446
Salary Grade U2.N	\$3,489	\$4,351	\$4,569
Salary Grade U3.N	\$3,562	\$4,470	\$4,694
Salary Grade U4.N	\$3,628	\$4,600	\$4,831
Salary Grade U5.N	\$3,713	\$4,729	\$4,964
Salary Grade U6.N	\$3,784	\$4,864	\$5,106
Salary Grade U7.N	\$3,860	\$4,999	\$5,249
Salary Grade U8.N	\$3,945	\$5,143	\$5,399
Salary Grade U9.N	\$4,018	\$5,285	\$5,548
Salary Grade U10.N	\$4,101	\$5,431	\$5,703
Salary Grade U11.N	\$4,183	\$5,569	\$5,848
Salary Grade U12.N	\$4,264	\$5,732	\$6,018
Salary Grade U13.N	\$4,345	\$5,895	\$6,190
Salary Grade U14.N	\$4,443	\$6,063	\$6,367
Salary Grade U15.N	\$4,538	\$6,224	\$6,536
Salary Grade U16.N	\$4,645	\$6,398	\$6,718
Salary Grade U17.N	\$4,742	\$6,559	\$6,887
Salary Grade U18.N	\$4,848	\$6,734	\$7,070
Salary Grade U19.N	\$4,957	\$6,904	\$7,249
Safety Assistant			
Salary Grade U20.N	\$5,089	\$7,127	\$7,485

	MINIMUM	MAXIMUM	EXCEPTIONAL PERFORMANCE TOP OF RANGE
Salary Grade U21.N	\$5,235	\$7,342	\$7,710
Salary Grade U22.N	\$5,377	\$7,575	\$7,954
Executive Secretary Human Resources Assistant			
Salary Grade U23.N	\$5,521	\$7,803	\$8,193
Salary Grade U24.N	\$5,677	\$8,046	\$8,448
Salary Grade U25.N	\$5,826	\$8,292	\$8,707
Human Resources Technician			
Salary Grade U26.N	\$6,006	\$8,542	\$8,968
Executive Assistant			
Salary Grade U27.N	\$6,178	\$8,791	\$9,232
Salary Grade U28.N	\$6,360	\$9,051	\$9,504
Salary Grade U29.N	\$6,550	\$9,315	\$9,781
Administrative Assistant Safety Specialist			
Salary Grade U30.N	\$6,748	\$9,592	\$10,072
Salary Grade U31.N	\$6,947	\$9,880	\$10,374
Human Resources Analyst			
Salary Grade U32.N	\$7,147	\$10,173	\$10,681
Salary Grade U33.N	\$7,356	\$10,468	\$10,991
Network Administrator User Support Administrator			
Salary Grade U34.N	\$7,575	\$10,757	\$11,294
Salary Grade U35.N	\$7,803	\$11,081	\$11,636

	MINIMUM	MAXIMUM	EXCEPTIONAL PERFORMANCE TOP OF RANGE
EXEMPT			
Salary Grade U1.E	\$5,492	\$7,056	\$7,409
Salary Grade U2.E	\$5,676	\$7,330	\$7,697
Salary Grade U3.E	\$5,857	\$7,603	\$7,983
Salary Grade U4.E	\$6,040	\$7,895	\$8,290
Salary Grade U5.E	\$6,224	\$8,187	\$8,596
Salary Grade U6.E	\$6,438	\$8,505	\$8,930
Salary Grade U7.E	\$6,644	\$8,820	\$9,261
Salary Grade U8.E	\$6,861	\$9,164	\$9,622
Salary Grade U9.E	\$7,071	\$9,501	\$9,976
Salary Grade U10.E	\$7,305	\$9,860	\$10,353
Asset Systems Analyst Assistant Engineer Customer Service Supervisor Development Services Supervisor Digital Communications Specialist Management Analyst Senior Public Affairs Specialist			
Salary Grade U11.E	\$7,540	\$10,224	\$10,735
Purchasing Supervisor			
Salary Grade U12.E	\$7,784	\$10,617	\$11,148
Environmental Compliance Analyst Financial Analyst Regulatory Compliance Administrator Senior Accountant Senior Water Efficiency Analyst Water Efficiency Supervisor			
Salary Grade U13.E	\$8,036	\$11,001	\$11,551
Communications Analyst/Deputy PIO GIS Supervisor Legislative Analyst Right of Way Agent Senior Human Resources Analyst Treasury Analyst Water Resources Planner			

	MINIMUM	MAXIMUM	EXCEPTIONAL PERFORMANCE TOP OF RANGE
Salary Grade U14.E Accounting Supervisor Associate Engineer District Secretary QA/QC Compliance Administrator	\$8,296	\$11,426	\$11,997
Salary Grade U15.E Applications Analyst Automation Programmer Laboratory Supervisor Senior Regulatory Compliance Administrator Senior SCADA Network Administrator Senior Network Administrator	\$8,561	\$11,854	\$12,447
Salary Grade U16.E	\$8,847	\$12,301	\$12,916
Salary Grade U17.E Construction Inspection Manager Customer Service Manager Engineer Facilities/Fleet Manager Purchasing Manager Safety Manager Senior Energy and Water Resources Planner	\$9,128	\$12,754	\$13,392
Salary Grade U18.E Collection Systems Manager Community Relations Manager Construction Services Manager Cybersecurity Analyst Electrical and Instrumentation Manager Field Services Manager Natural Resources Manager Public Affairs Manager Regulatory Compliance Manager Senior Applications Analyst Senior Applications Developer Senior Database Administrator Water Efficiency Manager Water Quality Manager	\$9,425	\$13,239	\$13,901
Salary Grade U19.E Manager of Risk & Contracts Administration Mechanical Services Manager Recycled Water Development Manager Treasury Manager Water Resources Manager	\$9,723	\$13,728	\$14,414

	MINIMUM	MAXIMUM	EXCEPTIONAL PERFORMANCE TOP OF RANGE
Salary Grade U20.E Automation Manager Operations Manager Reliability Engineer Senior Engineer User Support Manager	\$10,026	\$14,238	\$14,950
Salary Grade U21.E Controller Manager of Strategic Planning and Analysis	\$10,331	\$14,752	\$15,490
Salary Grade U22.E Applications Manager Network and Cybersecurity Manager Principal Engineer	\$10,663	\$15,300	\$16,065
Salary Grade U23.E	\$11,000	\$15,855	\$16,648
Salary Grade U24.E Engineering Manager	\$11,299	\$16,494	\$17,319
Salary Grade U25.E	\$11,648	\$17,116	\$17,972
Salary Grade U26.E	\$12,180	\$18,021	\$18,922
Salary Grade U27.E Director of Field Operations Director of Human Resources Director of Information Services Director of Maintenance Director of Strategic Communications & Advocacy/ Deputy General Counsel Director of Recycling Operations Director of Safety & Security Director of Water Quality & Regulatory Compliance Director of Water Resources Treasurer/Director of Risk Management	\$12,737	\$18,977	\$19,926
Salary Grade U28.E	\$13,322	\$19,976	\$20,975
Salary Grade U29.E	\$13,931	\$21,033	\$22,085

	MINIMUM	MAXIMUM	EXCEPTIONAL PERFORMANCE TOP OF RANGE
Salary Grade U30.E Executive Director of Finance Executive Director of Technical Services Executive Director of Operations Executive Director of Water Policy	\$14,574	\$22,151	\$23,259
Salary Grade U31.E	\$15,299	\$23,407	\$24,577
Salary Grade U32.E	\$16,065	\$24,739	\$25,976
Salary Grade U33.E	\$16,865	\$26,144	\$27,451
Salary Grade U34.E General Manager	\$17,711	\$27,628	\$30,599

IRVINE RANCH WATER DISTRICT
MONTHLY SALARY GRADE SCHEDULE
Non-Exempt Supervisors Unit
Effective July 1, 2022

	MINIMUM	MAXIMUM	EXCEPTIONAL PERFORMANCE TOP OF RANGE
<u>NON-EXEMPT</u>			
Salary Grade S26.N	\$6,006	\$8,542	\$8,968
Salary Grade S27.N	\$6,178	\$8,791	\$9,232
Salary Grade S28.N	\$6,360	\$9,051	\$9,504
Salary Grade S29.N	\$6,550	\$9,315	\$9,781
Salary Grade S30.N	\$6,748	\$9,592	\$10,072
Salary Grade S31.N Facilities Services Supervisor Fleet Supervisor	\$6,947	\$9,880	\$10,374
Salary Grade S32.N Collection Systems Supervisor Mechanical Services Supervisor	\$7,147	\$10,173	\$10,681
Salary Grade S33.N Cross Connection Supervisor Water Maintenance Supervisor	\$7,356	\$10,468	\$10,991
Salary Grade S34.N Construction Inspection Supervisor Automation Supervisor Electrical Supervisor Instrumentation Supervisor Water Monitoring Supervisor	\$7,575	\$10,757	\$11,294
Salary Grade S35.N Operations Supervisor	\$7,803	\$11,081	\$11,636

IRVINE RANCH WATER DISTRICT
MONTHLY SALARY GRADE SCHEDULE
General Employees Unit
Effective July 1, 2022

	MINIMUM	MAXIMUM	EXCEPTIONAL PERFORMANCE TOP OF RANGE
<u>NON-EXEMPT</u>			
Salary Grade 1.N	\$3,409	\$4,228	\$4,439
Salary Grade 2.N	\$3,482	\$4,342	\$4,559
Salary Grade 3.N	\$3,557	\$4,462	\$4,685
Salary Grade 4.N	\$3,623	\$4,592	\$4,820
Salary Grade 5.N	\$3,701	\$4,718	\$4,954
Salary Grade 6.N	\$3,777	\$4,855	\$5,098
	Office Assistant Mail Coordinator		
Salary Grade 7.N	\$3,850	\$4,990	\$5,240
Salary Grade 8.N	\$3,936	\$5,134	\$5,391
Salary Grade 9.N	\$4,014	\$5,276	\$5,540
Salary Grade 10.N	\$4,092	\$5,418	\$5,689
Salary Grade 11.N	\$4,172	\$5,559	\$5,836
	Material Control Clerk I Utility Worker		
Salary Grade 12.N	\$4,255	\$5,720	\$6,006
Salary Grade 13.N	\$4,335	\$5,886	\$6,181
	Customer Service Specialist I Support Specialist		
Salary Grade 14.N	\$4,434	\$6,051	\$6,354
Salary Grade 15.N	\$4,527	\$6,211	\$6,521
	Collection Systems Technician I Office Specialist		

	MINIMUM	MAXIMUM	EXCEPTIONAL PERFORMANCE TOP OF RANGE
Salary Grade 16.N Accounting Clerk Customer Service Field Technician Metering Systems Technician I Water Maintenance Technician I	\$4,635	\$6,387	\$6,706
Salary Grade 17.N Customer Service Specialist II	\$4,732	\$6,543	\$6,871
Salary Grade 18.N Material Control Clerk II Senior Support Specialist	\$4,836	\$6,722	\$7,058
Salary Grade 19.N Development Services Specialist Purchasing Coordinator Senior Office Specialist	\$4,947	\$6,892	\$7,237
Salary Grade 20.N Collection Systems Technician II Engineering Technician I GIS Technician I Operator I Senior Accounting Clerk	\$5,080	\$7,112	\$7,467
Salary Grade 21.N Collection Systems CCTV Technician Customer Service Specialist III Senior Customer Service Field Technician	\$5,223	\$7,329	\$7,694
Salary Grade 22.N Facilities Services Technician Maintenance Mechanic Metering Systems Technician II Risk Assistant Senior Purchasing Coordinator Vehicle/Equipment Mechanic Water Maintenance Technician II	\$5,368	\$7,557	\$7,935
Salary Grade 23.N Senior Water Efficiency Field Technician	\$5,509	\$7,788	\$8,178

	MINIMUM	MAXIMUM	EXCEPTIONAL PERFORMANCE TOP OF RANGE
Salary Grade 24.N Buyer Public Affairs Assistant Recycled Water Specialist Water Loss Prevention Specialist Wetlands Specialist	\$5,663	\$8,032	\$8,434
Salary Grade 25.N Engineering Technician II GIS Technician II Senior Collection Systems CCTV Technician Senior Collection Systems Technician	\$5,814	\$8,278	\$8,693
Salary Grade 26.N Cross Connection Specialist Metering Systems Technician III Water Efficiency Specialist Water Maintenance Technician III Water Resources Specialist	\$5,992	\$8,525	\$8,951
Salary Grade 27.N Accountant Operator II Senior Facilities Services Technician Senior Maintenance Mechanic Senior Water Loss Prevention Specialist Senior Vehicle/Equipment Maintenance Mechanic	\$6,165	\$8,776	\$9,214
Salary Grade 28.N Automation Technician Construction Inspector Electrical Technician Instrumentation Technician Landscape Contracts Administrator Scientist	\$6,346	\$9,036	\$9,488
Salary Grade 29.N Engineering Technician III Digital Communications Specialist GIS Technician III Operator III Senior Buyer Senior Recycled Water Specialist Senior Wetlands Specialist	\$6,535	\$9,299	\$9,764

	MINIMUM	MAXIMUM	EXCEPTIONAL PERFORMANCE TOP OF RANGE
Salary Grade 30.N Graphic Design Specialist Risk Analyst Senior Electrical Technician Senior Instrumentation Technician	\$6,734	\$9,571	\$10,050
Salary Grade 31.N Information Services Coordinator Payroll Administrator Recycled Water Project Specialist Senior Construction Inspector Senior Water Efficiency Specialist	\$6,932	\$9,863	\$10,357
Salary Grade 32.N Asset Maintenance Coordinator Automation Specialist Environmental Compliance Specialist Process Specialist Senior Scientist Wetlands Scientist	\$7,131	\$10,152	\$10,660
Salary Grade 33.N Operations Coordinator Water Efficiency Analyst	\$7,341	\$10,447	\$10,969
Salary Grade 34.N	\$7,557	\$10,738	\$11,275
Salary Grade 35.N	\$7,786	\$11,059	\$11,612

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June 13, 2022

Prepared by: E. Lin

Submitted by: C. Clary

Approved by: Paul A. Cook



CONSENT CALENDAR

LUMP SUM PAYMENT OPTION FOR EMPLOYER CONTRIBUTIONS FOR FISCAL YEAR 2022-23 TO THE CALIFORNIA PUBLIC EMPLOYEES' RETIREMENT SYSTEM

SUMMARY:

IRWD typically chooses to pay the Annual Unfunded Accrued Liability (UAL) "Prepayment Option" in order to reduce overall costs to the District. Staff recommends the Board approve a lump sum payment option for employer contributions to the California Public Employees' Retirement System (CalPERS) by making a one-time contribution of \$7,828,346 to CalPERS for IRWD's Fiscal Year (FY) 2022-23.

BACKGROUND:

The total minimum required employer contribution to CalPERS is the sum of the CalPERS Plan's Employer Normal Cost Rate (expressed as a percentage of payroll) plus the employer UAL contribution amount (billed monthly in dollars). Beginning in FY 2009-10, IRWD has elected to utilize the lump sum payment option for the total minimum required employer contribution as the District benefits from not incurring interest expense at the assumed actuarial interest rate, which is currently 7.00%.

Beginning five years ago, CalPERS changed its rules so that only the UAL portion of the employer contribution can be prepaid in full no later than July 31 of each year. The normal cost contributions for IRWD, estimated to be \$3.8 million, will be made as part of the bi-weekly payroll reporting process. CalPERS has indicated that IRWD's UAL lump sum payment for FY 2022-23 will be \$7,828,346, as shown in Exhibit "A". The total UAL cost of choosing the monthly payments option is approximately \$8,097,704, so the lump sum payment option saves IRWD approximately \$269,358 this fiscal year.

FISCAL IMPACTS:

IRWD's approved operating budget for FY 2022-23 includes normal and UAL employer contributions of \$11.4 million. The payments are consistent with the impacts identified in setting rates for FY 2022-23. The Operating Fund will fund this UAL lump sum payment.

ENVIRONMENTAL COMPLIANCE:

This item is not a project as defined in the California Environmental Quality Act Code of Regulations, Title 14, Chapter 3, Section 15378.

COMMITTEE STATUS:

This item was reviewed by the Finance and Personnel Committee on June 7, 2022.

Consent Calendar: Lump Sum Payment Option for Employer Contributions for FY 2022-23 to
the California Public Employees' Retirement System

June 13, 2022

Page 2

RECOMMENDATION:

THAT THE BOARD APPROVE THE LUMP SUM PAYMENT FOR EMPLOYER CONTRIBUTIONS TO THE CALIFORNIA PUBLIC EMPLOYEES' RETIREMENT SYSTEM BY MAKING A ONE-TIME CONTRIBUTION OF \$7,828,346 FOR IRWD'S FISCAL YEAR 2022-23 EMPLOYER UNFUNDED ACCRUED LIABILITY CONTRIBUTION.

LIST OF EXHIBITS:

Exhibit "A" – Letter from CalPERS Regarding Lump Sum Prepayment Amount

Exhibit "A"

Required Contributions

	Fiscal Year
Required Employer Contribution	2022-23
Employer Normal Cost Rate	9.19%
<i>Plus, Either</i>	
1) Monthly Employer Dollar UAL Payment	\$674,809
<i>Or</i>	
2) Annual UAL Prepayment Option*	\$7,828,346
Required PEPRAs Member Contribution Rate	6.50%
<p><i>The total minimum required employer contribution is the sum of the Plan's Employer Normal Cost Rate (expressed as a percentage of payroll) and the Employer Unfunded Accrued Liability (UAL) Contribution Amount (billed monthly in dollars).</i></p> <p><i>* Only the UAL portion of the employer contribution can be prepaid (which must be received in full no later than July 31). Any prepayment totaling over \$5 million requires a 72-hour notice email to FCSD_public_agency_wires@calpers.ca.gov. Plan Normal Cost contributions will be made as part of the payroll reporting process. If there is contractual cost sharing or other change, this amount will change.</i></p> <p><i>In accordance with Sections 20537 and 20572 of the Public Employees' Retirement Law, if a contracting agency fails to remit the required contributions when due, interest and penalties may apply.</i></p> <p><i>For additional detail regarding the determination of the required contribution for PEPRAs members, see "PEPRAs Member Contribution Rates" in the "Liabilities and Contributions" section. Required member contributions for Classic members can be found in Appendix B.</i></p>	

	Fiscal Year 2021-22	Fiscal Year 2022-23
Normal Cost Contribution as a Percentage of Payroll		
Total Normal Cost	16.60%	16.47%
Employee Contribution ¹	7.33%	7.28%
Employer Normal Cost ²	9.27%	9.19%
Projected Annual Payroll for Contribution Year	\$39,473,694	\$40,859,881
Estimated Employer Contributions Based On Projected Payroll		
Total Normal Cost	\$6,552,633	\$6,729,622
Employee Contribution ¹	2,893,422	2,974,599
Employer Normal Cost²	3,659,211	3,755,023
Unfunded Liability Contribution	7,045,451	8,097,704
% of Projected Payroll (illustrative only)	17.85%	19.82%
Estimated Total Employer Contribution	\$10,704,662	\$11,852,727
% of Projected Payroll (illustrative only)	27.12%	29.01%

¹ For classic members, this is the percentage specified in the Public Employees' Retirement Law, net of any reduction from the use of a modified formula or other factors. For PEPRAs members, the member contribution rate is based on 50% of the normal cost. A development of PEPRAs member contribution rates can be found in the "Liabilities and Contributions" section. Employee cost sharing is not shown in this report.

² The Employer Normal Cost is a blended rate for all benefit groups in the plan. For a breakout of normal cost by benefit group, see "Normal Cost by Benefit Group" in the "Liabilities and Contributions" section.

Actuarial Assumptions

In 2017, CalPERS completed its most recent asset liability management study incorporating actuarial assumptions and strategic asset allocation. In December 2017, the CalPERS Board of Administration adopted relatively modest changes to the asset allocation that reduced the expected volatility of returns. The adopted asset allocation was expected to have a long-term blended return that continued to support a discount rate assumption of 7.00%. The Board also approved several changes to the demographic assumptions that more closely aligned with actual experience.

On December 21, 2016, the CalPERS Board of Administration lowered the discount rate from 7.50% to 7.00% using a three-year phase-in beginning with the June 30, 2016 actuarial valuations. **The minimum employer contributions for fiscal year 2022-23 determined in this valuation were calculated using a discount rate of 7.00%.** The decision to reduce the discount rate was primarily based on reduced capital market assumptions provided by external investment consultants and CalPERS investment staff. The specific decision adopted by the Board reflected recommendations from CalPERS staff and additional input from employer and employee stakeholder groups. Based on the investment allocation adopted by the Board and capital market assumptions, the reduced discount rate schedule provides a more realistic assumption for the long-term investment return of the fund.

Notwithstanding the Board's decision to phase into a 7.00% discount rate, subsequent analysis of the expected investment return of CalPERS assets or changes to the investment allocation may result in a change to this discount rate schedule.

For more details and additional rationale for the selection of the actuarial assumptions, please refer to the CalPERS Experience Study and Review of Actuarial Assumptions report from December 2017 that can be found on the CalPERS website under: "Forms and Publications". Click on "View All" and search for Experience Study.

All actuarial assumptions (except the discount rates used for the hypothetical termination liability) represent an estimate of future experience rather than observations of the estimates inherent in market data.

Economic Assumptions

Discount Rate

The prescribed discount rate assumption, adopted by the Board on December 21, 2016, is 7.00% compounded annually (net of investment and administrative expenses) as of June 30, 2020.

Termination Liability Discount Rate

The current discount rate assumption used for termination valuations is a weighted average of the 10-year and 30-year U.S. Treasury yields where the weights are based on matching asset and liability durations as of the termination date.

The hypothetical termination liabilities in this report are calculated using an observed range of market interest rates. This range is based on the lowest and highest 20-year Treasury bond observed during an approximate 19-month period from 12 months before the valuation date to 7 months after. The 20-year Treasury bond has a similar duration to most plan liabilities and serves as a good proxy for the termination discount rate. The 20-year Treasury yield was 1.18% on June 30, 2020.



BENEFITS AND EMPLOYMENT TAX

HEALTH INSURANCE AND EMPLOYER CONTRIBUTIONS FY 2022-23


	<u>FY 2021-22</u>	<u>FY 2022-23</u>	<u>Change</u>
Insurance and Benefits			
Health Ins Actives	\$ 7,096	\$ 7,450	\$ 354
Paid Time Off	5,185	5,559	374
Dental Premiums	511	524	13
Wrkrs Comp Premiums	750	825	75
Wrkrs Comp Paid Claims	772	772	-
Life Ins Actives	180	180	-
LT Disability Premiums	174	174	-
Medical Premiums - Retirees	425	425	-
Vision Benefit Premiums	98	98	-
RHCAP Payments - OPEB	351	351	-
Life Ins Retirees	13	13	-
Other	185	187	2
	<u>\$ 15,740</u>	<u>\$ 16,558</u>	<u>\$ 818</u>
Employment Tax and PERS			
PERS Employer Portion	\$ 10,690	\$ 11,388	\$ 698
PERS In Excess Of ARC	2,024	1,914	(110)
401A Employer Match Portion	1,006	1,052	46
401A Employer Direct Portion	402	421	19
Medicare Tax	572	598	26
St Unemployment Tax	50	50	-
	<u>\$ 14,744</u>	<u>\$ 15,423</u>	<u>\$ 679</u>
Total Insurance, Benefits, and Taxes	<u>\$ 30,484</u>	<u>\$ 31,981</u>	<u>\$ 1,497</u>

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June 13, 2022

Prepared by: T. Bonkowski / M. Cortez

Submitted by: K. Burton

Approved by: Paul A. Cook 

CONSENT CALENDAR

IRVINE BUSINESS COMPLEX APPURTENANCE RELOCATIONS CONSTRUCTION AWARD

SUMMARY:

The Irvine Business Complex (IBC) Appurtenance Relocations project will relocate and replace water distribution pipeline appurtenances that will be impacted by the City of Irvine's IBC Sidewalk Improvement project. Staff recommends the Board:

- Authorize the addition of Project 12053 to the FY 2021-22 Capital Budget in the amount of \$908,000, and
- Authorize the General Manager to execute a construction contract with T.E. Roberts, Inc. in the amount of \$557,303 for the IBC Appurtenance Relocations.

BACKGROUND:

IRWD received a notice from the City of Irvine regarding the City's upcoming project to construct concrete sidewalks in the IBC along the streets of Cartwright Road and Beckman, Derian, Gillette, Hale, Kelvin, McGaw, Murphy, and Noyes Avenues. Staff reviewed the proposed sidewalk locations and noted that existing IRWD meters, fire hydrants, and backflow devices conflict with the proposed sidewalks and will require relocation prior to the City's project. A project location map is provided as Exhibit "A".

Construction Bid Process:

In August 2021, IRWD retained MBF Consulting, Inc. to provide engineering design services for the project. MBF completed the design in April 2022 and the project was advertised for construction bidding to a select list of 19 contractors. The bid opening was held on May 24, 2022, with four bids received and is summarized below:

Bidder	Bid Amount
T.E. Roberts Construction, Inc.	\$557,303
Paulus Engineering, Inc.	\$677,722
GCI Construction, Inc.	\$691,550
Ferreira Construction	\$728,800
<i>Engineer's Estimate</i>	<i>\$592,500</i>

T.E. Roberts, Inc. is the apparent low bidder with a bid of \$557,303; the bid information is provided as Exhibit "B". Having successfully constructed several IRWD projects in the past, including a previous appurtenance relocation project in the IBC, T.E. Roberts, Inc. is well qualified to construct the project's improvements.

FISCAL IMPACTS:

Project 12053 needs to be added to the FY 2021-22 Capital Budget in the amount shown below.

Project No.	Current Budget	Addition <Reduction>	Total Budget
12053	\$0	\$908,000	\$908,000

This budget amount includes consultant costs (e.g., design fees, engineering services during construction), staff time, and contingency.

ENVIRONMENTAL COMPLIANCE:

The City of Irvine is the lead agency for CEQA compliance for the IBC. The appurtenances are included as part of the Environmental Impact Report for the Draft IBC Vision Plan and Mixed-Use Zoning Code, SCH #2007011024, certified July 15, 2010.

COMMITTEE STATUS:

Construction awards are not typically taken to Committee prior to submittal to the Board.

RECOMMENDATION:

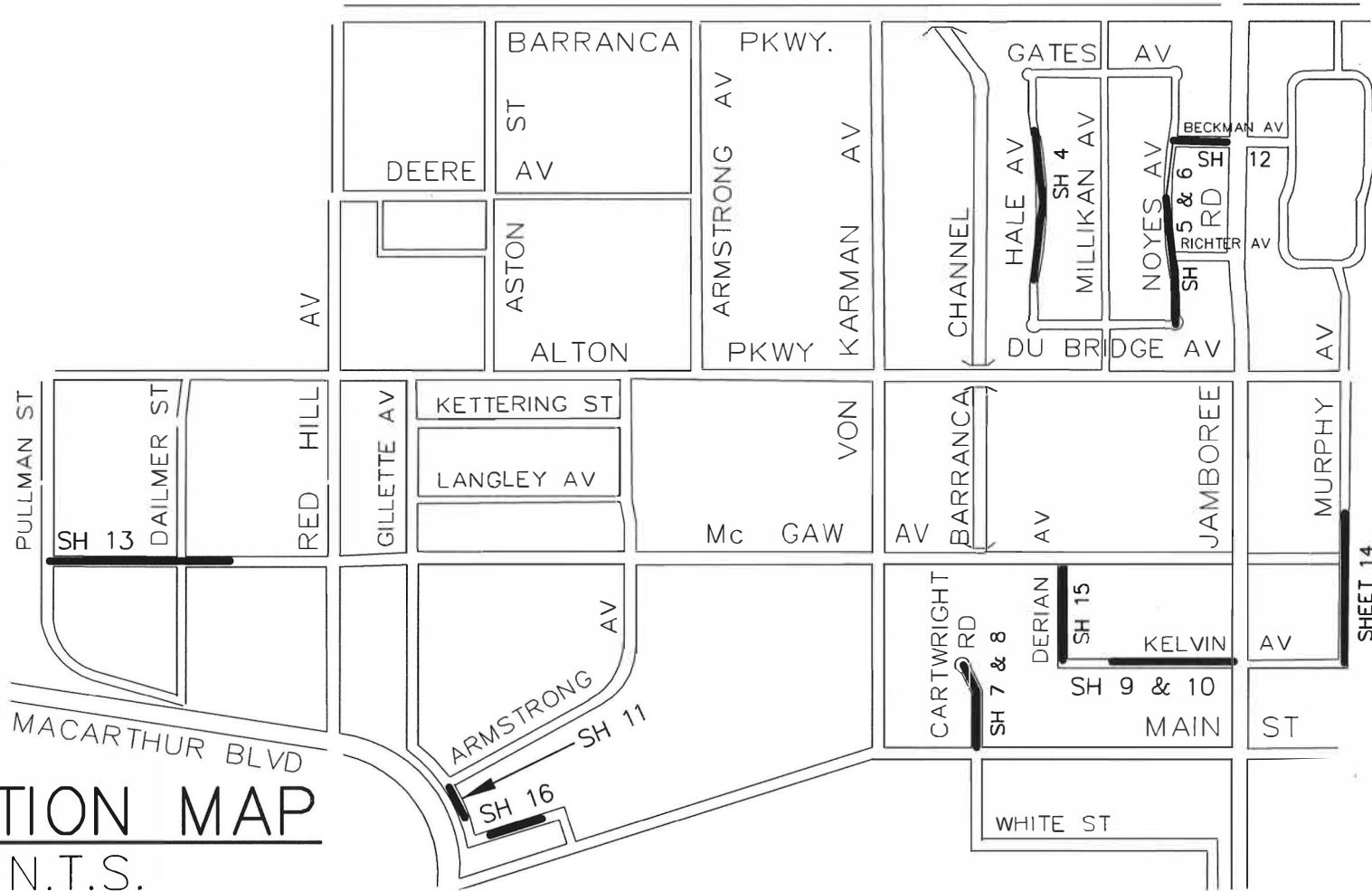
THAT THE BOARD AUTHORIZE THE ADDITION OF PROJECT 12053 TO THE FISCAL YEAR 2021-22 CAPITAL BUDGET IN THE AMOUNT OF \$908,000 AND AUTHORIZE THE GENERAL MANAGER TO EXECUTE A CONSTRUCTION CONTRACT WITH T.E. ROBERTS, INC. IN THE AMOUNT OF \$557,303 FOR THE IRVINE BUSINESS COMPLEX APPURTENANCE RELOCATIONS, PROJECT 12053.

LIST OF EXHIBITS:

Exhibit "A" – Location Map

Exhibit "B" – Bid Results

Exhibit "A"



LOCATION MAP
N.T.S.

N.T.S.

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EXHIBIT "B"

Bid Results

Bidder Details

Vendor Name T. E. Roberts, Inc.
Address 306 W. Katella Avenue, Unit B
 Orange, California 92867
 United States
Respondee Brian Wagner
Respondee Title Estimator
Phone 714-669-0072
Email estimating@teroberts.com
Vendor Type CADIR
License # 603008
CADIR 1000000280

Bid Detail

Bid Format Electronic
Submitted 05/24/2022 9:10 AM (PDT)
Delivery Method
Bid Responsive
Bid Status Submitted
Confirmation # 292855

Respondee Comment

Buyer Comment

Attachments

File Title	File Name	File Type
TER Bid IRWD IBC Appurtenance Relocation.pdf	TER Bid IRWD IBC Appurtenance Relocation.pdf	Bid Form

Subcontractors

Showing 1 Subcontractor

Name & Address	Desc	License Num	CADIR	Amount	Type
Orange County Striping Services 183 N. Pixley Street Orange, California 92868	Striping	346095	1000005547	\$3,500.00	

Line Items

Discount Terms No Discount

Item #	Item Code	Type	Item Description	UOM	QTY	Unit Price	Line Total	Response	Comment
BASE BID ITEMS							\$557,303.00		
1			Mobilization, demobilization, cleanup and spoil disposal (not to exceed 5% of Total Amount of Bid)	LS	1	\$20,619.00	\$20,619.00	Yes	
2			Remove and dispose existing 1- inch service and meter box. Install new 1-inch copper service (including corp. stop; excluding saddle) from main at near side of street as shown and specified on plans per IRWD Std. Dwg. W-1	EA	4	\$9,111.00	\$36,444.00	Yes	
3			Remove and dispose existing 2- inch service, meter box, PRV and box. Install new 2-inch copper service (including corp. stop; excluding saddle) from main, including PRV and box and reconnect to customer plumbing as shown and specified on plans (Detail "FF" on Noyes Ave.) per IRWD Std. Dwg. W-2	LS	1	\$23,599.00	\$23,599.00	Yes	
4			Remove and dispose existing 2-inch service and meter box. Install new 2-inch copper service (including corp. stop) from main at near side of street as shown and specified on plans per IRWD Std. Dwg. W-2	EA	5	\$10,510.00	\$52,550.00	Yes	
5			Remove and dispose existing 2-inch service and meter box. Install new 2-inch copper service (including corp. stop; and saddle) from main at near side of street as shown and specified on plans (Gillette Ave. Detail "X") per IRWD Std. Dwg. W-2	LS	1	\$10,994.00	\$10,994.00	Yes	
6			Remove and dispose existing service and Backflow Assembly. Furnish and install new 2-inch service and Reduced Pressure Principle Backflow Assembly including all connections as shown and specified on plans per IRWD Std. Dwg. W-7	EA	5	\$17,674.00	\$88,370.00	Yes	
7			Remove and dispose existing 2-inch service from main (far side of street) and Backflow Assembly. Furnish and install new 2-inch service and Reduced Pressure Principle Backflow Assembly including all connections as shown and specified on plans per IRWD Std. Dwg. W-7	LS	1	\$20,837.00	\$20,837.00	Yes	
8			Remove and replace existing fire hydrant as shown and specified on plans per IRWD Std. Dwg. W-8.	EA	1	\$18,313.00	\$18,313.00	Yes	
9			Adjust existing fire hydrant with respect to new sidewalk elevation as shown on plans per IRWD Std. Dwg. W-8.	EA	8	\$2,942.00	\$23,536.00	Yes	
10			Remove and dispose existing 6-inch fire line backflow assembly, piping and concrete vault. Furnish and install 6-inch double check (N-Pattern) backflow assembly, including gate valve, hot tap, piping, all appurtenances and connections as shown and specified on plans (Detail "B" on Hale Ave.) per IRWD Std. Dwg. W-6	LS	1	\$55,056.00	\$55,056.00	Yes	
11			Remove and dispose existing 6-inch fire line backflow assembly, piping and concrete vault. Furnish and install 6-inch double check (N-Pattern) backflow assembly, including gate valve, hot tap, piping, all appurtenances and connections as shown and specified on plans (Detail "E" on Noyes Ave.) per IRWD Std. Dwg. W-6	LS	1	\$54,668.00	\$54,668.00	Yes	
12			Remove and dispose existing 6-inch fire line backflow assembly, piping and concrete vault. Furnish and install 6-inch double check (N-Pattern) backflow assembly, including gate valve, hot tap, piping, all appurtenances and connections as shown and specified on plans (Detail "DD" on Gillette Ave.) per IRWD Std. Dwg. W-6	LS	1	\$55,713.00	\$55,713.00	Yes	
13			Remove and dispose existing 6-inch fire line backflow assembly, piping and concrete vault. Furnish and install 6-inch double check (N-Pattern) backflow assembly, including gate valve, piping, all appurtenances and connections as shown and specified on plans (Detail "T" on Murphy Ave.) per IRWD Std. Dwg. W-6	LS	1	\$45,082.00	\$45,082.00	Yes	
14			Remove existing 6-inch double check fire service assembly, relocate to the back of sidewalk and reconnect to the existing inlet and outlet pipes including, pipeline & all appurtenances and connections complete in place as shown and specified on plans. (Detail "S" on McGaw Ave. East of Pullman) per IRWD Std. Dwg. W-6	LS	1	\$32,290.00	\$32,290.00	Yes	
15			Trench Safety Measures	LS	1	\$5,155.00	\$5,155.00	Yes	
16			Traffic Control	LS	1	\$12,577.00	\$12,577.00	Yes	
17			Record Drawings	LS	1	\$1,500.00	\$1,500.00	Yes	
ADDITIVE AND DEDUCTIVE BID ITEMS							\$0.00		
18			ADDITION (+) OR DEDUCTION (-)	LS	1	\$0.00	\$0.00	Yes	


Line Item Subtotals

Section Title	Line Total
BASE BID ITEMS	\$557,303.00
ADDITIVE AND DEDUCTIVE BID ITEMS	\$0.00
Grand Total	\$557,303.00

June 13, 2022

Prepared by: C. Spangenberg / M. Cortez

Submitted by: K. Burton

Approved by: Paul A. Cook 

CONSENT CALENDAR

REHABILITATION OF DYER ROAD WELLFIELD WELL 1, 11, AND 13 FINAL ACCEPTANCE

SUMMARY:

The Rehabilitation of Dyer Road Wellfield (DRWF) Wells 1, 11, and 13 project is complete. IRWD's contractor Best Drilling and Pump, Inc. completed the required work and all punch list items. The project has received final inspection and acceptance of construction is recommended.

BACKGROUND:

DRWF Well 1 was constructed in 1979 with mild steel casing and louvers. Well 1 was successfully rehabilitated by brushing / bailing, airburst, chemical and mechanical development, and pumping development. As a result of the rehabilitation, well production increased from 2,250 gallons per minute (gpm) to 2,500 gpm.

DRWF Well 11 was constructed in 1986 with mild steel casing and wire-wrapped, stainless steel Johnson screens. Rehabilitation steps followed the same protocol as Well 1. Well No. 11's production had slightly dropped over time but had significant biofouling in the casing. As a result of the rehabilitation, well production increased from 2,500 gpm to 2,700 gpm.

DRWF Well 13 was constructed in 1984 with copper bearing steel casing material and wire wrapped, stainless steel Johnson screens. Well 13 has operated sporadically over the past several years due to water quality issues. Rehabilitation steps were similar to the other two wells, with the exception of the addition of two casing patches to cover holes found in the casing. Well production increased from 2,500 gpm to 2,700 gpm.

Richard C. Slade & Associates completed the design in September 2020. Best Drilling and Pump, Inc. was awarded the construction contract in November 2020 and completed construction of all improvements in May 2022. Additional time was required to complete the overall rehabilitation process due to patching of the casing at Well 13, performance of a specialized packer test at Well 13, and a specialized pumping and dynamic video test conducted at the DATS supply Wells C8 and C9. A summary of construction change orders is provided as Exhibit "A".

Project Title:	Rehabilitation of DRWF Wells 1, 11, and 13
Project Nos.:	07092, 07088, and 10098
Design Engineer:	Richard C. Slade & Associates, LLC
Construction Management:	IRWD Staff
Contractor:	Best Drilling and Pump, Inc.
Original Contract Cost:	\$1,698,100.00

Final Contract Cost:	\$1,453,003.50
Original Contract Days:	180
Final Contract Days:	519
Final Change Order Approved:	May 26, 2022

FISCAL IMPACTS:

Projects 07092, 07088, and 10098 are included in the FY 2021-22 Capital Budget. The existing budgets are sufficient to fund the final payment for the project.

ENVIRONMENTAL COMPLIANCE:

This project is exempt from the California Environmental Quality Act (CEQA) as authorized under the California Code of Regulations, Title 14, Chapter 3, Section 15301 which provides exemption for minor alterations of existing public or private structures, facilities, mechanical equipment, or topographical features, involving negligible or no expansion of use beyond that existing at the time of the lead agency's determination. A Notice of Exemption (NOE) was filed with the Orange County Clerk Recorder on August 31, 2020.

COMMITTEE STATUS:

This item was not reviewed by a Committee.

RECOMMENDATION:

THAT THE BOARD ACCEPT CONSTRUCTION OF THE REHABILITATION OF DYER ROAD WELLFIELD WELLS 1, 11, AND 13, AUTHORIZE THE GENERAL MANAGER TO FILE A NOTICE OF COMPLETION, AND AUTHORIZE THE PAYMENT OF RETENTION 35 DAYS AFTER RECORDING THE NOTICE OF COMPLETION FOR PROJECTS 07092, 07088, AND 10098.

LIST OF EXHIBITS:

Exhibit "A" – Construction Change Order Summary

EXHIBIT "A"

Rehabilitation of DRWF Well Nos. 1, 11, and 13

PR Nos. 07092, 07088, and 10098

Construction Change Order Summary

Contractor: Best Drilling and Pump, Inc. (Best)

Design Engineer: Richard C. Slade Associates, LLC

				Contract Amount						Contract Days				Original Completion Date:
				Original Contract Amount: \$1,698,100.00						Original Days: 180				5/23/2021
Change Order	Description	Category	Initiated by (IRWD or Best)	Change Order Line Item Amount	Change Order Amount	Previous Change Orders	Cumulative Total of Change Orders	% of Original Contract Amount	Revised Contract Amount	Change Order Days	Previous Change Orders	Cum. Total C.O. days	Revised Total Contract Days	Revised Completion Date
1	Approved by Exe. Director of Technical Services Approved on April 13, 2021 Intall 20 foot patch at DRWF Well No. 13.	B	IRWD	\$ 25,645.00	\$25,645.00	\$0.00	\$25,645.00	1.51%	\$1,723,745.00	15	0	15	195	6/7/2021
2	Approved by Exe. Director of Technical Services Approved on September 21, 2021 Additional time for Covid-19 related issues, manufacturer and supply delays in material procurement, factory and distribution system shutdowns due to employee illnesses and manpower shortages.	B	Best	\$ -	\$0.00	\$25,645.00	\$25,645.00	1.51%	\$1,723,745.00	144	15	159	339	10/29/2021
3	Approved by Exe. Director of Technical Services Approved on December 3, 2021 Additional 77.5 hours of pumping development with packer at Well No. 13 and equipment rental and operator time to perform EMT-24 survey at Well Nos. C8 and C9.	A	IRWD	\$ 40,715.00	\$40,715.00	\$25,645.00	\$66,360.00	3.91%	\$1,764,460.00	94	159	253	433	1/31/2022
4	Approved by Exe. Director of Technical Services Approved on February 16, 2022 Pumping and dynamic video to determine source of sanding at Well No. C8.	A	IRWD	\$ 51,550.00	\$51,550.00	\$66,360.00	\$117,910.00	6.94%	\$1,816,010.00	43	253	296	476	3/15/2022
5	Approved by Exe. Director of Technical Services Approved on May 26, 2022 Reduction in quantity of unit price bid items.	A	IRWD	\$ (363,006.50)	\$(363,006.50)	\$117,910.00	-\$245,096.50	-14.43%	\$1,453,003.50	43	296	339	519	4/27/2022
Total Change Orders				\$ (245,096.50)										

Category	Total Amount	% of Original
A - Owner Directed Change	\$ (270,741.50)	-15.94%
B - Differing/Unknown Condition	\$ 25,645.00	1.51%
C - External Agency, Regulatory, and/or Permit Required Change	\$ -	0.00%
D - Design Oversight	\$ -	0.00%
TOTAL (A + B + C + D)	\$ (245,096.50)	-14.43%

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June 13, 2022

Prepared by: D. Pardee / C. Smithson

Submitted by: C. Clary

Approved by: Paul A. Cook



ACTION CALENDAR

IRWD GUIDING PRINCIPLES SCORECARD

SUMMARY:

Staff has provided operational performance measures to the Board on a quarterly basis since February 2015 and now recommends a refresh of the current measures. The new Guiding Principles Scorecard is intended to reflect the critical performance measures that gauge the District's key business objectives and reflect the Board-adopted Guiding Principles. At the Board meeting, staff will present the proposed Guiding Principles Scorecard for the Board's review and comment.

BACKGROUND:

Staff has provided operational performance measures to the Board on a quarterly basis since February 2015. Staff has determined a need to refresh the current measures and has developed an updated approach to performance measures that is titled the "Guiding Principles Scorecard." This new summary, which is provided as Exhibit "A", is based on the four Board-adopted Guiding Principles which relate to: 1) Customer Service, 2) Resource Management, 3) Employee Development, and 4) Community Leadership. Within these four categories, staff has populated a number of operating performance, financial, customer and other key measures that provide an overview of the ongoing operations of IRWD.

At the Board meeting, staff will use a PowerPoint presentation, provided as Exhibit "B", to describe how the Scorecard was developed and to solicit input from the Board.

FISCAL IMPACTS:

Not applicable.

ENVIRONMENTAL COMPLIANCE:

Not applicable.

COMMITTEE STATUS:

This item was not reviewed by a Committee.

RECOMMENDATION:

THAT THE BOARD PROVIDE FEEDBACK ON THE PROPOSED IRWD GUIDING PRINCIPLES SCORECARD.

Action Calendar: IRWD Guiding Principles Scorecard

June 13, 2022

Page 2

LIST OF EXHIBITS:

Exhibit “A” – Proposed Guiding Principles Scorecard

Exhibit “B” – Guiding Principles Scorecard PowerPoint Presentation

Exhibit "A"
IRVINE RANCH WATER DISTRICT
Guiding Principles Scorecard
 FYTD as of December 31, 2021

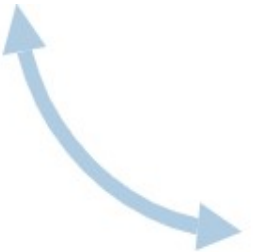
Customer Service		
We are dedicated to delivering superior service to our customers.		
Measure	Last Year	This Year
Customer Satisfaction	%	%
Electronic Payments Received	%	%
Customer Contacts	Number	Number
Delinquent Customers on Payment Arrangements	Number	Number
Residential Customers within Water Budget	%	%
All Customers within Water Budget	%	%
Occupancy Certificates	Number	Number
Verified Odor Complaints	Number	Number
Verified Water Quality Complaints	Number	Number

Employee Development		
We are committed to recruiting and retaining top quality employees and to providing a workplace environment, training, and a recognition and reward system that enhances employee performance and satisfaction.		
Measure	Last Year	This Year
Employees enrolled in 457 Retirement Plan	%	%
Employee Retention	%	%
OSHA Days Away, Restricted, or Transferred (DART)	Number	Number
Cross Training Opportunities	Number	Number
Interns Employed	Number	Number
Safety Training Hours Delivered vs. Goal	%	%
Employees Receiving Recognition Awards	Number	Number



Community Leadership		
We will share our resources with the community through education, policy leadership and employee involvement.		
Measure	Last Year	This Year
Water Efficiency Web Page Hits	Number	Number
Billing Web Page hits	Number	Number
Social Media Impressions	Number	Number
Outreach Events	Number	Number
Participants in Water Education Programs	Number	Number
Industry Awards and Honors	Number	Number
State Legislative & Regulatory Hours Spent	Number	Number

Vision
To achieve greater customer and employee satisfaction, increased reliability and resource conservation, and excellent external relationships with suppliers and others.

Resource Management		
We are dedicated to providing, conserving, and maximizing the efficient use and reuse of water and renewable resources to the benefit of our customers and to enhance the environment.		
Measure	Last Year	This Year
Planned Maintenance Work Completed	%	%
Sales potable AF	Number	Number
Sales non potable AF	Number	Number
Recycled Water Produced (AF)	Number	Number
Irvine Lake Storage (AF)	Number	Number
Recycled Water Storage (AF)	Number	Number
Sewer Treatment cost per MG	Number	Number
Capital Spending vs Budget	%	%
AQMD Incidents	Number	Number
Plant Incidents -Other regulatory	Number	Number
Sewer Spills	Number	Number



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**Irvine Ranch
Water District**

**IRWD GUIDING
PRINCIPLES SCORECARD**



BOARD MEETING
JUNE 13, 2022

1

1

AGENDA



- IRWD's Vision and Guiding Principles
- Previously-Used Operational Performance Measures
- New Guiding Principles Scorecard
- Next Steps
- Discussion



2

2

IRWD's Vision Statement and Guiding Principles

3



3

Vision

The Irvine Ranch Water District's vision is to achieve greater customer and employee satisfaction, increased reliability and resource conservation, and excellent external relationships with suppliers and others.

Guiding Principles

Customer Service	We are dedicated to delivering superior service to our customers.
Employee Development	We are committed to recruiting and retaining top quality employees and to providing a workplace environment, training, and a recognition and reward system that enhances employee performance and satisfaction.
Resource Management	We are dedicated to providing, conserving, and maximizing the efficient use and reuse of water and renewable resources to the benefit of our customers and to enhance the environment.
Community Leadership	We will share our resources with the community through education, policy leadership and employee involvement.

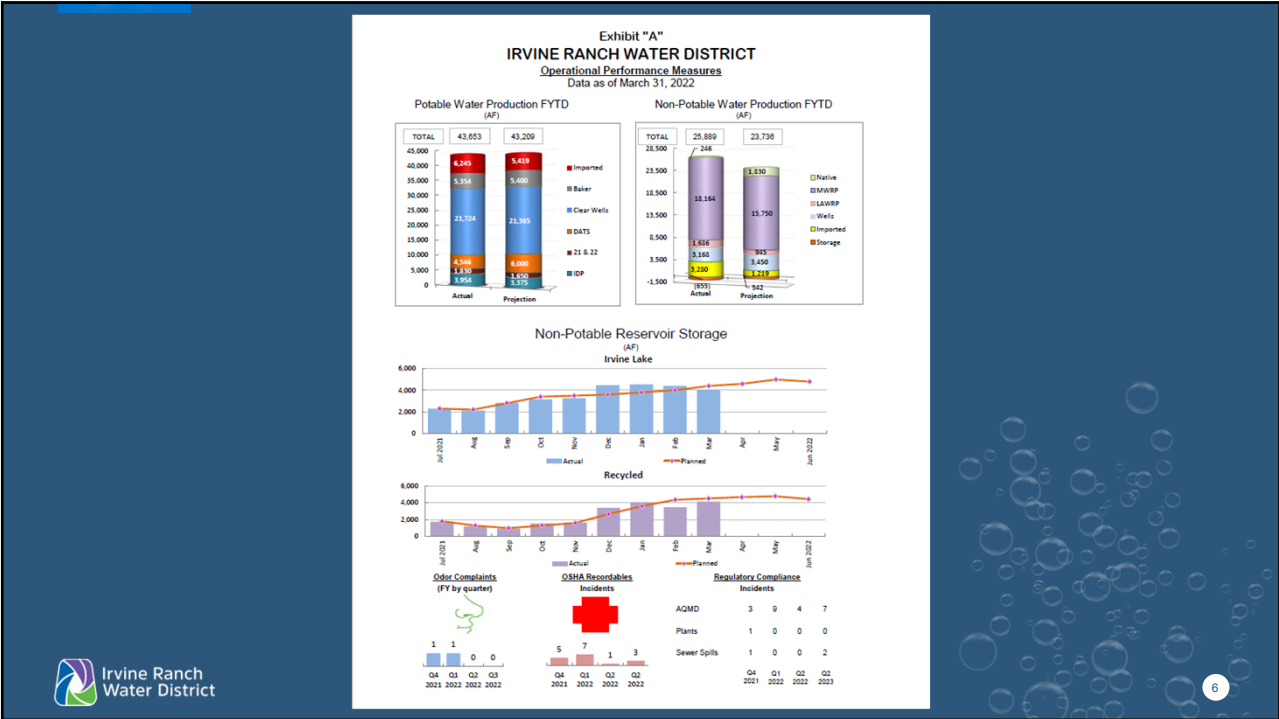
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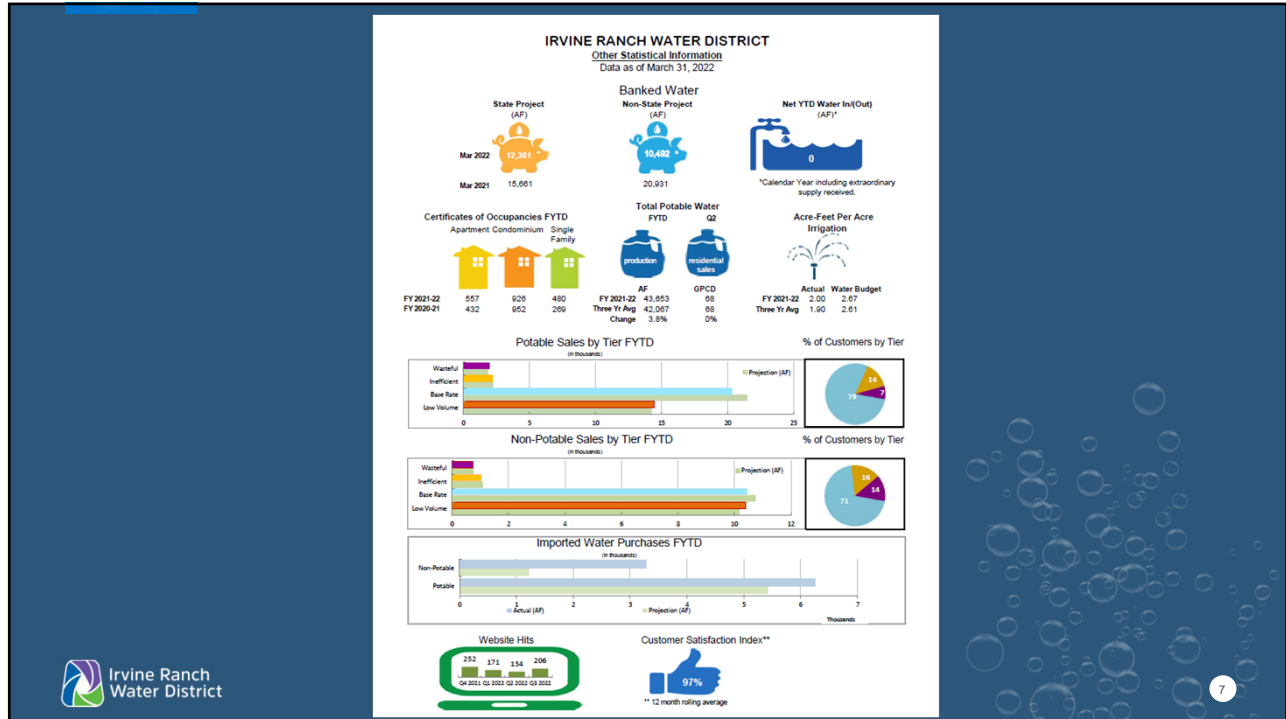
Previously-Used Operating Performance Measures



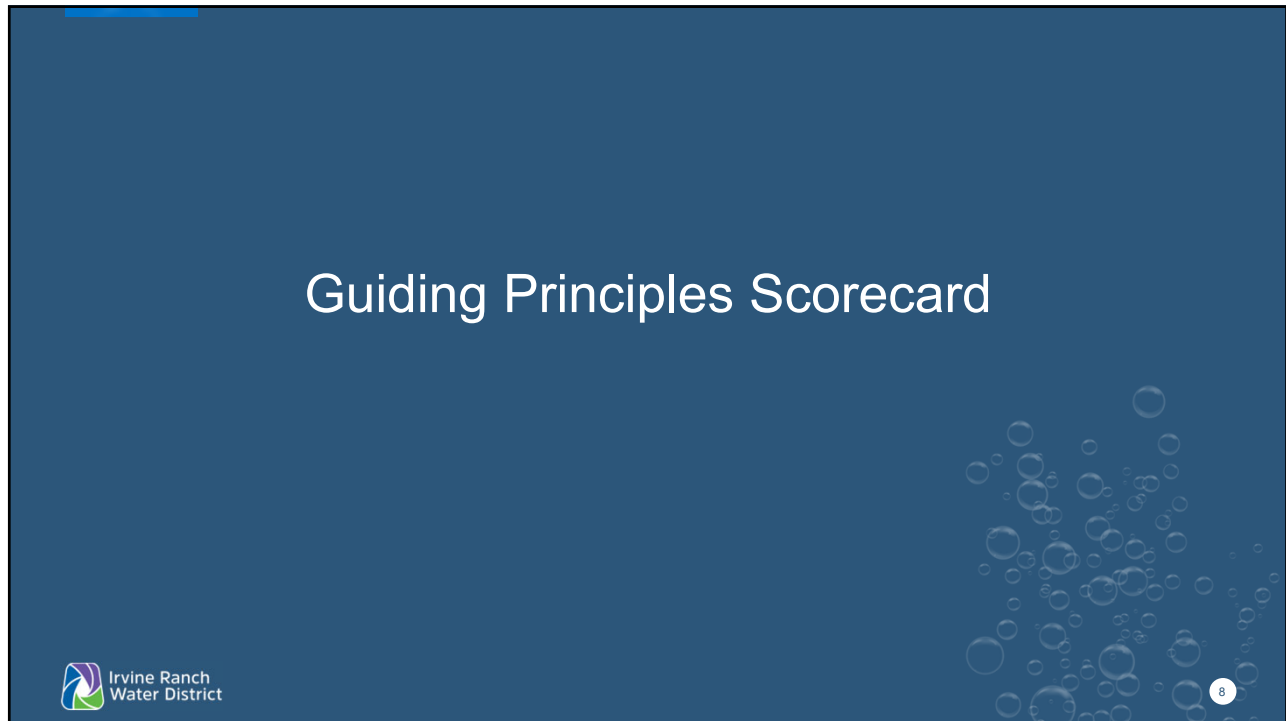
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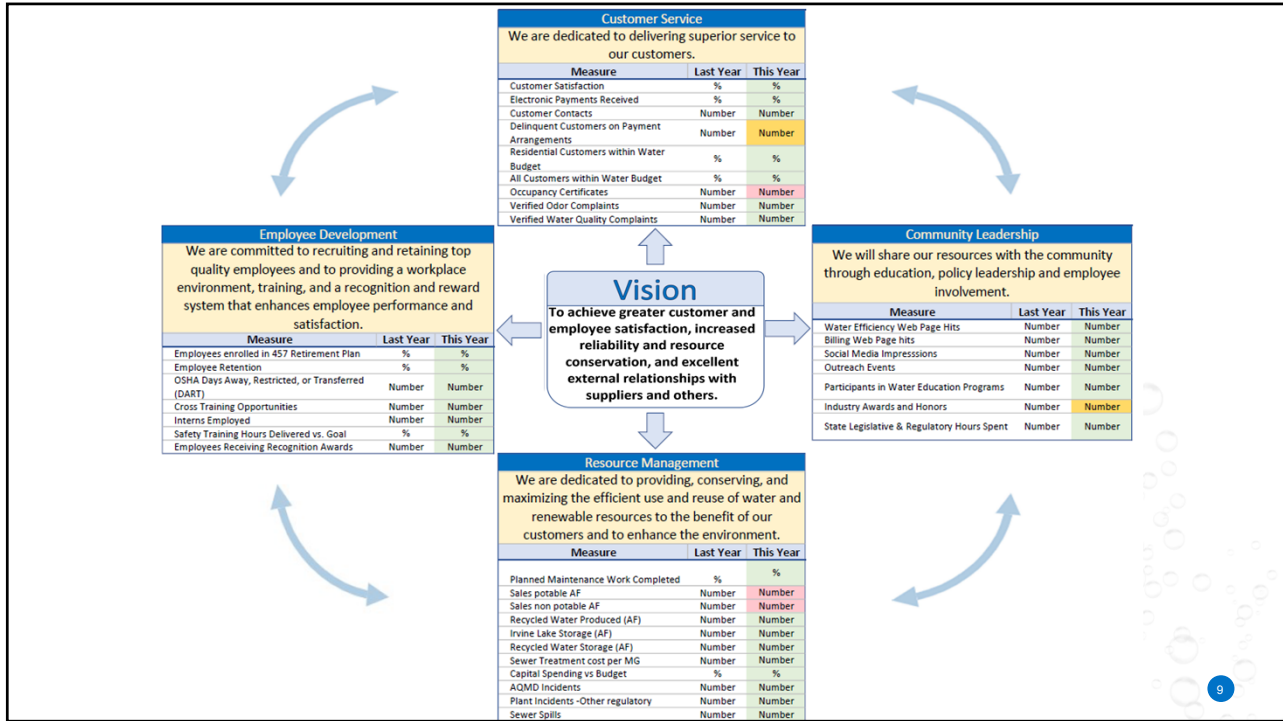
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NEXT STEPS

- 1) Incorporate Board comments / input into final Scorecard.
- 2) Populate Scorecard with current data.
- 3) Submit to Board on a quarterly basis starting in July 2022.

IRVINE RANCH WATER DISTRICT
Guiding Principles Scorecard
FYTD as of December 31, 2021

10

Discussion / Input

Irvine Ranch
Water District

11

11

June 13, 2022

Prepared by: M. Lindsay / K. Welch

Submitted by: F. Sanchez / P. Weghorst

Approved by: Paul A. Cook *PAC*

ACTION CALENDAR

2022 ANNUAL WATER SUPPLY AND DEMAND ASSESSMENT

SUMMARY:

Staff has prepared IRWD's 2022 Annual Water Supply and Demand Assessment (AWSDA) consistent with the requirements of Section 10632 of the California Water Code. This section of the Water Code requires that every water supplier with over 3,000 urban connections perform and submit an AWSDA annually to the California Department of Water Resources (DWR), beginning July 1, 2022. IRWD's 2022 AWSDA shows there is a water supply surplus and supplies are reliable. Staff recommends the Board approve the 2022 Annual Water Supply and Demand Assessment for submittal to DWR by the July 1, 2022, deadline.

BACKGROUND:

In 2018, following the 2012-2016 drought, the State legislature adopted the "Making Conservation a California Way of Life" legislation. In addition to establishing new water efficiency standards, the legislation included substantial provisions to strengthen local water shortage planning. It included new requirements for Water Shortage Contingency Plans, five-year drought assessments, and preparation and submittal of AWSDAs to DWR beginning in July 2022.

In 2021, the IRWD Board adopted the District's 2020 Water Shortage Contingency Plan (WSCP) that incorporated written procedures for preparation of IRWD's AWSDA. These procedures are based on IRWD's existing methods for its annual water budget development process and are consistent with DWR's guidelines. IRWD prepares each AWSDA on a fiscal year basis.

Overview of IRWD's Annual Water Supply Demand Assessment:

IRWD's 2022 AWSDA is an assessment of the near-term outlook for supplies, demands and identification of any expected water shortage that may prompt response actions in the current year. Available supplies are assessed through staff coordination with Orange County Water District and regional wholesalers including Municipal Water District of Orange County and the Metropolitan Water District. MWDOC's 2022 AWSDA shows that there is no imported water shortage affecting IRWD.

Key Criteria and Assumptions for IRWD's 2022 AWSDA:

The 2022 IRWD AWSDA, provided as Exhibit "A", is comprised of five DWR-required tables. Key criteria and assumptions of this AWSDA include the following:

- The AWSDA is based on IRWD's annual water budget and therefore considers the previous year's demands and projected future demands;

- The AWSDA is based on a projected single dry year of unconstrained demands, which are defined as demands absent any water supply or demand restrictions;
- Projected water supplies for the AWSDA include IRWD's supplemental water banking supplies that would be available for use on an emergency basis, if needed; and
- IRWD can access additional imported supplies in Southern California and has the potential to pump additional groundwater, if needed.

Results of IRWD's 2022 AWSDA:

As shown in the 2022 AWSDA, IRWD has no projected water shortage. IRWD has an overall surplus of 25% for potable supplies and a 2% surplus for non-potable supplies, with no shortage gap. The AWSDA demonstrates that the District's supplies are reliable and are in surplus. Staff recommends the Board approve the 2022 Annual Water Supply and Demand Assessment for submittal to DWR prior to the July 1, 2022, deadline.

Executive Order N-7-22:

On March 28, 2022, in response to the worsening statewide drought, Governor Newsom issued Executive Order (EO) N-7-22 directing water suppliers to achieve a voluntary demand reduction of up to 20%. The EO also directed water suppliers to submit a preliminary AWSDA report to DWR by June 1, 2022. In response to the order, staff prepared and submitted IRWD's preliminary 2022 AWSDA to DWR by the required deadline.

No changes were made from the preliminary to the final AWSDA. Notes were included in Table 5 of the AWSDA indicating that although IRWD does not have a projected shortage, it has implemented the locally appropriate Level 2 water shortage actions in its WSCP to achieve a demand reduction of up to 20% as required by EO N-7-22. Since November 2021, and prior to EO N-7-22, IRWD has been implementing voluntary Level 2 response actions to address drought conditions. IRWD's voluntary response actions include expanding its public information campaign, discouraging the filling of pools and water features, expanding outdoor programs and workshops, targeting outreach to over-budget customers, and expanding rebates and financial incentives for increased conservation.

FISCAL IMPACTS:

None.

ENVIRONMENTAL COMPLIANCE:

None.

COMMITTEE STATUS:

This item was reviewed by the Water Resources Policy and Communications Committee on June 2, 2022.

RECOMMENDATION:

THAT THE BOARD APPROVE THE 2022 ANNUAL WATER SUPPLY AND DEMAND ASSESSMENT FOR SUBMITTAL TO THE DEPARTMENT OF WATER RESOURCES PRIOR TO THE JULY 1, 2022, DEADLINE.

LIST OF EXHIBITS:

Exhibit "A" – 2022 Annual Water Supply and Demand Assessment

Note: This page is intentionally left blank.

Exhibit "A"

															= From prior tables
															= Auto calculated
Table 2: Water Demands¹															
Use Type			Start Year:			2022			Volumetric Unit Used²:				AF		
Drop-down list May select each use multiple times These are the only Use Types that will be recognized by the WUEdata online submittal tool (Add additional rows as needed)	Additional Description (as needed)	Level of Treatment for Non-Potable Supplies Drop-down list	Projected Water Demands - Volume ³												
			Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total by Water Demand Type
Demands Served by Potable Supplies															
Other Potable	Residential		3,269	3,276	3,114	2,911	2,915	2,591	2,591	2,394	2,277	2,455	2,835	2,864	33,492
Commercial	Commercial		753	812	889	683	671	561	613	586	579	540	603	680	7,970
Industrial	Industrial		426	451	419	425	444	402	347	432	364	358	415	424	4,907
Other Potable	Public Authority		104	193	134	163	157	148	139	158	149	133	113	217	1,808
Landscape	Landscape		610	638	581	479	442	250	202	198	174	234	388	444	4,640
Agricultural irrigation	Agriculture		18	18	23	7	6	3	4	3	4	9	14	15	124
Other Potable	Construction		25	35	41	33	32	18	22	16	17	21	30	26	316
Other Potable	Other Potable		3	3	3	3	7	6	2	2	2	2	2	3	38
															0
															0
Total by Month (Potable)			5,208	5,426	5,204	4,704	4,674	3,979	3,920	3,789	3,566	3,752	4,400	4,673	53,295
Demands Served by Non-Potable Supplies															
Commercial			51	92	63	55	50	35	38	36	35	37	41	44	577
Landscape			3,378	3,635	3,539	2,909	2,479	1,393	982	946	954	1,129	2,446	2,735	26,525
Agricultural irrigation			331	302	437	357	366	165	94	98	239	191	261	294	3,135
Industrial			4	4	4	4	3	2	3	3	4	3	4	2	40
Other Nonpotable			35	24	33	34	31	15	35	19	56	31	30	43	386
Total by Month (Non-Potable)			3,799	4,057	4,076	3,359	2,929	1,610	1,152	1,102	1,288	1,391	2,782	3,118	30,663
Notes: List considered factors impacting demands															
¹ Projections are based on best available data at time of submitting the report and actual demand volumes could be different due to many factors. ² Units of measure (AF, CCF, MG) must remain consistent. ³ When opting to provide other than monthly volumes (bi-monthly, quarterly, or annual), please see directions on entering data for Projected Water Demand in the Table Instructions.															

= From prior tables

= Auto calculated

Table 3: Water Supplies¹

Water Supply	Start Year:	Volumetric Unit Used ² :												AF	Water Quality	Total Right or Safe Yield* (optional)
Drop-down List May use each category multiple times. These are the only water supply categories that will be recognized by the WUEdata online submittal tool (Add additional rows as needed)	Additional Detail on Water Supply	Projected Water Supplies - Volume ³														
		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total by Water Supply Type		
Potable Supplies																
Groundwater (not desal.)	DRWF	3,000	3,000	3,000	2,643	2,643	1,443	1,843	2,143	1,643	1,643	2,500	2,500	28,001		
Groundwater (not desal.)														0		
Desalinated Groundwater	(net) Wells 21	156	156	156	156	156	156	163	149	156	156	156	156	1,872		
Groundwater (not desal.)	(net) DATS	653	653	653	653	653	653	669	637	653	653	653	653	7,836		
Desalinated Groundwater	(net) IDP	319	319	319	319	319	319	319	319	319	319	319	319	3,828		
Purchased/Imported Water	(net) Baker	588	588	588	588	588	588	588	588	588	588	588	588	7,056		
Purchased/Imported Water	MWDOC	736	959	737	569	539	1,015	513	120	342	556	391	674	7,151		
Supply from Storage	Emergency												11,000	11,000		
														0		
														0		
Total by Month (Potable)		5,452	5,675	5,453	4,928	4,898	4,174	4,095	3,956	3,701	3,915	4,607	15,890	66,744		0
Non-Potable Supplies																
Recycled Water	MWRP &	2,826	2,933	2,963	2,583	2,503	1,206	747	695	837	955	2,294	2,348	22,890		
Desalinated Groundwater	(net) ETGR	331	331	331	331	331	331	331	331	331	331	331	334	3,975		
Purchased/Imported Water	MWDOC	320	480	470	191	32	66	48	57	121	94	164	436	2,479		
Surface water (not desal.)	Native	396	393	392	319	121	39	48	40	23	39	50	65	1,925		
														0		
Total by Month (Non-Potable)		3,873	4,137	4,156	3,424	2,987	1,642	1,174	1,123	1,312	1,419	2,839	3,183	31,269		0
Notes: Supply from Storage/Emergency supplies is only be used in the event of an actual shortage, and there is no projected shortage. It is shown as an annual total. If needed, additional dry-year imported supplies are via the Municipal Water District of Orange County and the Metropolitan Water District (MWD). Information is based on coordination with MWD.																
¹ Projections are based on best available data at time of submitting the report and actual supply volumes could be different due to many factors.																
² Units of measure (AF, CCF, MG) must remain consistent.																
³ When opting to provide other than monthly volumes (bi-monthly, quarterly, or annual), please see directions on entering data for Projected Water Supplies in the Table Instructions.																

													= Auto calculated								
													= From prior tables								
													= For manual input								
Table 4(P): Potable Water Shortage Assessment¹													Start Year: 2022		Volumetric Unit Used²:					AF	
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun³	Total								
Anticipated Unconstrained Demand	5,208	5,426	5,204	4,704	4,674	3,979	3,920	3,789	3,566	3,752	4,400	4,673	53,295								
Anticipated Total Water Supply	5,452	5,675	5,453	4,928	4,898	4,174	4,095	3,956	3,701	3,915	4,607	15,890	66,744								
Surplus/Shortage w/o WSCP Action	244	249	249	224	224	195	175	167	135	163	207	11,217	13,449								
% Surplus/Shortage w/o WSCP Action	5%	5%	5%	5%	5%	5%	4%	4%	4%	4%	5%	240%	25%								
State Standard Shortage Level	0	0	0	0	0	0	0	0	0	0	0	0	0								
Planned WSCP Actions																					
Benefit from WSCP: Supply Augmentation														0.0							
Benefit from WSCP: Demand Reduction														0.0							
Revised Surplus/Shortage with WSCP	244	249	249	224	224	195	175	167	135	163	207	11,217	13,449								
% Revised Surplus/Shortage with WSCP	5%	5%	5%	5%	5%	5%	4%	4%	4%	4%	5%	240%	25%								
¹ Assessments are based on best available data at time of submitting the report and actual volumes could be different due to many factors. ² Units of measure (AF, CCF, MG) must remain consistent. ³ When optional monthly volumes aren't provided, verify Tables 2 and 3 use the same columns for data entry and are reflected properly in Table 4 and make sure to use those same columns to enter the benefits from Planned WSCP Actions. Please see directions on the shortage balancing exercise in the Table Instructions. If a shortage is projected, the supplier is highly recommended to perform a monthly analysis to more accurately identify the time of shortage.																					


Table 5: Planned Water Shortage Response Actions				July 1, 2022	to June 30, 2023	
Anticipated Shortage Level Drop-down List of State Standard Levels (1 - 6) and Level 0 (No Shortage)	ACTIONS: Demand Reduction, Supply Augmentation, and Other Actions. (Drop-down List) These are the only categories that will be accepted by the WUEdata online submittal tool. Select those that apply.	Is action already being implemented? (Y/N)	How much is action going to reduce the shortage gap?		When is shortage response action anticipated to be implemented?	
			Enter Amount	(Drop-down List) Select % or Volume Unit	Start Month	End Month
<i>Add additional rows as needed</i>						
0 (No Shortage)	Other Actions (describe in Notes at bottom of Table)	Yes	0-20%	%		
0 (No Shortage)	Expand Public Information Campaign	Yes	0-20%	%		
<p>NOTES: Per E.O. N-7-22: IRWD is implementing Level 2 response actions even though there is no identified shortage. Water waste prohibitions are permanently in place, regardless of drought. IRWD has been implementing actions consistent with the Governor's Executive Orders to achieve a reduction of up to 20% since September 2021. Other Actions include but are not limited to - (1) Discourage filling of fountains, pools, and water features and other discretionary uses. (2) Expand outdoor education programs and workshops (3) Targeted outreach to over-budget customers (4) Expanded rebate and financial incentives.</p>						

Note: This page is intentionally left blank.

June 13, 2022

Prepared by: A. McNulty

Submitted by: F. Sanchez / P. Weghorst

Approved by: Paul A. Cook 

ACTION CALENDAR

IRWD CUSTOMER ENGAGEMENT AND ANALYTICS PROGRAM

SUMMARY:

IRWD has provided its customers with a Customer Engagement and Analytics Program for the past 10 years. A primary purpose of the program has been to provide IRWD customers with personalized water use reports in addition to, and separate from, their monthly water bills. The current program also provides staff with data useful for analyses. The current program has been implemented by IRWD in partnership with its software provider WaterSmart. IRWD's contract with WaterSmart to provide software and services expires on June 30, 2022.

To continue the Customer Engagement and Analytics Program, staff solicited proposals from firms that could provide the requested software and services. After completing a thorough evaluation of the proposals received, staff determined that WaterSmart is the most qualified firm to provide continued implementation of and enhancements to this program. Staff recommends the Board authorize the General Manager to execute a Professional Services Agreement with WaterSmart to provide Customer Engagement and Analytics Program software and services for Fiscal Year (FY) 2022-23 in the amount of \$191,101, with an option to extend the agreement annually for up to five years with a 3% annual escalator for a total potential cost of \$1,014,600 over the five years.

BACKGROUND:

In 2012, IRWD first tested the efficacy of providing its customers with additional information regarding their water use, separate from what was provided on their monthly bills, through a pilot program. The information was presented to customers that was visually appealing and easy to understand, coupled with social norming messages about how efficiently they use water. Based on the success of the pilot program, IRWD has continued to provide customers these benefits through a Customer Engagement Program and Analytics Program.

IRWD's existing Customer Engagement and Analytics Program, implemented by WaterSmart, includes a web-based portal for customers and for IRWD that displays historical water use information, shows customer attributes such as number of people in a home, and provides two-way communication capability between IRWD's water efficiency staff and customers. Use of the program over the past 10 years has:

- Improved customers' water use efficiency through clear and easy-to-understand charts and data;
- Improved customer satisfaction with an easy-to-use customer portal;
- Increased use of customer self-service through a program that can easily link customers to and from IRWD's existing online Paymentus bill pay application; and

- Enhanced water efficiency program marketing capabilities and customer communication about water use.

The current Customer Engagement and Analytical Program services contract with WaterSmart expires on June 30, 2022. To continue providing Customer Engagement and Analytical Program services, staff conducted the solicitation and evaluation process described below.

Proposal Solicitation and Evaluation Process:

In March 2022, staff issued a request for proposal (RFP) to 12 companies to provide Customer Engagement and Analytical Program services for the next five years. The RFP included detailed program requirements and the following deliverables:

- A customer-facing, web-based portal with single user login capabilities for accessing multiple accounts and that integrates with IRWD's Paymentus portal;
- The ability for IRWD to send automatic and manual alerts and notifications via email and text messages;
- An IRWD-facing, web-based analytics dashboard including reports and customer communication tools;
- Reports designed to enable IRWD to monitor customer usage and track program performance;
- A staff training plan; and
- A program management plan.

In response to the RFP, proposals were received from five firms: AquaTrax, Open Channel Systems, Smart Energy Water, Util360, and WaterSmart. Staff completed a thorough evaluation of the written proposals, conducted interviews with each of the five companies, checked references, and evaluated cybersecurity measures. Staff's evaluation is summarized on the Proposal Evaluation Matrix, provided as Exhibit "A". Based on this evaluation, staff recommends the selection of WaterSmart to provide program software and services for FY 2022-23, with annual options to extend the contract for up to five years. WaterSmart's scope of work, cost estimate, and schedule are provided as Exhibit "B".

Overview of WaterSmart's Proposed Software and Services:

WaterSmart's software and services for IRWD's Customer Engagement and Analytical Program will provide IRWD with a customer portal, data analytics, and powerful customer communication tools. These tools provide IRWD with the ability to monitor and evaluate program marketing effectiveness and customer engagement with the portal as well as tailor other outreach messaging. A detailed description of the programs' key elements and other benefits is provided below.

Residential Customer Portal:

IRWD provides water service to approximately 106,560 single-family residential customers. The implementation of the District's budget-based rate structure is very effective at communicating to residential customers large occurrences of water waste, but smaller leaks and excessive use may go unnoticed. The WaterSmart program offers the ability to communicate with customers about smaller leaks and provides the following benefits for residential customers:

- A web-based portal;
- Customized monthly water use reports;
- Targeted water efficiency program marketing tools; and
- Unique alerts based on customer attributes.

The WaterSmart program will provide IRWD the ability to continue sending customers leak alerts based on customized usage thresholds as well as alerts in advance of upcoming rain events. These types of event specific communication create useful, actionable, and appreciated information for customers without excessive notifications or information overload that tends to be ignored.

Commercial and Large Landscape Customer Portal:

IRWD provides water service to over 16,900 Commercial, Industrial, and Institutional (CII), multi-family, and dedicated irrigation accounts. Collectively, these customers consume 46% of the potable supply and 100% of the recycled water supply. The CII and large landscape customer portal provide customers in this sector with access to water use information for the account(s) each customer manages, which enables customers to respond quickly to high or wasteful usage.

IRWD-Facing Portal:

WaterSmart's IRWD-facing portal meets the District's data needs, displaying information in a manner that is easy to understand and analyze. Statistical reports contain useful feedback on the program's effectiveness at engaging customers and motivating them to take water-saving action. Reports can be easily downloaded as needed for other purposes. The IRWD-facing portal is also compatible with potential (future) Automated Metering Infrastructure (AMI) pilot programs.

Additional Benefits:

The WaterSmart product was designed with input from water utilities and builds on features developed for IRWD and other water utilities. Since WaterSmart is providing IRWD's existing Customer Engagement and Analytics Program, there will be no interruption or changes to the experiences of IRWD's customers. Also, the program is integrated with IRWD's Paymentus bill pay system. Additionally, WaterSmart's software systems meet IRWD's requirements for protecting customer data.

FISCAL IMPACTS:

WaterSmart's proposed cost to implement its software program is \$140,101 per year plus a per unit cost of \$0.85 per printed report, including postage. Providing for 5,000 monthly reports results in a total cost of \$191,101 for FY 2022-23. Funds are included in the FY 2022-23 IRWD Operating Budget. If all extension options are exercised and the 3% escalator is applied, the total amount of this contract after a total of five years would be \$1,014,600.

ENVIRONMENTAL COMPLIANCE:

Not applicable.

COMMITTEE STATUS:

This item was reviewed by the Water Resources Policy and Communications Committee on June 2, 2022.

RECOMMENDATION:

THAT THE BOARD AUTHORIZE THE GENERAL MANAGER TO EXECUTE A PROFESSIONAL SERVICES AGREEMENT WITH WATERSMART TO PROVIDE CUSTOMER ENGAGEMENT AND ANALYTICS PROGRAM SOFTWARE AND SERVICES FOR FISCAL YEAR 2022-23 IN THE AMOUNT OF \$191,101, WITH AN OPTION TO EXTEND THIS AGREEMENT ANNUALLY FOR UP TO FIVE YEARS WITH A 3% ANNUAL ESCALATOR FOR A TOTAL POTENTIAL COST OF \$1,014,600 OVER THE FIVE YEARS.

LIST OF EXHIBITS:

Exhibit "A" – Proposal Evaluation Matrix

Exhibit "B" – WaterSmart Scope of Work

Exhibit "A"

CONSULTANT EVALUATION MATRIX

Customer Engagement and Analytics Program

Item	Description	Weights	Open Channel	WaterSmart (VertexOne)	Smart Energy Water	Util360	AquaTrax
A	<u>TECHNICAL APPROACH</u>	60%					
1	Adherence to RFP Requirements	10%	4	1	3	2	5 Did not meet
2	Understanding of required services and project details	25%	5	1	2	3	4
3	Approach and Methodology (Tasks 1 - 5)	45%	5	4	3	2	1
4	Schedule	20%	5	1	3	4	2
	<u>Weighted Score (Technical Approach)</u>		4.90	2.35	2.75	2.65	2.35
B	<u>QUALIFICATIONS AND EXPERIENCE</u>	40%					
1	Project Manager	30%	2 Steve Whitesell	3 Jim Turner	4 Abhinav Kashyap	5 Patrick Johnson	1 Amit Sharma
2	Principal-in-Charge	10%	2 Steve Whitesell	3 Dana H.	4 Kevin Hwang	5 Amanda Guiteirrez	1 Amit Sharma
2	Technical Leads	25%	1 Esteban Quesada Jeremy Steele Marcus Haslam Sam Robilotta/Jason Craig	3 James Z. Lori Black	4 Manoj Singh Atul Someshwar Ranjit Kumar Biswal Alison Brown	2 Bill Shah Anand Sharma Kalvin Hutz Susan Thompson	5 Prof. Vidyanand Choudhary Prachi Sharma Amanda Jones Project Lead Database Lead Application Dev. Lead Mobile Application Dev. UI, Dot Net, Angular Developers
3	Project Team Experience (sub and prime)	25%	5	1	3	2	4
4	Firm's Relevant Experience (sub and prime)	10%	5	1	2	4	3
	<u>Weighted Score (Experience)</u>		2.8	2	4	3	3
	<u>COMBINED WEIGHTED SCORE</u>		4.06	2.33	3.07	2.95	2.59
	Ranking of Consultants		4	1	3	2	Did not meet minimum requirements

CONSULTANT EVALUATION MATRIX

Item	Description	Weights	Open Channel		WaterSmart (VertexOne)		Smart Energy Water		Util360		AquaTrax					
C	SCOPE OF WORK															
TASK		ANNUAL TASK HOURS	TASK COST		ANNUAL TASK HOURS	TASK COST		ANNUAL TASK HOURS	TASK COST		ANNUAL TASK HOURS	TASK COST		ANNUAL TASK HOURS	TASK COST	
			Task Cost (YEAR 1)	Annual Cost		Task Cost (YEAR 1)	Annual Cost		Task Cost (YEAR 1)	Annual Cost		Task Cost (YEAR 1)	Annual Cost		Task Cost (YEAR 1)	Annual Cost
1	Program Design (design & configuration)	1,062	\$ 45,000		141	\$ -	\$ -	960	\$ 39,000		1,200	\$ 13,440	\$ 4,000	685	\$ 45,500	\$ 99,730
2	Program Implementation (test, deploy, stabilize & manage)		\$ 99,000		492	\$ 131,301	\$ 131,301		\$ 4,500	\$ 4,000		1,882				
3	Staff Training		\$ 25,000		136	not specified	not specified		\$ 4,000	\$ 1,800		50	\$ 5,500	\$ 2,000		
4	Program Management			\$ 225,990	144	\$ 8,800	\$ 8,800		\$ 39,000	\$ 29,000		175	\$ 15,000	\$ 2,000		
5	Program Evaluation			\$ 299,790	30	not specified	not specified		\$ 18,000	\$ 13,000		135	\$ 2,500	\$ 7,500		
	Annual Software License			\$ 13,200							\$ 65,000	\$ 44,000			\$ 15,000	
	SUB-TOTAL ENGINEERING SERVICES, FEES (Does Not Include Optional Items)	1,062	\$ 169,000	\$ 538,980	943	\$ 140,101	\$ 140,101	960	\$ 39,000	\$ 118,000	1,200	\$ 143,940	\$ 95,800	2,927	\$ 68,500	\$ 126,230
6	Print Reports (each)			\$ 0.62			\$ 0.85		\$ 1.00			\$ 0.60			\$ 1.25	
	TOTAL ENGINEERING SERVICES, FEE	1,062	\$169,000	\$538,981	943	\$140,101	\$140,101	960	\$39,000	\$118,000	1,200	\$143,940	\$95,801	2,927	\$68,500	\$126,231
	Does not include optional tasks	Avg \$/hr		\$ 507.51			\$149		\$ 122.92			\$80			\$ 43.13	
D	OTHER															
	Miscellaneous Items															
	Multiplier		(numeric value)		(numeric value)		(numeric value)		(numeric value)		(numeric value)		(numeric value)		(numeric value)	
	Conflict of Interest		NO		NO		NO		NO		NO		NO		NO	
	Joint Venture		NO		NO		NO		NO		NO		NO		NO	
	Scope of Work Exclusions		NO		YES		NO		NO		NO		NO		NO	
	Exceptions taken to IRWD Professional Services Agreement		NO		YES		NO		NO		NO		NO		NO	
N	IRWD Third Party Cybersecurity Vendor Questionnaire (Exhibit B)		YES		YES		YES		YES		YES		YES		NO	
	Compatible with Paymentus SSO		YES		YES		YES		YES		YES		YES		YES	
	Insurance (Professional & General Liability)		YES		YES		YES		YES		YES		YES		YES	

EXHIBIT "B"



A WaterSmart Solution Overview

Irvine Ranch Water District Request for Proposals

Professional Services for a Customer Engagement and Analytics Program

Your VertexOne Representatives:

Nick Trowbridge

Head of Revenue Operations

Email: Nick.Trowbridge@VertexOne.net

Jim Turner

Director of Customer Success

Email: Jim.Turner@VertexOne.net



Dear Amy,

Thank you for the opportunity to submit this proposal in response to IRWD's request for the development, implementation, and management of a customer engagement and analytics platform.

WaterSmart Software ("WaterSmart") is proud to have had the opportunity to partner with IRWD for the past decade. We feel honored to be counted among the innovative conservation programs which you provide to help your customers become more water efficient and to help you maintain a safe and reliable supply of water. We are confident that WaterSmart and the menu of solutions we offer can continue to successfully address your needs. The full resources of WaterSmart and our parent company, VertexOne, will be available to IRWD to continue to help you meet your conservation and engagement goals for all your customer accounts and to provide you, internally, with robust analytics tools to measure success and direct your resources to where they can be most effective.

It is WaterSmart's intention to provide you with the best-in-class customer engagement and analytics program at an affordable price to help you meet your objectives as we have since 2012. In that spirit and, due to the current program that is in place and operating smoothly, WaterSmart is not including any implementation costs in the included proposal.

Regarding pricing, WaterSmart has provided multiple options to meet the goals and objectives of IRWD. Should there be requested updates to the options provided, WaterSmart has provided marginal costs to add or reduce volumes to fit IRWD's programmatic and budgetary goals. To reduce cost, WaterSmart provided pricing for email delivery of reports to customers with valid email address and print reports to customers without valid email addresses.

We look forward to continuing to work with you in the future and evolving our solutions together.

Thank you for your time and consideration.

Sincerely,

Nick Trowbridge, Head of Revenue Operations

and

Jim Turner, Director of Customer Success



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1. SCOPE:

A detailed scope of work and the methodology. The description shall comprehensively define and describe the individual tasks for the work effort. This scope of work will be used as a basis for later contract negotiations. The scope of work may be based, but is not limited to, the information contained in Section II of this Request for Proposal. Scope of work may be submitted for all or only one customer sector and must include the following:

WaterSmart Software is a customer engagement and data analytics platform currently implemented at IRWD comprised of the following elements:

- **Utility Analytics Dashboard:** Web-based application with analytics, customer support tools, and outbound notification engine for Utility staff
- **Customer Portal:** Web-based application with current and historical water use insights, alerts, and integrated payments for all utility account owners
- **Customer Welcome Letters and Email and Print Water Reports:** Configurable communications delivered to selected participants
- **Embedded Single Sign-On (SSO) Based Integration:** Integration with Paymentus using the SAML 2.0 or OAUTH2 protocol, allowing account owners to access the two portals with a single set of login credentials

WaterSmart is prepared and capable of meeting all requirements outlined by IRWD in this RFP. The Proposer has developed a fully functional, user-friendly web-based software application that serves utility staff through an online Dashboard, and utility customers through an online Portal. The Utility Dashboard displays water consumption data across a utility's entire service area, for any customer account types the utility wishes to include, with a variety of analytics tools overlaid to enable utility staff to better understand consumption trends. In addition, the Utility Dashboard contains tools to facilitate support of, and communication with, utility customers.

The Customer Portal displays individual water consumption to utility customers, with a variety of charts and self-service functionality to place their water use in context. The Customer Portal also includes the ability to enroll in and receive a variety of notifications – e.g., leak alerts, high use notifications, etc. – and view personalized water-saving tips 24x7x365. Over 200 water utilities across the United States and Canada currently use this customer engagement and data analytics platform, with access provided to a total of over 17 million end-users.

In addition to the web-based application, the Proposer is currently delivering Water Reports to educate water utility customers about their water use. These Reports include comparisons of each household's water use to that of similar households, based on modeled occupancy and yard size. The Reports also

provide personalized recommendations on how to save water with estimated water and money savings based on utility's variable water use rates. Customer Water Use Reports have been used by 65+ utilities over the past 9 years, with a total of 22 million reports sent. These Reports have been proven to generate water savings of 2-5%, based on randomized control trials conducted by the Proposer and third parties.

• **Sample format, design and content of web-based application and functionality in the proposal.**

WaterSmart offers several ways for utilities to modify the look and feel of the platform to make it more familiar to their end customers. The IRWD logo appears on the Customer Portal and on all communications sent to end users. The URL for the Customer Portal can contain the IRWD's name, currently irwd.watersmart.com.

Many utilities choose to redirect customers to the Customer Portal from the utility's website. This option requires the IRWD to set up a redirect on their own, which will redirect users to their **WaterSmart** portal. It is also possible, for an additional fee, to host the platform on the IRWD's own domain, which would allow for a program URL like www.beverlyhills.com/watersmart.

The Portal is highly configurable according to the IRWD's preferences and requirements, including the use of 'Splash' notifications (shown below), links in the 'I Want To' tile of the Customer Portal Home Page, Notifications, and targeted messages. During implementation and throughout the program, the IRWD staff will work with your Customer Success Manager to update this configurable content to best suit IRWD's and your customers' needs. The IRWD has the ability approve or exclude any of the recommendations shown in the Customer Portal and provide WaterSmart with information on available rebates and incentives.

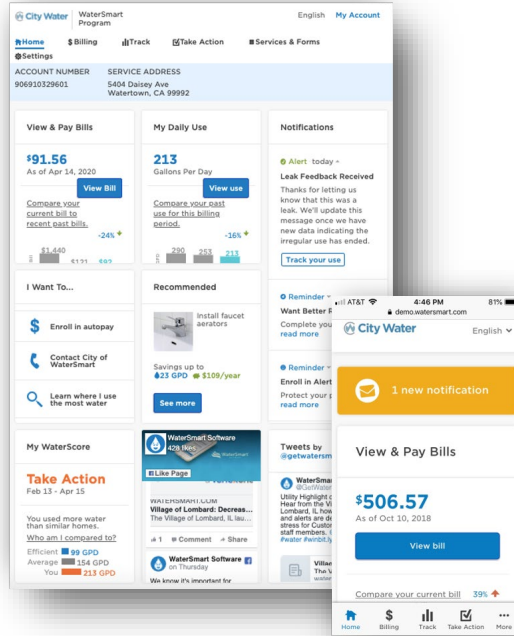
WaterSmart employees will be subject to information security controls. This includes background checks, the signing of non-disclosure agreements, and an acknowledgement of our acceptable use and security policy.

All data transmitted between WaterSmart and the IRWD is always transferred in an encrypted fashion, using either SSL, SSH, PGP, or TLS as appropriate for the channel.

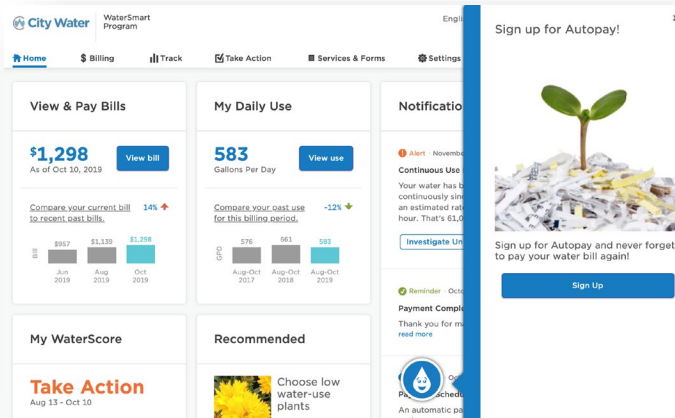
WaterSmart engages a 3rd party to test our network security and compliance with best industry practices as outlined in the OWASP Top Ten application security principles. The public attestation of this adherence is available on request.



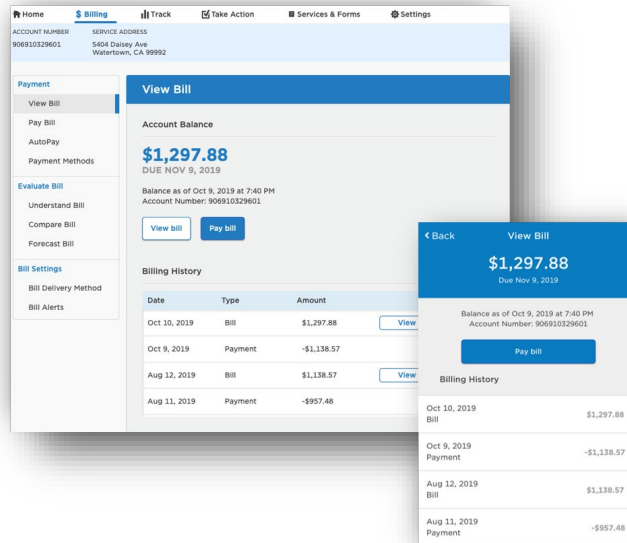
Below are some examples of the **WaterSmart** portal.



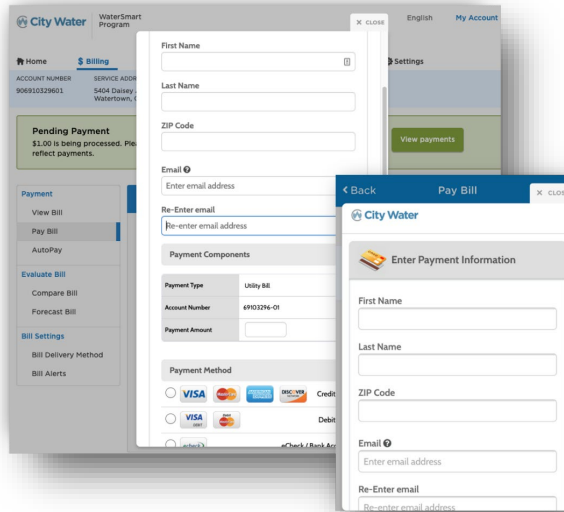
Customer Portal Home Page on Web and Mobile



'Splash' Notifications in the Portal

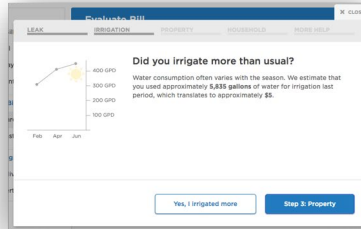
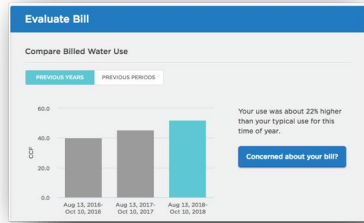
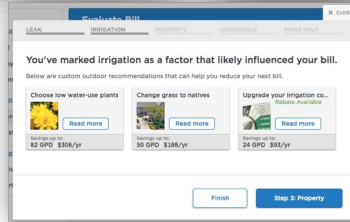


Bill Presentation in the Customer Portal on web and mobile



Embedded Payments with Paymentus in the Customer Portal on Web and Mobile



Evaluate Bill

You've marked irrigation as a factor that likely influenced your bill. Below are custom outdoor recommendations that can help you reduce your next bill.

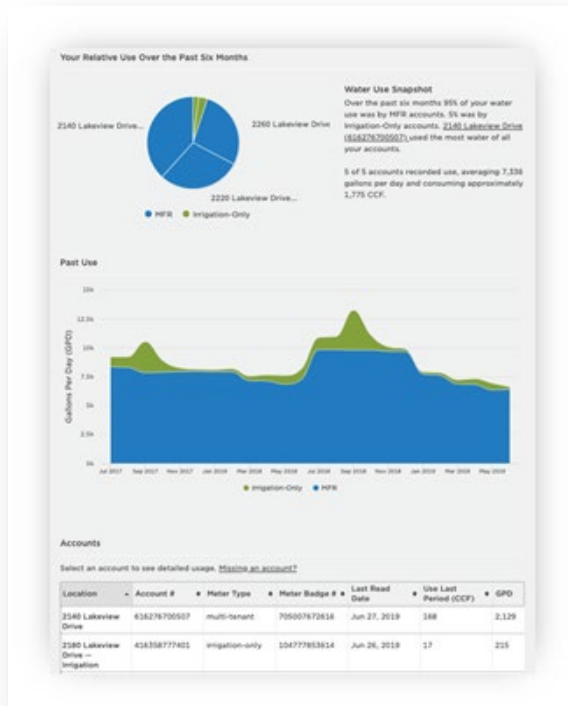
Choose low water-use plants [Read more](#)

Change grass to natives [Read more](#)

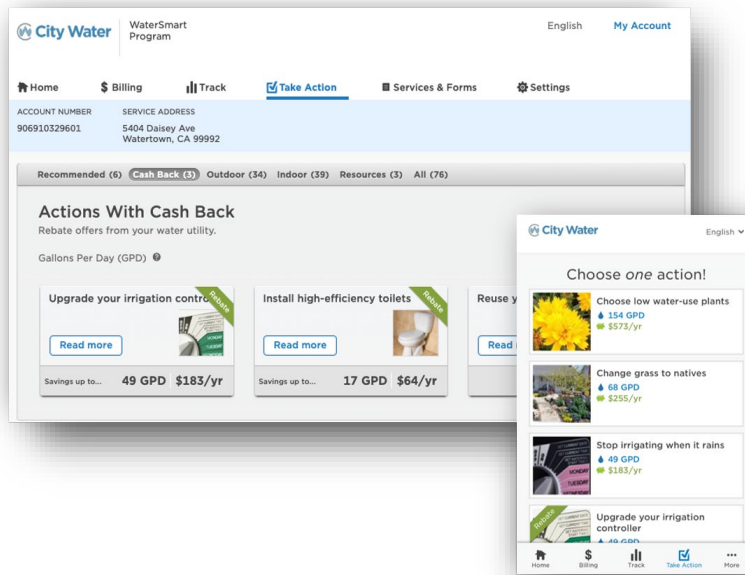
Upgrade your irrigation co... [Read more](#)

Savings of 5 GPD \$56/yr Savings of 50 GPD \$38/yr Savings of 24 GPD \$81/yr

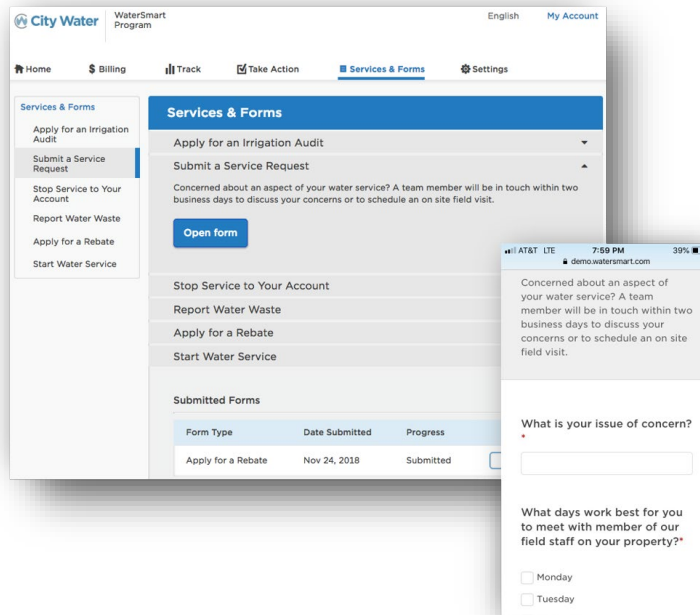
[Finish](#) [Step 3: Property](#)



Rolled-up View of Consumption in the Portal upon Linking Multiple Accounts



“Take Action” Personalized Recommendations in The Customer Portal on Web And Mobile



Customer Portal “Services & Forms” Page on Web and Mobile

- Specify the data requirements, data format, tools, methodology and technology utilized to securely transfer data to and from Consultant's site.

Data Requirements and Format

WaterSmart has included the Data Specification file as [Attachment A –WaterSmart Data Specification](#).

WaterSmart enacts standard controls, policies, and procedures to ensure the security of each utility's data and customer provided information, including but not limited to choosing a reputable cloud-server vendor with appropriate physical security of server infrastructure, secure public-private key-based login to all WaterSmart server infrastructure, password authentication on all Web site interaction, and audit logging. WaterSmart will provide the Utility with a private, secure FTP destination for regular delivery of the data. This secure FTP site will be hosted on WaterSmart's server infrastructure. We will also use a secure file transfer site set up by the utility if preferred.

For clarity, WaterSmart has waived any associated fees for data implementations as the WaterSmart program is already live and healthy.

- Specify the platform and programming language used to develop the web portal.

WaterSmart uses a LAMP stack (Linux Apache MySQL w/ PHP, Python, and JavaScript).

- Include a sample of the web-based application, demonstrating functionality, design, and content with your proposal

Please refer to previous response to: *Sample format, design, and content of web-based application and functionality in the proposal*

- Description of security and privacy controls for all personally identifiable information provided to selected consultant in service of project, including procedures for data protection, cyber-security, and security breaches.

WaterSmart has provided our response to these requirements in [Section 1.4 Security and Privacy Controls](#).

- Requested changes to the IRWD Professional Services Agreement, Exhibit "A".

WaterSmart has provided our response to this agreement in [Section 9. Contract](#).

- Completed IRWD Vendor Questionnaire, Exhibit "B".

WaterSmart has completed this questionnaire and included it with this response submission.

Task 1: Program Design

The Consultant shall develop the proposed content for the customer-facing web application and provide sample format, design and content of the web-based application and functionality in the proposal. The Consultant shall utilize monthly water consumption data provided by IRWD to create a water customer-facing dashboard display of water use and water budget for residential, commercial, industrial, and institutional customers, as well as property managers and landscape contractors.

The Consultant shall have the ability to design and distribute by mail, SMS text, or email, customer water use reports, alerts, and notifications at a minimum of once a month per account. Customer water use reports for property managers and landscape contractors should allow the grouping of several accounts to provide a list of assigned accounts with easy access to view information on water use performance for each account. Accounts should be able to be included in multiple end user reports.

Information shall also be available to customers in an on-line web or portals with an appealing graphic and user-friendly interface that is compatible with mobile phones. An agency facing dashboard shall be available to IRWD.

Requirements

- Ability to configure the home page based on the IRWD's priorities. All web applications and customer report correspondence shall be branded with the Irvine Ranch Water District's logo.

Confirmed. Please see WaterSmart's response to [Section 1.1 Customer-facing Web-based Portal](#) for our response.

- Establish with IRWD a regular transfer of customer data including but not limited to meter reads, customer data, consumption history, GIS data, weather station data, rebate data, and program participation data. Ability to extract data from back end and securely transfer data.

Confirmed. WaterSmart has already established a regular transfer of customer data including but not limited to meter reads, customer data, consumption history, GIS data, weather station data, rebate data, and program participation data with an ability to extract data from the back end and securely transfer data.

Currently, IRWD is providing data updates from the billing/ CIS system (approximately once weekly) and **WaterSmart** is ingesting and applying those data updates within **two hours** of those reports being submitted to the SFTP by the utility.

The frequency of data updates is dependent on the frequency of data report extract and submission to the established SFTP.

WaterSmart has developed processes that have successfully delivered over 200 programs of similar design with zero failed implementations.

WaterSmart also maintains controls to monitor any potential issues in this area. The File Upload Report in the currently implemented Utility Dashboard Data Transfer module provides a record of data reports submitted, as well as a link to retrieve those files on-demand:

<https://admin-irwd.watersmart.com/index.php/dashboard/dashboardSetup/data>.

Additionally, staff can enroll to receive automated email notifications for both successful data uploads and late files. These controls are meant to provide guidance and notification to IRWD staff to ensure no significant issues arise.

WaterSmart has provided our data specification file as ***Attachment A – WaterSmart Data Specification***.

- **Establish with IRWD a secure transfer or data export capability for self-reported customer information and account attributes.**

Confirmed. WaterSmart can set up exports of data collected (as frequently as daily) from customers to the secure file transfer site. IRWD can then import the data to the CIS for proper updating.

WaterSmart enacts standard controls, policies, and procedures to ensure the security of each utility's data and customer provided information, including but not limited to choosing a reputable cloud-server vendor with appropriate physical security of server infrastructure, secure public-private key-based login to all WaterSmart server infrastructure, password authentication on all Web site interaction, and audit logging. WaterSmart will provide IRWD with a private, secure FTP destination for regular delivery of the data. This secure FTP site will be hosted on WaterSmart's server infrastructure. We will also use a secure file transfer site set up by IRWD if preferred.

- **Disseminate reports once per month per customer, with the ability to increase/decrease frequency to optimize the effectiveness of the program.**

Confirmed. WaterSmart can create automated, regular reports to push information to staff including Customer Portal activity, including Portal Registration Rate by Source (e.g., mail vs. email), Portal Visit Frequency, Top Actions, Method of Visit (mobile vs. desktop), Customer Profile Updates, Acquired Email Addresses by Source, and much more.

WaterSmart can schedule Customer Water Use Reports to be delivered on a monthly cadence, or on any cadence that is requested by IRWD. If the frequency of Customer Water Use Reports increases to the point that the total number of Print reports exceeds the annual total agreed upon in contracting, additional fees may be charged. Email reports are unlimited.

- **Provide routine maintenance and program performance reporting for the five-year term of the program.**

Confirmed. IRWD's Customer Success Manager will meet with the Program Manager on a regular cadence to discuss the program, address issues, and report on program performance.

WaterSmart tracks many engagement metrics, such as email opens, clicks, leak outcomes, registration, etc., available in the Utility Analytics Dashboard for the District's use.

The 'Take Action' page within the customer portal promotes engagement with conservation programs, and Forms can be used for enrollment in programs or for submitting rebate applications. All actions pledged by customers on the Customer Portal are tracked and displayed to IRWD staff on the 'Customer Intelligence' page of the Dashboard.

WaterSmart optionally offers a conservation Program Participation module which measures the impact of conservation programs. WaterSmart utility partners use this module to study the impact of different water efficiency programs, such as toilet rebates, rain barrels, weather-based irrigation controllers, landscaping workshops, and more.

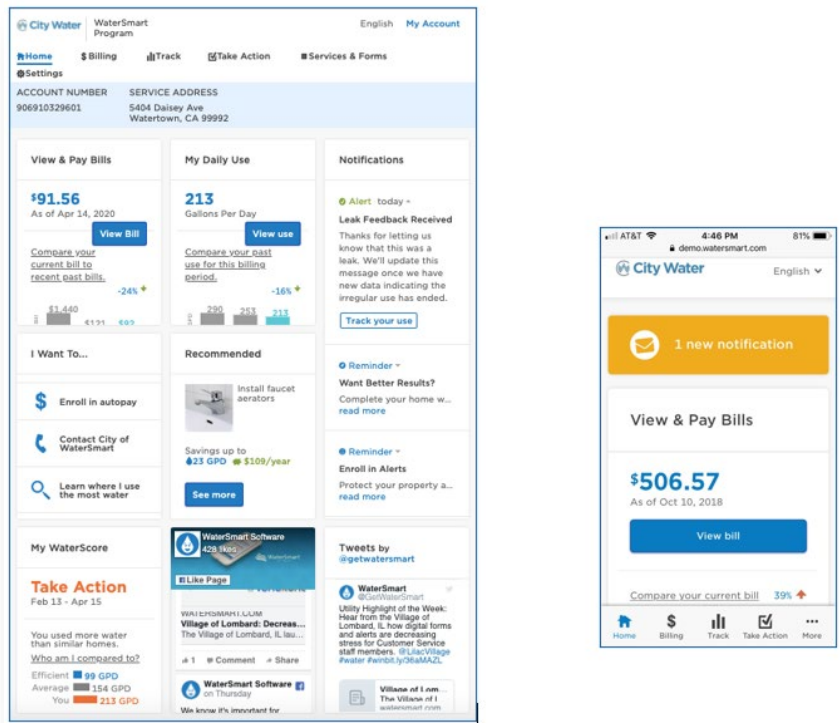
1.1 Customer-facing Web-based Portal:

Ability for customers to view dynamic, personalized information on why a bill might be high and what can be done to reduce future consumption including:

Confirmed. The WaterSmart designated customer success manager will work with IRWD’s designated project manager during set-up and throughout the duration of our agreement to make sure that platform features are set up in a way that best serves IRWD’s needs.

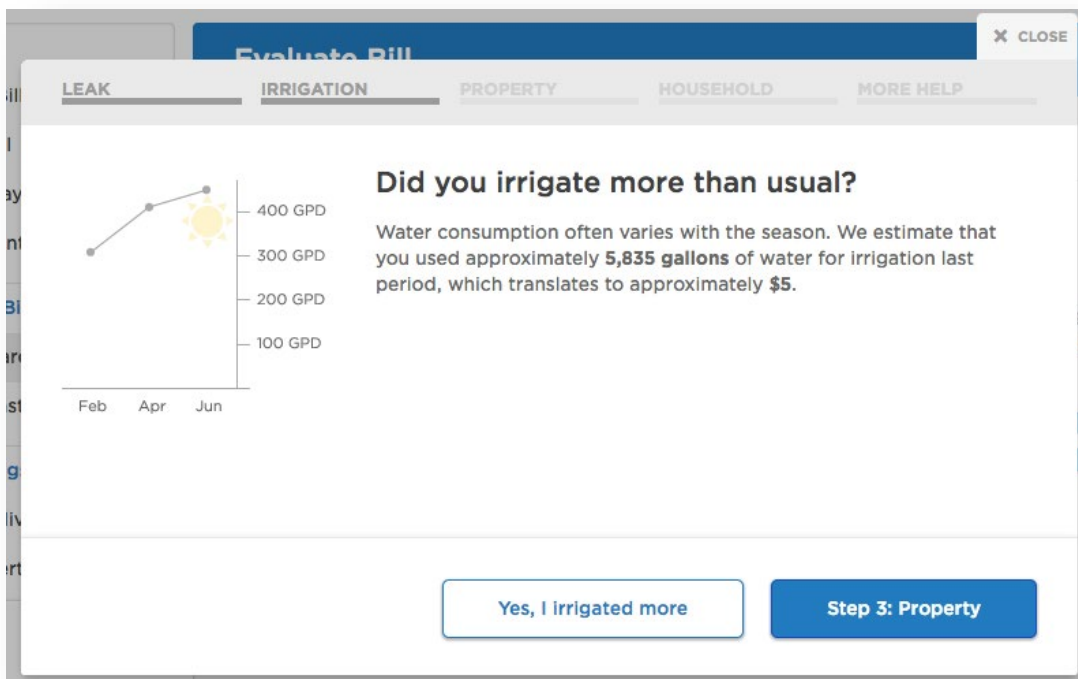
IRWD staff can configure the main tiles of the Portal Home Page based on your priorities. The modular design of the Portal Home Page allows various tiles (e.g., View & Pay Bills, I Want To..., etc.) to be arranged in order of importance for IRWD.

WaterSmart works with IRWD to configure the Customer Portal with IRWD’s logo and contact information. IRWD’s logo also appears on all communications sent to end users. Below is an example of the customer portal on web and mobile.

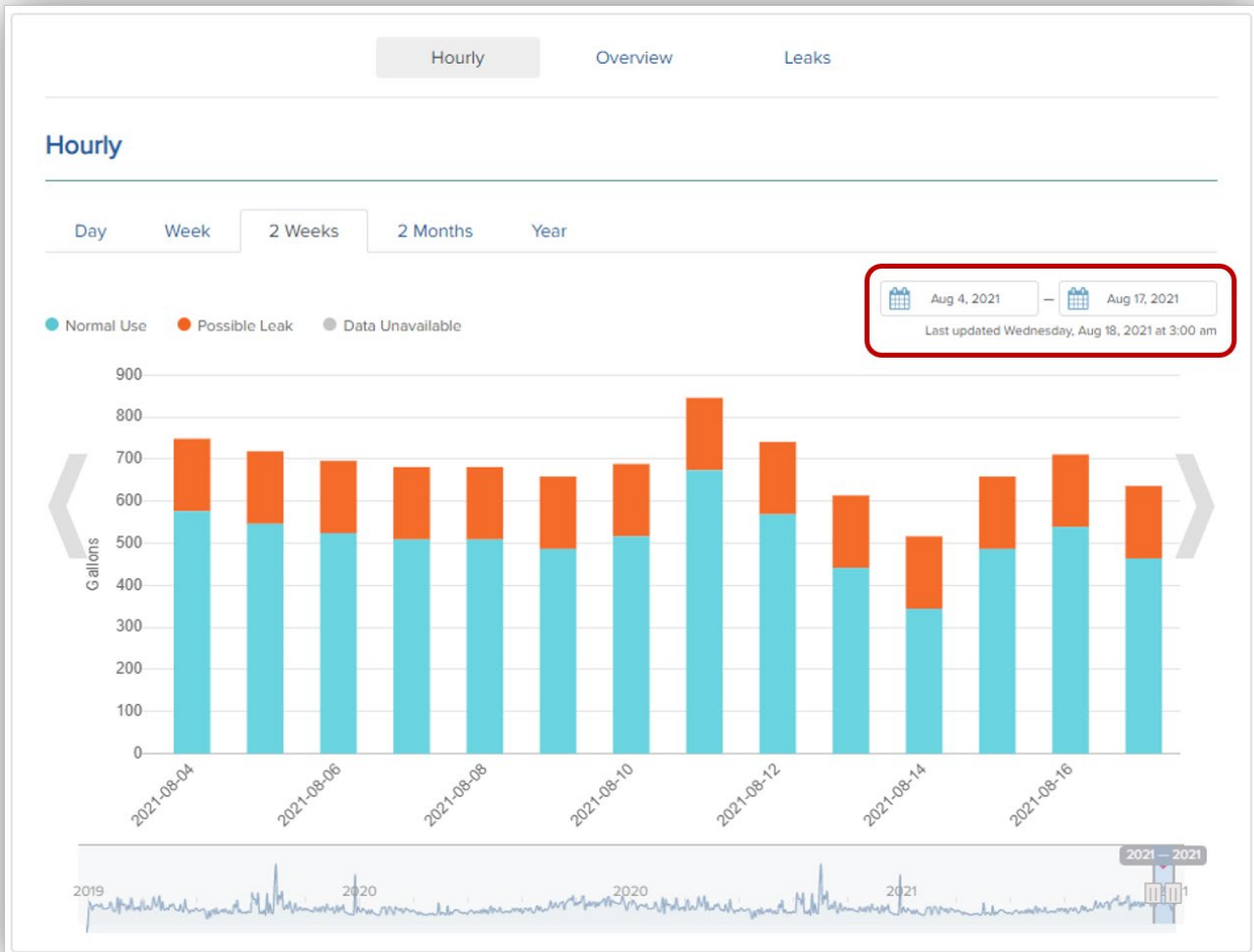


- **Personalized consumption displays in gallons per day, week, month, year, and billing cycle. Also, the ability to compare actual monthly usage to personalized monthly water budget.**

Confirmed. The **Bill Explainer Wizard** (shown below) on the Customer Portal analyzes a customer's billing period consumption data in conjunction with their property data and information collected in their Household Profile to provide a personalized assessment of the most likely drivers for their bill amount. Likely causes may include a leak, over-irrigation, a rate increase, or a longer billing period length. IRWD staff can see the same information as the customer on the Utility Dashboard, supporting their efforts to respond to customer calls about perceived high bills in a faster, more satisfying manner.

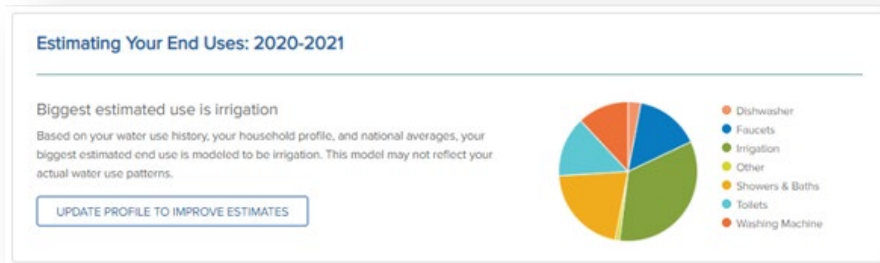


Customers can view their consumption data in gallons per day and a range of increments, and reads can be seen monthly, over the course of the year (to understand seasonality), compared to previous periods and years, or relative to IRWD goals. Residential customers can also see consumption comparisons to similar households (based on geography, number of occupants and size of irrigable area) as well as their end use disaggregation. Below is an example of a customer's view of their consumption during a specified date range.



- Disaggregated water consumption estimates for indoor and outdoor usage, or at least explain indoor versus outdoor consumption and water budgets, if applicable based on the customer account type.

Confirmed. The disaggregation pie chart on the residential Customer Portal models the customer’s use based on the data provided by the customer in their profile, past use data, regulatory standards, property data, and studies of household water use.



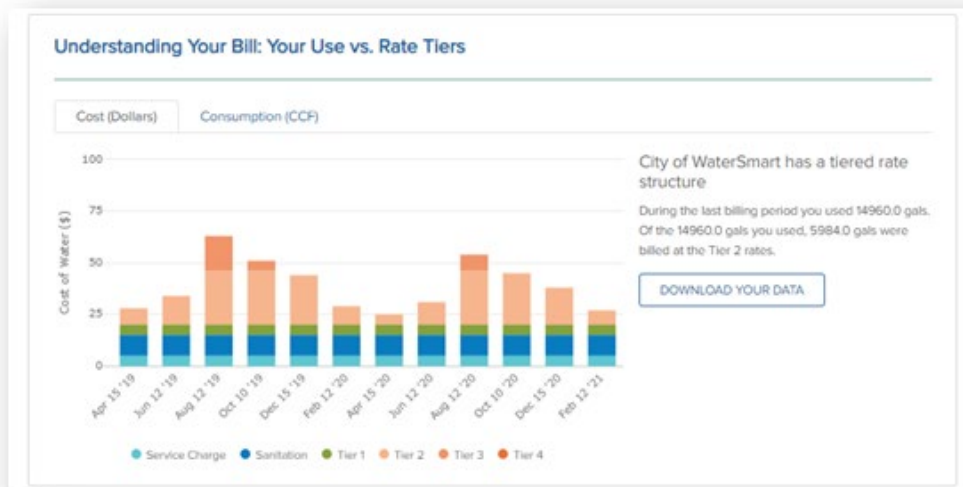
- Display outdoor water consumption data in context of evapotranspiration and precipitation data (provided by IRWD) to inform users of how weather impacts outdoor water use.

Confirmed. Customers can view how their use varies relative to changes in the weather on their ‘Seasonal Use’ chart, located on the “Track Usage” tab of the Customer Portal. The Seasonal Use chart provides an overlay of the customer’s usage history with local temperature and precipitation data pulled from World Weather Online’s weather data API. World Weather Online uses the customer’s zip code to identify the weather station closest to the customer’s property.



- Ability to view water consumption by rate tiers including cost of volume of water within each tier.

Confirmed. The IRWD can display its rate tiers in the Customer Portal. **WaterSmart** will sum water use within a billing period and extrapolate current use to the end of the period to provide the customer with an estimate of expected volumetric consumption. If the IRWD provides the proper rate schedule for each account, then water bills can also be estimated.



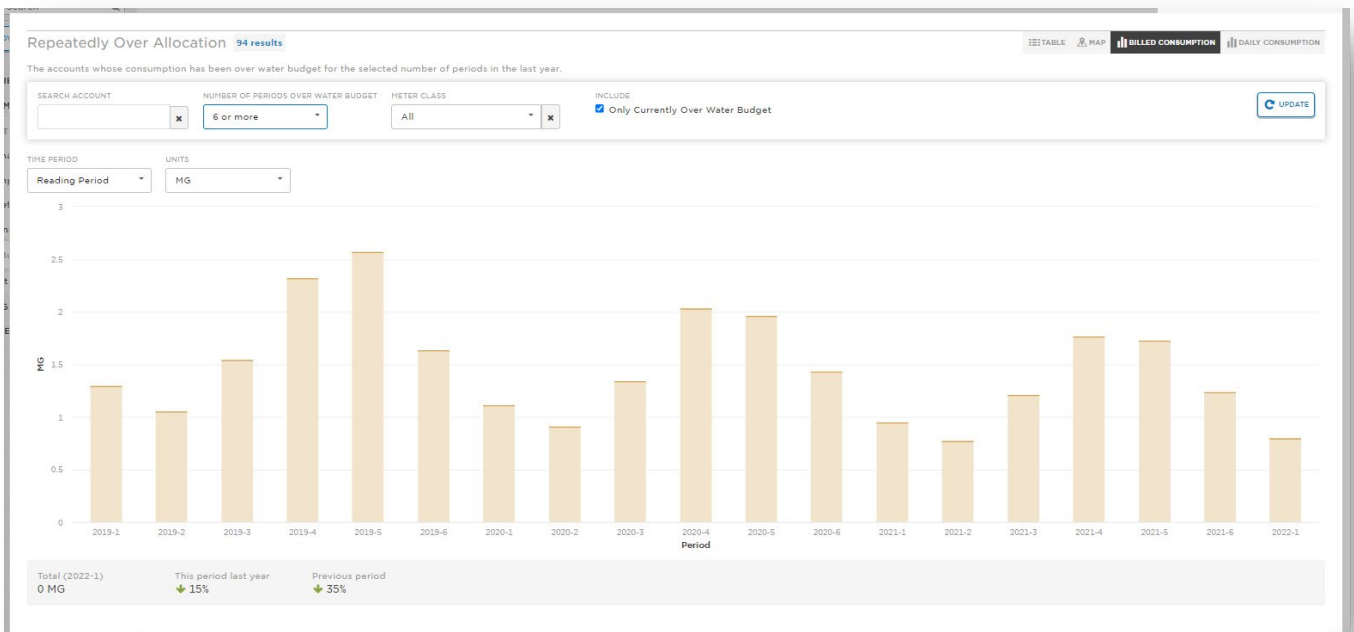
- Ability to view current and historical consumption, water budget, and weather data.

Confirmed. IRWD customers can see a chart of their current and historical water use compared to a water budget, allocation or consumption goal. Water Budgets (which can also be labeled as Allocations) are sent to **WaterSmart** in a regular data feed and are then displayed alongside consumption in the Utility Dashboard and Customer Portal. Consumption goals can be displayed the same way. These have been calculated as a percent reduction from the customer's historical use, but this calculation is parameterized to fit the utility's requirements. Below is an example of a customer's view of their consumption goals.



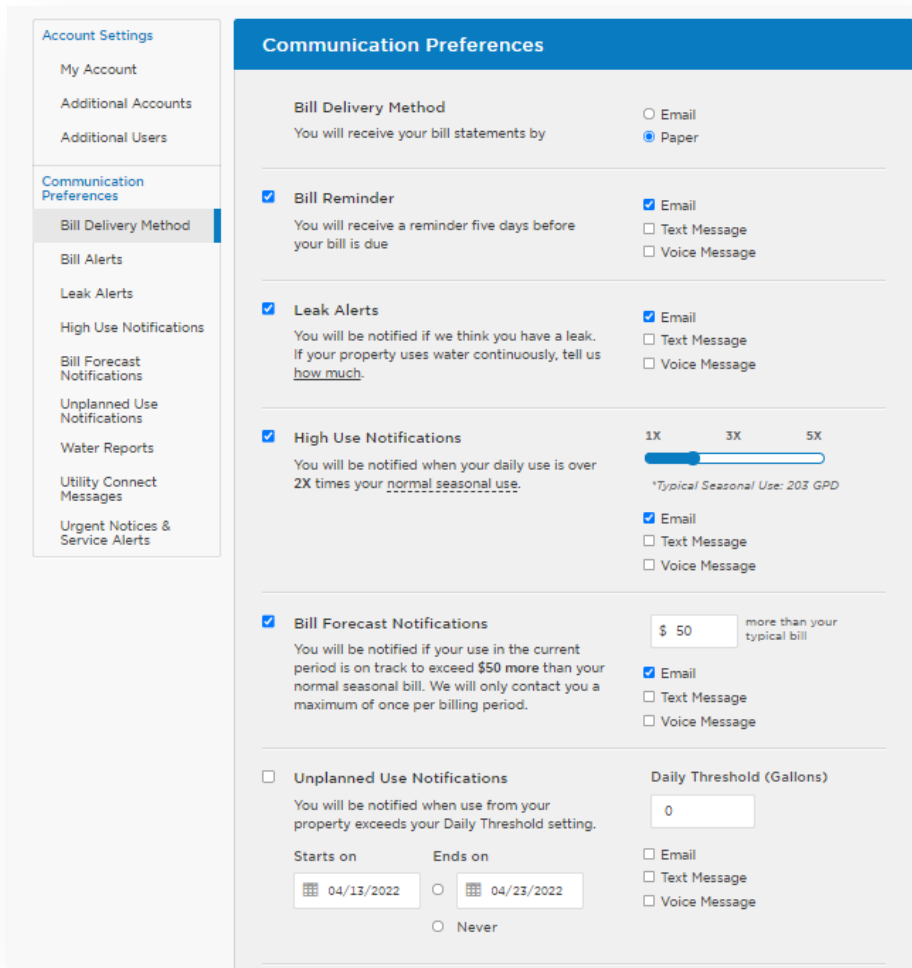


The Utility Dashboard contains reports of the accounts that are Over Allocation, Over Budget, or Did Not Meet Reduction Goal for one or more periods to aid in tracking and outreach. Below is an example of the report for customer repeatedly over allocation within the Utility Dashboard.



- Ability to collect user entered data:

Confirmed. In the Customer Portal, the “Settings” section allows customers to update contact preferences and contact information as well as add additional accounts and additional users any time of day, seven days a week. The “Household Profile” allows a customer to provide information on their household, fixtures, and habits 24x7 to further personalize recommendations, insights, and charts.



WaterSmart allows for the customer-entered information to be represented on the Dashboard, included in automated reports, and pushed to IRWD on a pre-determined cadence.

- **Residential:** on home size, irrigated square footage, number of persons in home, livestock, irrigation equipment type, meter reads, and other information useful in comparing water usage of similar properties.

Confirmed. All this information can be updated directly by a customer in their portal through the household survey. Information is then used to compare a household’s usage against a utility’s goal or water budget as well as to similar households. These can be accessed via Water Reports and under the ‘Track my Usage’ page.

- **Non-residential:** number of employees, cooling towers, water using equipment, irrigation equipment, type of irrigation controller, number of irrigation stations, meter reads, landscape maintenance company, property management company, and other information useful in determining water use efficiency and enhancing communication.

Confirmed. The **WaterSmart** irrigation detection module (shown below) is intended to help IRWD identify, contact and effect change with those customers who have excessive irrigation. This is a Utility-facing feature, visible in the Dashboard. By design, individual customers do not see this information. The Irrigators report uses Utility-defined irrigation regulations to flag violators.

Analytics

Consumption

- Consumption History by Day
- Billed Consumption by Period
- Billed Consumption by Year
- Average Consumption by Period
- Irrigators (Last Week)** X CLOSE FULL SCREEN DOWNLOAD

Likely irrigators are those with a consistent pattern of high water use, which is most likely timed irrigation. A green check ✓ indicates irrigation on the right day and a red X indicates irrigation on the wrong day. Days without detected irrigation have neither symbol.

To determine if a customer has irrigated within 48 hours of rain, the start time of each irrigation event is compared to the total amount of precipitation for the prior 48 hours in the customer’s zip code, according to data obtained from World Weather Online’s weather data API. If over 1/4 of an inch of rain fell in the 48 hours prior to the beginning of an irrigation event, then a customer is considered to have irrigated within 48 hours of rain. This status refers to if a customer irrigated within 48 hours of rain in the 7 days prior to the most recent AMI data upload.

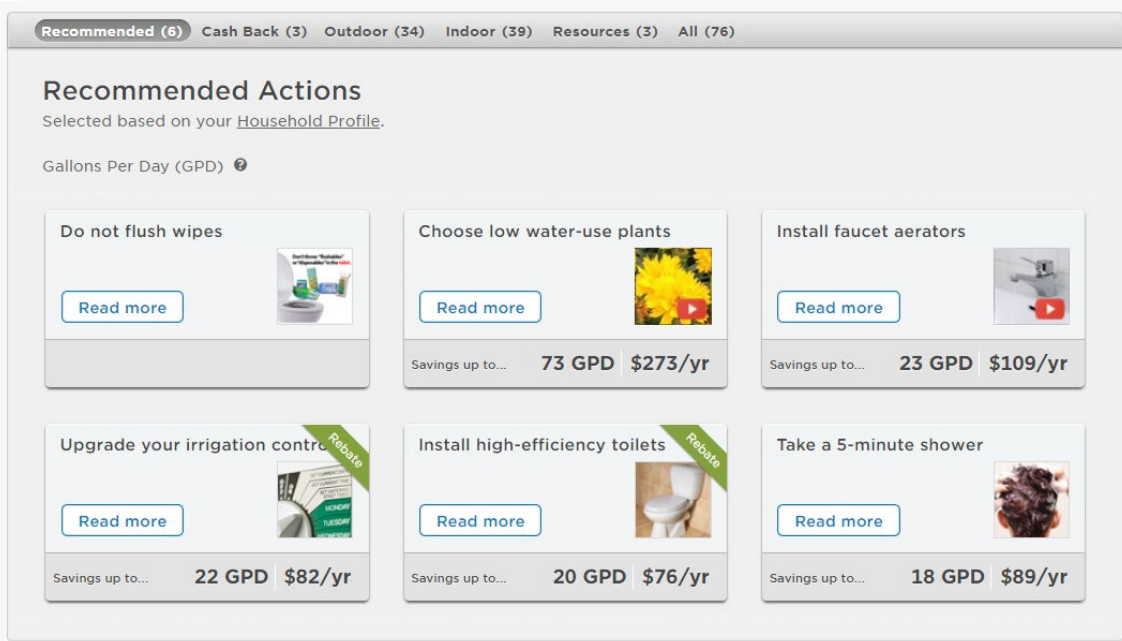
AMI Data through Wednesday, August 18, 2021 at 12:40 AM. This Report is limited to accounts that currently have Active status.

ACCOUNT	IRRIGATION DAYS BY WEEKDAY	IRRIGATION DAYS IN LAST 7 DAYS	IRRIGATED WITHIN 48 HOURS OF RAIN	GPD	MOST RECENT NOTE	MORE COLUMNS
	Su X M Tu W Th F Sa ✓	6	No	1,827		
	Su X M Tu W Th F Sa ✓	6	No	841		
	Su X M Tu W Th F Sa ✓	6	No	722		

- Irrigators (Last Year)
- Top Consumers by Period
- Top Consumers by Year
- Top Changers
- Top SFR Consumers by Irrigable Area
- SFR Benchmarks by Period
- Reading Detail by Account
- Reading Detail Download by Period

- Include a water and money-saving recommendation library, customized for each account profile and configurable by IRWD with step-by-step instructions, informational and educational videos, dynamic estimates of savings potential in gallons per day and dollars per year, and links to IRWD rebate programs.

Confirmed. Customers can receive water and money-saving recommendations through step-by-step instructions, links, and videos, as well as create and save their own plan of pledged actions that align with The IRWD's goals. **WaterSmart** provides dynamic estimates of savings potential in GPD and, using's The IRWD's rates, dollars per year. The library, which varies by season, is unique to each account's profile, consumption history, program participation, and geographic region. The existing **WaterSmart** content library of over 250 recommendations and messages includes information on a variety of general topics, as well as utility-specific information and individual customer data insights. Your staff members have an opportunity to review and add content, as well as prioritize and target each communication based on customers' unique water use, season, property, and behavior characteristics and The IRWD's priorities. **WaterSmart** ensures every message is relevant to the recipient. Below is an example of these customized recommendations within the customer portal.



The screenshot displays a user interface for 'Recommended Actions' based on a household profile. At the top, there are navigation tabs: Recommended (6), Cash Back (3), Outdoor (34), Indoor (39), Resources (3), and All (76). Below the tabs, the title 'Recommended Actions' is followed by the text 'Selected based on your Household Profile.' and 'Gallons Per Day (GPD)'. The main content area features six recommendation cards arranged in a 2x3 grid. Each card includes a title, a 'Read more' button, a small image or video thumbnail, and a summary of savings potential.

Recommendation	Savings up to...
Do not flush wipes	73 GPD \$273/yr
Choose low water-use plants	23 GPD \$109/yr
Install faucet aerators	22 GPD \$82/yr
Upgrade your irrigation controls (Rebate)	20 GPD \$76/yr
Install high-efficiency toilets (Rebate)	18 GPD \$89/yr
Take a 5-minute shower	

- **Align Library messages with most relevant savings actions for customers based on the customer's profile and the season.**

Confirmed. Please refer to previous response.

- **Ability to add items to the Home Page based on common customer requests.**

Confirmed. The **WaterSmart** Customer Portal is highly configurable according to IRWD's preferences and requirements, including the use of Splash notifications, links in the 'I Want To' tile of the Customer Portal Home Page, Notifications, including social media feeds, and targeted messages. During implementation and throughout the program, The IRWD staff will work with your Customer Success Manager to update this configurable content to best suit The IRWD's and your customers' needs.

- **Ability to calculate water use based on last read on file and current read input by the customer.**

Confirmed. Data in **WaterSmart** is updated through the exchange of data reports from IRWD's CIS and billing systems through a secure FTP system.

The customer could report a read update to the utility through the traditional channels or using a Form that can be created by IRWD. IRWD would then update the information in their CIS / billing system and send WaterSmart a data report update that will update the information in **WaterSmart**.

- **Information on the web portal shall be updated and available to customers within 48 hours of data being provided by IRWD.**

Confirmed. Currently, IRWD is providing data updates from the billing/ CIS system (approximately once weekly) and **WaterSmart** is ingesting and applying those data updates within **two hours** of those reports being submitted to the SFTP by the utility.

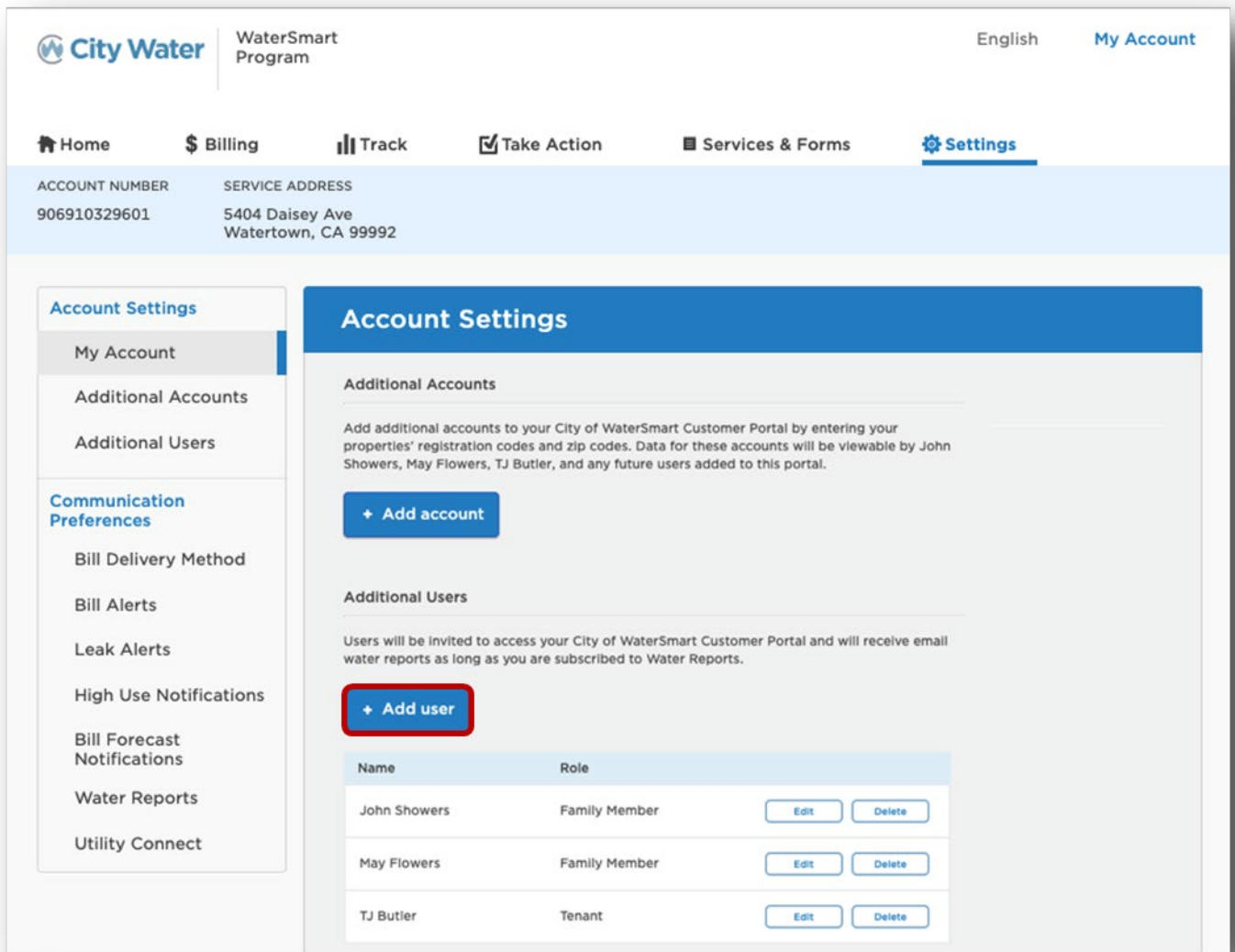
The frequency of data updates is dependent on the frequency of data report extract and submission to the established SFTP. The File Upload Report in the currently implemented Utility Dashboard Data Transfer module provides a record of data reports submitted, as well as a link to retrieve those files on-demand:

<https://admin-irwd.watersmart.com/index.php/dashboard/dashboardSetup/data>.

1.2 Registration and Basic Set up:

- Allow for multiple user login credentials per account.

Confirmed. The primary account holder can add additional users from the 'Account Settings' page of the Customer Portal (as shown below). Additional users can access the Portal using their own unique login, change their customer profile information, take an action, view leaks, and download their data.



City Water | WaterSmart Program | English | My Account

Home | Billing | Track | Take Action | Services & Forms | **Settings**

ACCOUNT NUMBER: 906910329601 | SERVICE ADDRESS: 5404 Daisey Ave, Watertown, CA 99992

Account Settings

- My Account
- Additional Accounts
- Additional Users

Communication Preferences

- Bill Delivery Method
- Bill Alerts
- Leak Alerts
- High Use Notifications
- Bill Forecast Notifications
- Water Reports
- Utility Connect

Additional Accounts

Add additional accounts to your City of WaterSmart Customer Portal by entering your properties' registration codes and zip codes. Data for these accounts will be viewable by John Showers, May Flowers, TJ Butler, and any future users added to this portal.

[+ Add account](#)

Additional Users

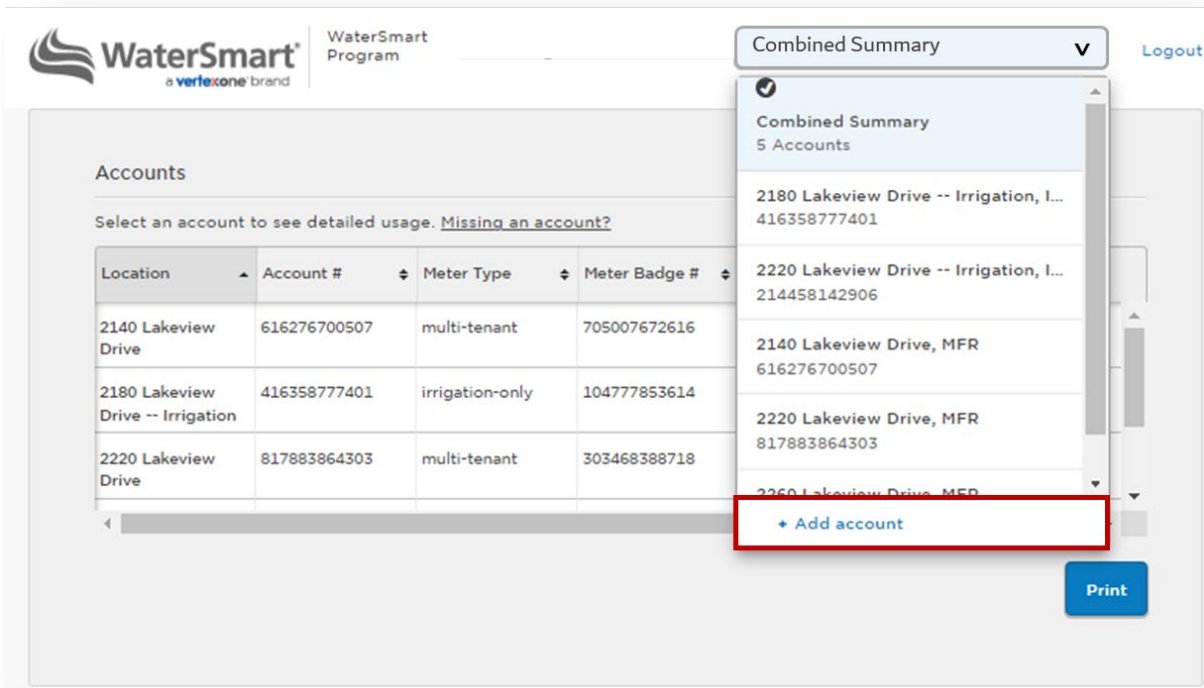
Users will be invited to access your City of WaterSmart Customer Portal and will receive email water reports as long as you are subscribed to Water Reports.

[+ Add user](#)

Name	Role	Edit	Delete
John Showers	Family Member	Edit	Delete
May Flowers	Family Member	Edit	Delete
TJ Butler	Tenant	Edit	Delete

- Allow for multiple account assignment per user login (e.g., one user to many accounts relationship).

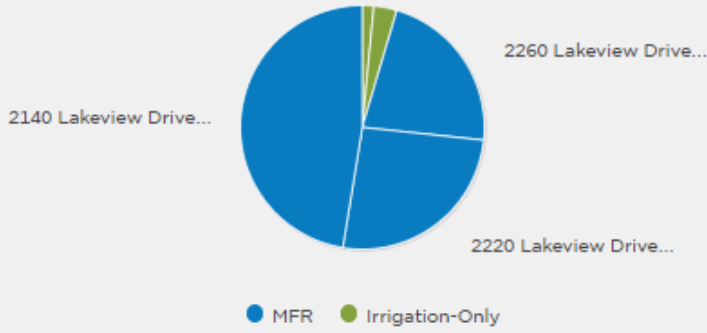
Confirmed. IRWD can designate groups of accounts in its data feed to link multiple accounts or meters to a single login. In addition, customers with multiple accounts/meters can group their own accounts without intervention staff intervention through the 'Settings' panel in the Customer Portal, or by simply using the same email address to register multiple accounts. Once linked, data for multiple properties will be visible in a unified, rolled-up view (as shown below).



The screenshot shows the WaterSmart Customer Portal interface. At the top left is the WaterSmart logo and 'a verlexone brand'. To the right is 'WaterSmart Program' and a 'Logout' link. A dropdown menu titled 'Combined Summary' is open, showing a checkmark icon, the title 'Combined Summary', and '5 Accounts'. Below this, a list of account entries is visible, including: '2180 Lakeview Drive -- Irrigation, I... 416358777401', '2220 Lakeview Drive -- Irrigation, I... 214458142906', '2140 Lakeview Drive, MFR 616276700507', '2220 Lakeview Drive, MFR 817883864303', and '2260 Lakeview Drive, MFR'. At the bottom of the dropdown is a red-bordered button with a plus sign and the text '+ Add account'. Below the dropdown is a table of accounts with columns: Location, Account #, Meter Type, and Meter Badge #. The table contains three rows of data. A 'Print' button is located at the bottom right of the main content area.

Location	Account #	Meter Type	Meter Badge #
2140 Lakeview Drive	616276700507	multi-tenant	705007672616
2180 Lakeview Drive -- Irrigation	416358777401	irrigation-only	104777853614
2220 Lakeview Drive	817883864303	multi-tenant	303468388718

Your Relative Use Over the Past Six Months

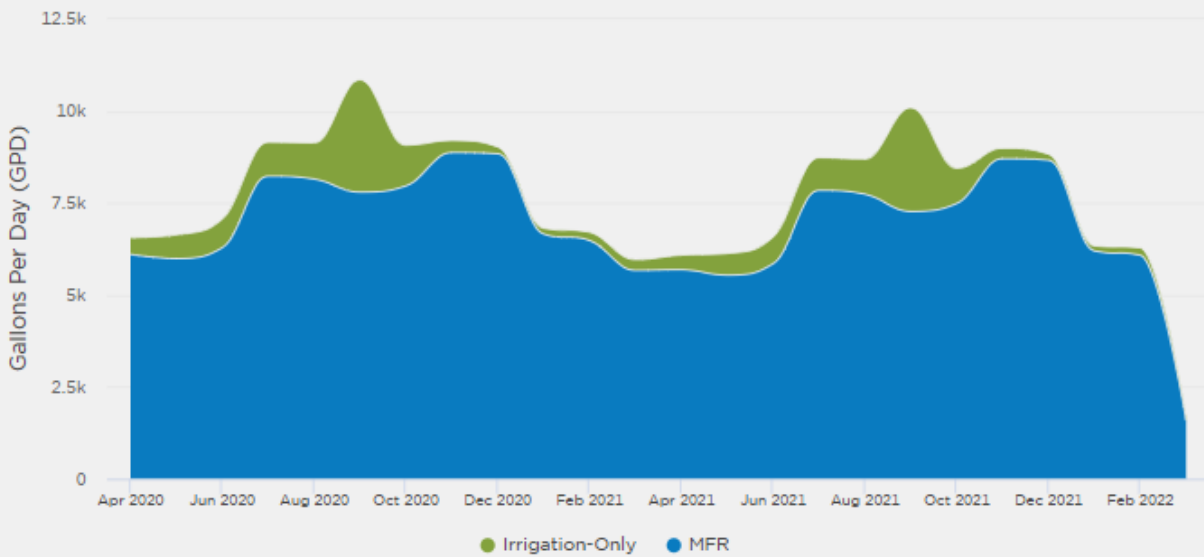


Water Use Snapshot

Over the past six months 95% of your water use was by MFR accounts. 5% was by Irrigation-Only accounts. 2140 Lakeview Drive (616276700507) used the most water of all your accounts.

5 of 5 accounts recorded use, averaging 7,780 gallons per day and consuming approximately 1,893 CCF.

Past Use



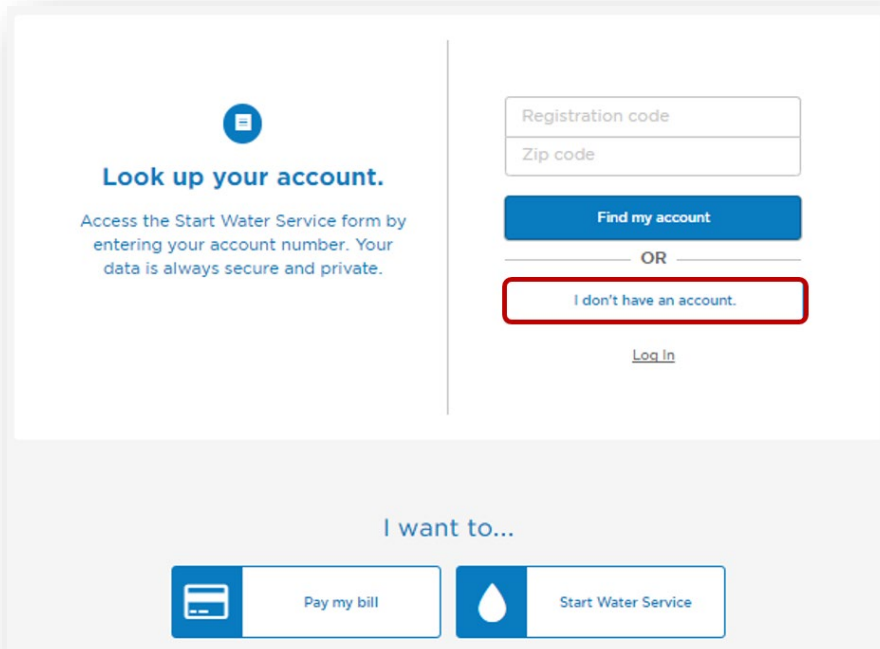
Customer desegregated view of usage across multiple accounts/properties

- Ability to give access (create a secondary, or more, account login) for other users for the same account.
 - Users of residential properties with multiple meters should have the ability to view individual account data detail and roll-up all meter data to create a list of accounts without the need for separate login to access each account detail.
 - Users or managers of multiple properties or commercial properties with multiple meters should have the ability to view individual account data detail or a roll-up of all property consumption and water budget data in a unified view.

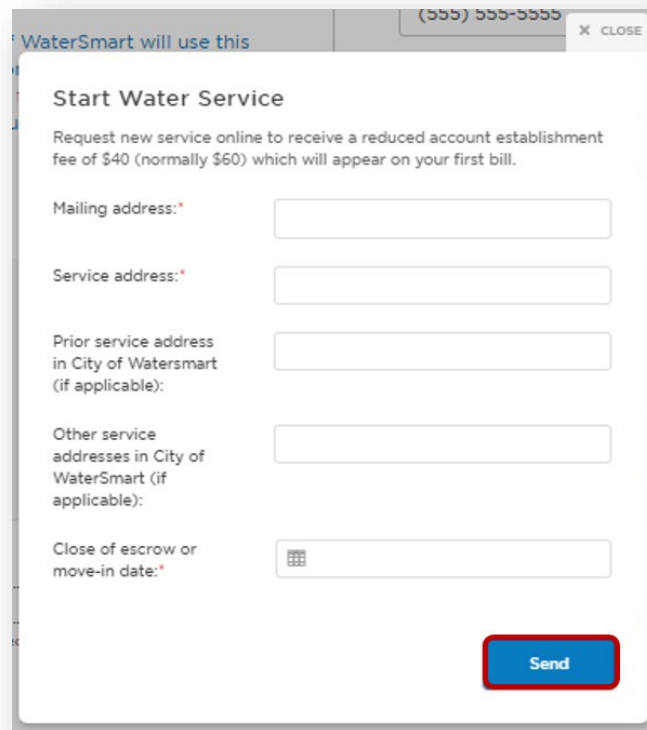
Confirmed. Please refer to WaterSmart’s previous response.

- **Secure registration and login.**

Confirmed. Account initialization requires no IRWD staff intervention. **WaterSmart** provides secure registration and login for each residential, multi-family, commercial, industrial, and irrigation account. On the Customer Portal registration page, the customer is prompted to enter their registration code, or account number and zip code to register. Customers are then prompted to create a password and provide their email address as their username. An email confirmation is sent. Below is an example of the account initialization process.



The screenshot shows a web interface for account lookup. On the left, a blue circle with a document icon is above the heading "Look up your account." Below this, text reads: "Access the Start Water Service form by entering your account number. Your data is always secure and private." On the right, there are two input fields: "Registration code" and "Zip code". Below these is a blue button labeled "Find my account". Underneath is the word "OR" in a thin line. A red rectangular box highlights a link that says "I don't have an account.". Below that is a "Log In" link. At the bottom of the page, under the heading "I want to...", there are two buttons: "Pay my bill" with a credit card icon and "Start Water Service" with a water drop icon.



WaterSmart will use this (555) 555-5555 X CLOSE

Start Water Service

Request new service online to receive a reduced account establishment fee of \$40 (normally \$60) which will appear on your first bill.

Mailing address:*

Service address:*

Prior service address in City of Watersmart (if applicable):

Other service addresses in City of WaterSmart (if applicable):

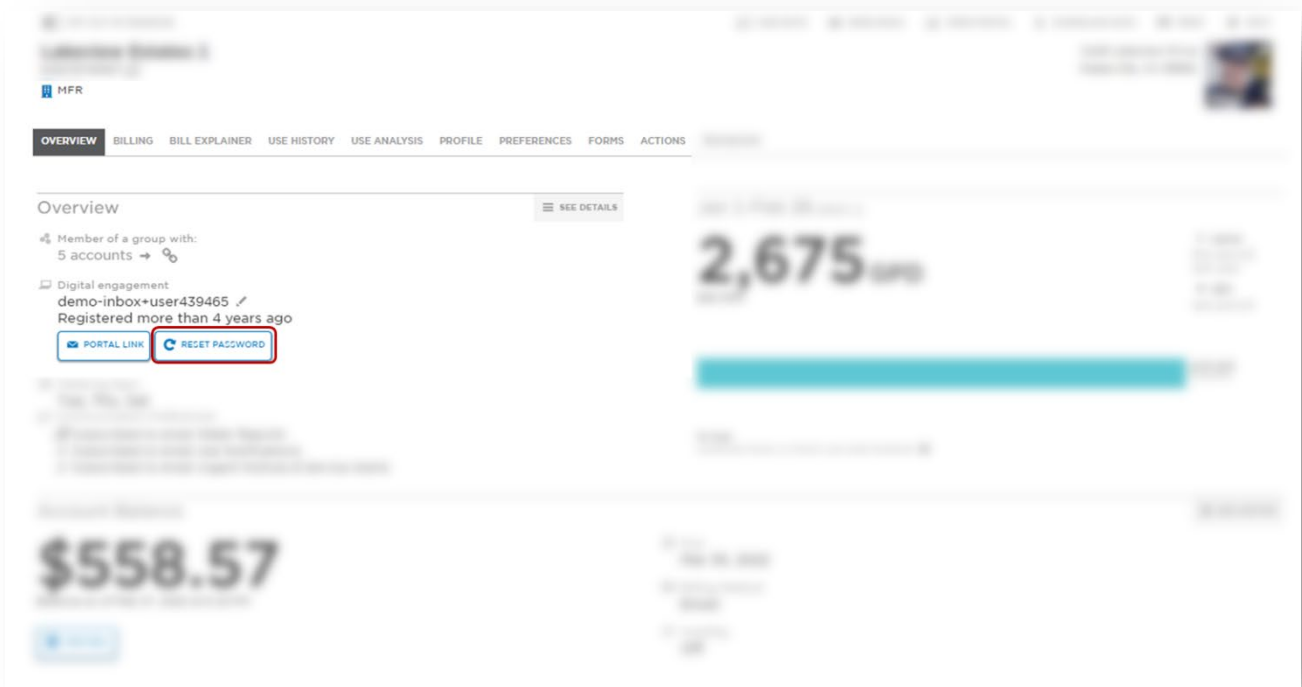
Close of escrow or move-in date:*

Send

WaterSmart’s current password requirements are as follows:

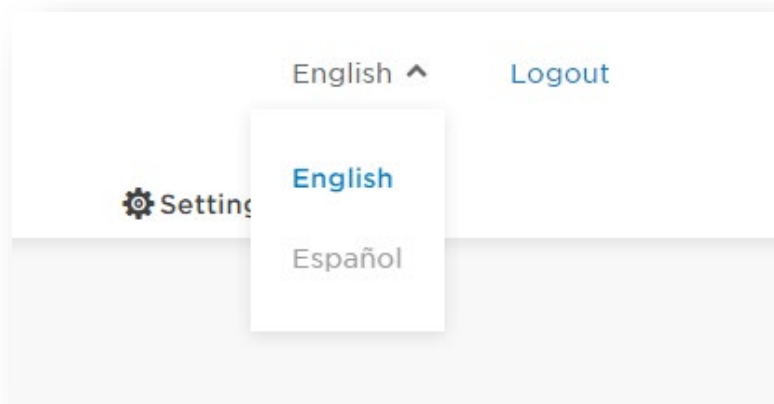
- Passwords need to be a minimum of 8 characters in length
- Once accounts are set up, both staff and customers can use a “forgot password” link to get a new password emailed to their valid email address, if needed. From this forgotten password email, a customer is presented with a link to reset their password. The link remains valid for 24 hours, if not used within 24 hours the process must begin again.

Additionally, IRWD staff can assist a customer in password reset and/or registration via the Details Page in the Utility Analytics Dashboard (as shown below). IRWD users can search for an account by partial or complete account number, meter number, customer name, address, or email address. From the Customer Details Page, a user can hit the ‘reset password’ button to send an email to the customer to update their password or send an email to the customer with instructions to enroll in the portal.



- Availability in multiple languages including English, Chinese, Korean, Spanish, Farsi and Vietnamese.

Confirmed. **WaterSmart** offers English and Spanish as part of its standard offering. Customers can self-select whether they view the Portal in either English or Spanish.



- **Ability for authorized IRWD staff to add or delete a customer profile.**

Confirmed. IRWD users who are granted Admin privileges will have the ability to add or delete a customer profile. Both the Utility Analytics Dashboard and the Customer Portal have differing types of role-based access privileges that will be assigned to IRWD Staff, Managers, and Customers.

User's access privileges determine what each user can see and edit in the Utility Analytics Dashboard:

- **Viewer** users can view all pages in the Dashboard, but cannot edit any customer details, record customer notes, or send emails to customers.
- **Editor** users can view all pages in the Dashboard, edit settings for existing portal users, record notes, and send emails to individual portal users. Editors cannot add new Utility Dashboard users or change settings for existing users except for themselves.
- **Admins** are granted the most privileges. They can view all pages in the Dashboard, add and remove new Dashboard users, /profiles, and edit settings for existing portal users (such as signing up a user for a leak alert), and use Group Messenger to reach multiple portal users by email, text, or voice message.

- **Ability for customer to change their email and phone number.**

Confirmed. In the Portal, the "Settings" section allows customers to update contact preferences and contact information, including email and phone number, as well as add additional accounts and additional users any time of day, seven days a week. The following image is an example of a customer's contact preference options.

Account Settings

- My Account
- Additional Accounts
- Additional Users
- Communication Preferences**
- Bill Delivery Method
- Bill Alerts
- Leak Alerts
- High Use Notifications
- Bill Forecast Notifications
- Water Reports
- Utility Connect

Communication Preferences

Bill Delivery Method

You will receive your bill statements by

Email
 Paper

Bill Reminder

You will receive a reminder five days before your bill is due

Email
 Text Message
 Voice Message

Leak Alerts

You will be notified if we think you have a leak. If your property uses water continuously, tell us [how much](#).

Email
 Text Message
 Voice Message

High Use Notifications

You will be notified when your daily use is over **2X** times your normal seasonal use.

1X 3X 5X

*Typical Seasonal Use: 462 GPD

Email
 Text Message
 Voice Message

Bill Forecast Notifications

You will be notified if your use in the current period is on track to exceed **\$50 more** than your normal seasonal bill. We will only contact you a maximum of once per billing period.

\$ 50

more than your typical bill

Email
 Text Message
 Voice Message

Water Reports

A periodic report including your current water use.

Email
 Paper

Utility Connect

City of WaterSmart communications regarding your water utility account, water use, and important related announcements.

Email
 Text Message
 Voice Message

Unsubscribe from All Communications

- Ability for IRWD to download customer email list to send an email to all users.

Confirmed. The “List Builder” feature within the **WaterSmart** Utility Analytics Dashboard (part of the Group Messenger module) allows IRWD staff members to segment a group of customer accounts for use in Group Messenger. An IRWD staff member can create a list easily based on popular reports, by uploading account numbers from a spreadsheet, choosing individual accounts in the Utility Dashboard database, by drawing a polygon on a map, or by uploading a GIS shapefile.

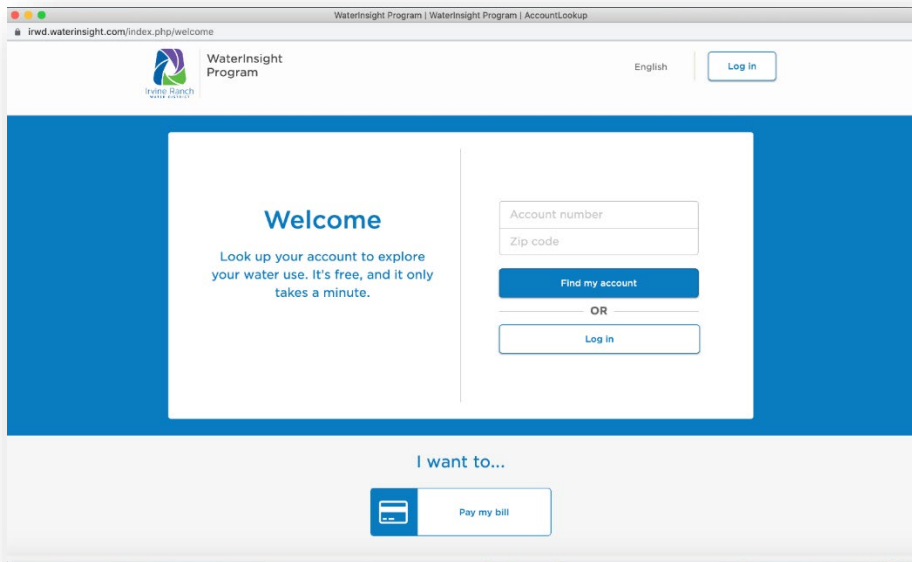
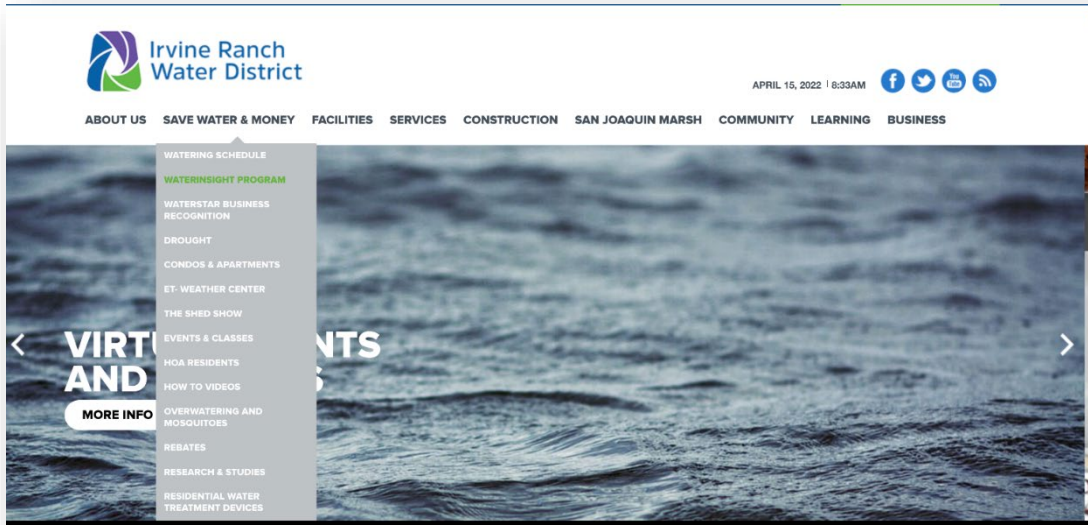
IRWD staff can download the List of customers for use in an external communication system OR the Group Messenger feature allows the IRWD to compose, send, and track timely, targeted emails, SMS text, and voice messages to groups of customers. IRWD staff can personalize messages using personalization variables for each customer, and an email can be completed in minutes.



1.3 Links and Integrations:

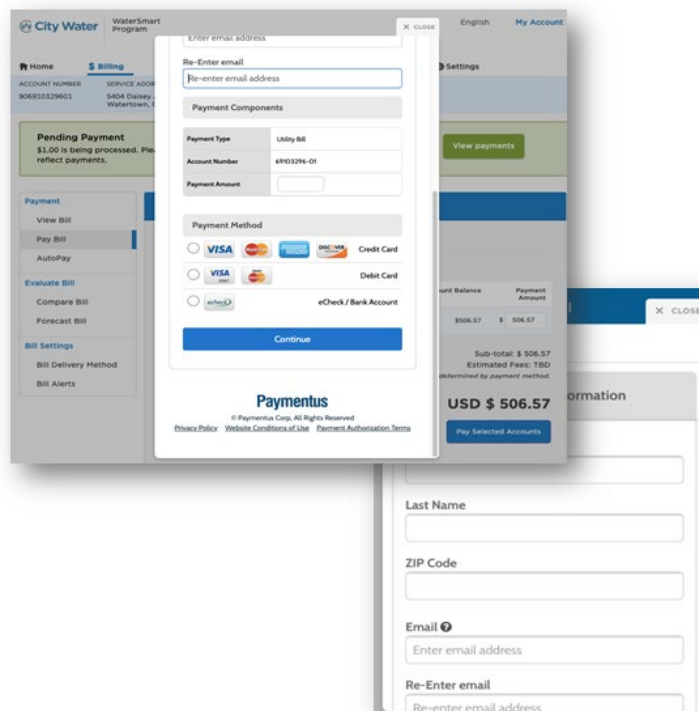
- Ability to offer a link to the portal from the IRWD website.

Confirmed. IRWD currently has a link to the WaterSmart portal from their website as shown in the screenshots below.



- Ability to integrate single sign on verification with IRWD's payment system vendor, Paymentus and utilize IRWD's single sign on (SSO) to access the portal.

Confirmed. WaterSmart has partnered with Paymentus to deliver a Paymentus Embedded Payments Solution from within our Customer Portal. The IRWD customers can view and pay their bills as well as access their alerts, and self-resolution, all within 1 portal using 1 login. Alternatively, WaterSmart delivers a Single Sign-On (SSO) integration with Paymentus, whereby The IRWD customers can navigate from Paymentus to **WaterSmart** without having to login again.



1.4 Security and Privacy Controls:

The customer water use reports and web portal(s) shall present and maintain confidentiality of information such as customer specific water use data, account information, and other identifiable customer characteristics. Consultants must complete the IRWD Third-Party Security Questionnaire and satisfy the following requirements:

- **Proposer shall include evidence of information security consistent with industry standards via a written third-party assessment. The assessment shall include evaluation of the external penetration testing and a web application security assessment.**

Confirmed. WaterSmart enacts standard controls, policies, and procedures to ensure the security of each utility's data and customer provided information, including selecting only best-in-class vendors with multiple 3rd party verifications; for example, Amazon Web Services (AWS) for servers and networking, SendGrid for email delivery, and Twilio for telecommunications. The verifications and certifications of our vendors are publicly available for inspection. WaterSmart engages a 3rd party to test our network security and compliance with best industry practices as outlined in the OWASP Top Ten application security principles. The public attestation of this adherence is available on request.

- **Provide a license for IRWD to use the Consultant's customizable web-based software.**

Confirmed. As part of WaterSmart's Software-as-a-Service (SaaS) platform, employees and customers of IRWD will have unlimited licenses to use the **WaterSmart** solution during the term of the Agreement. IRWD will designate one or more staff as the site Administrator. The Administrator can provide password-protected access to staff with email addresses and grant Viewer or Editor privileges. The Administrator can revoke access to any IRWD employee at any time.

- **Vendor must encrypt customer data in transit and at rest.**

Confirmed. All information is encrypted in transit and at rest.

- **Any IRWD or customer data utilized will not be exported outside of the United States.**

Confirmed. The WaterSmart data centers that host customer applications are in the United States of America.

- **Vendor will not provide or discuss IRWD data with others. All water data is private and confidential and cannot be used in research, data mining or other uses that are not approved by IRWD.**

Confirmed. WaterSmart takes its security and privacy responsibilities very seriously. We do not share personally identifiable customer information or customer-specific water use information with any third

party. Data transferred from IRWD is stored in a database dedicated to The District and its project. The data is not comingled with the data provided by any other entity. WaterSmart does not transfer data offshore for any purpose, including design, testing, development, or delivery. WaterSmart uses anonymous and/or aggregated data (excluding any personally identifiable information) for purposes of project evaluation, research, product development, and other legitimate business purposes.

- **Provide a secure hosting site, approved by IRWD.**

Confirmed. **WaterSmart** is a securely hosted cloud solution. The solution leverages no specific IT integration, software, or hardware requirements of the Utility for the operation of the platform. **WaterSmart** creates daily backups of data and regularly validates the documented restore and failover procedures. Customer data is kept in primary database, backup repository, and secondary backup repository. Backups are performed locally within the hosted SSH-key protected environment, then encrypted using PGP privacy, and pushed securely over SSL to RackSpace's CloudFile storage system. An additional copy of the encrypted backup is pushed to Amazon Web Services S3 storage system for redundancy. No data is stored on WaterSmart's premises. Daily backups are stored for 30 days. After 30 days, weekly backups are stored for several months. Monthly backups are stored for one year. There is no cost to IRWD for this service. The backups are used only for disaster recovery and site-failover.

- **Provide maintenance of the licensed web-based software, including customer support, and include the maintenance protocol in the proposal.**

Confirmed. The **WaterSmart** subscription includes software maintenance, hosting, security, customer support, and backup & recovery services. WaterSmart provides ongoing support for IRWD via the online Support Site. The Support Site can be accessed 24/7 through the Utility Analytics Dashboard, and offers utilities details about product features, FAQ's and training videos. The detailed, comprehensive "Help" feature within the Utility Analytics Dashboard (shown below) is an excellent resource to support the IRWD's customer service representatives and other staff. **WaterSmart** also includes a Utility Analytics Dashboard feature, "Intercom," that allows Utility staff to chat from 6 A.M. to 6 P.M. PST to communicate and engage interactively with our Customer Success team.



For Data Analytics

[Learn More](#)



For Customer Outreach

[Learn More](#)



Dashboard Settings

[Learn More](#)



Product Guides

[Learn More](#)



Product Updates

[Learn More](#)



Video Library

[Learn More](#)

I Want To

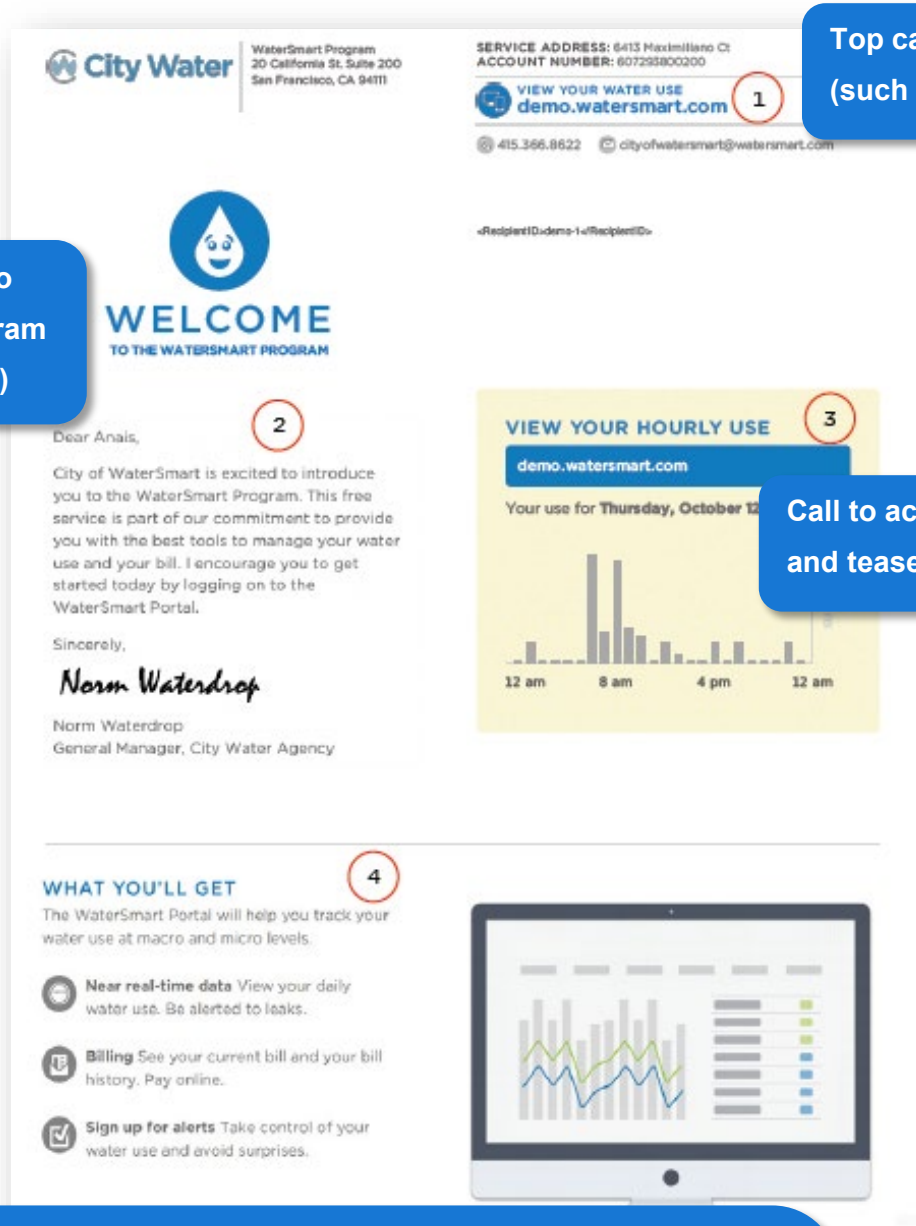
- Access Data Reports
- Direct a Customer to Update Their Profile
- Email a Customer
- Evaluate Consumption Trends
- Leak Detection and Resolution
- Track Compliance with Drought Restrictions
- Track Our Water Report Program
- Update a Customer's Profile
- Track Customer Communication
- WaterSmart Marketing KIT

Task 2: Program Implementation:

Consultant shall develop customer communication tools including outreach material to welcome all report recipients, on behalf of IRWD, custom alerts and reports in coordination with IRWD staff, to inform residents about programs and possible leaks. A utility dashboard shall be developed to provide IRWD with access to all customer data and include routine reports, modules, and tools for performing advanced analytics.

IRWD can deliver WaterSmart Customer Welcome Letters to all account owners. These personalized letters contain IRWD's logo, a custom welcome message from an IRWD official, a description of customer benefits, and login instructions. Following Customer Welcome Letters, IRWD can deliver **WaterSmart** Print Leak Alerts, which are automatically mailed to non-digital customers with detected leaks and contain a snapshot of their leak, quick tips on how to fix leaks, and most importantly, a call to action to login to the Portal and enroll in digital leak alerts. Finally, IRWD can continue to engage customers beyond the Portal with regular Email Water Reports that show them their social comparison, recommended ways to save, custom seasonal messaging, and login instructions.

Below is an example of a Customer Welcome Letter.



Top call to action (such as 'Register for Portal')

Custom message to introduce the program (65 word maximum)

Call to action, link to platform, and teaser graphic

'What you'll get' bullets to explain the benefits of the customer portal. These are based on specific program components including:

- Billing information displayed in the Customer Portal
- Payments (embedded in Portal or integrated with SSO)
- Water Reports
- Social Comparisons
- Customer Survey

In addition, IRWD will have access to our Marketing Kit, containing many promotional assets including web banners, bill stuffers, social media content, artwork, and more. IRWD's designated WaterSmart Customer Success Manager can guide IRWD using best practices from our 150+ projects. Your Customer Success Manager will support IRWD throughout project implementation, launch, and lifetime, and is available by email or phone. IRWD can also use our Live Chat feature or visit our Support Site for support.

- **Establish, with IRWD, a regular transfer of customer data including but not limited to meter reads, variance data, consumption history, GIS data, weather data, rebate data, and program participation with the ability to extract data from back end and securely transfer data.**

Confirmed. Please refer to WaterSmart's response to this requirement in *Task 1: Program Design*.

- **Establish with IRWD a secure transfer or data export capability for self-reported customer information and account attributes.**

Confirmed. Please refer to WaterSmart's response to this requirement in *Task 1: Program Design*.

- **Disseminate customer reports once per month per customer, with the ability to increase/decrease frequency to optimize the effectiveness of the program.**

Confirmed. Please refer to WaterSmart's response to this requirement in *Task 1: Program Design*.

Deliverables:

- 2.1 Customer Communication Content and Tools
- 2.2 Custom Alerts
- 2.3 Customer Reports
- 2.4 Utility Dashboard
- 2.5 Utility Reports, Modules and Analytics

2.1 Customer Communication Content and Tools:

The program must include the ability to compose, send, and track messages to groups of customers based on different characteristics or geographically using GIS. Develop outreach material in coordination with IRWD to welcome all new print report recipients and routine reports using messages from the content library.

Confirmed. WaterSmart believes that providing utilities with options to correspond with their customers is imperative. The Group Messenger module within the **WaterSmart** Utility Dashboard that provides tools for rapid delivery of targeted, timely, and topical messages to groups of customers. The integrated ‘Lists’ tool allows IRWD to create a custom list of accounts to analyze or communicate with. IRWD can use Group Messenger and Lists to reach out to the highest users, inform a defined geographic region of a boil water notice or service outage, target watering day violators with a message to check their irrigation controller, and more. Group Messenger supports multiple communication channels, including email, SMS text, and automated voice.

For more information about the List Builder feature, please refer to “Ability for IRWD to download customer email list to send an email to all users” in [Section 1.2 Registration and Basic Set up](#).

- **Ability for customer to contact IRWD through the portal.**

Confirmed. Customers can communicate electronically with the IRWD staff in a variety of places. They can send direct communications to the IRWD via the ‘Contact Us’ button on the home page of the Portal. With this tool, customers can submit questions or any information they like to staff. Feedback is collected from customers when they reply to the IRWD email communications (leak alerts, Group Messages, etc.) and at the end of the leak resolution flow. All these communications are captured and visible to Utility staff in the Utility Dashboard both in aggregate via the Conversations module or on an individual account basis in the Activity panel on the Customer Details Page. The IRWD staff can easily communicate with

customers through the Dashboard or directly from their email inbox. From the Utility Dashboard, charts and data from the Customer Details page can easily be attached to any outbound message.

- **Ability to record communications with each account and the capability to send an email with relevant data and charts to an individual customer through their profile page.**

Confirmed. Please refer to previous response.

- **Provide Email HTML, or similar, capabilities for web messaging to allow for embedded photos/videos, hyperlinks, template/graphics, and other content customization.**

Confirmed. Group Messenger functionality includes the option to provide Email HTML capabilities for web messaging to allow for embedded photos/videos, hyperlinks, template/graphics, and other content customization.

- **Ability to support multiple communication channels, including email, SMS and automated voice calling.**

Confirmed. The Group Messenger feature allows IRWD to compose, send, and track timely, targeted emails, SMS text, and voice messages to groups of customers. The IRWD staff can personalize messages using personalization variables for each customer, and an email can be completed in minutes.

- **Messaging module to allow IRWD to customize mass customer communications over email, text, and automated voice.**

Confirmed. The Group Messenger system allows IRWD to send timely, targeted emails, SMS, and voice messages to groups of customers. IRWD staff can utilize several templates or compose a custom message, personalize with personalization variables for each customer, and hit send all within minutes.

- **Ability to create groups of customers:**

- **By drawing a polygon over a map of accounts.**
- **Based on popular reports, such as highest users, most excessive users, or leak detection.**
- **Based on account attributes such as number of people, landscape size, previous communications, or program participation.**

Confirmed. The **WaterSmart** Utility Analytics Dashboard offers utility users access to more than 50 configurable standard administrative reports (with integrated maps and messaging) to view and download. These reports support filtering, drill-down and mapping capabilities across all available years and periods of time (limited to data provided by IRWD), customer class, period, customer class,

consumption and more. These reports can be easily exported to Excel for further analysis with a single click.

Comparative data can be viewed and filtered for:

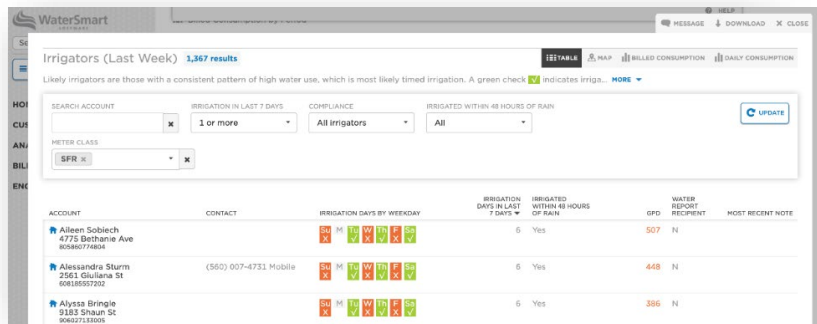
- Billed consumption
- Meter Data Accuracy
- Program Outcomes
- Program Participation (portal registration, special program enrollment, etc.)
- Leak Detection and Resolution
- Irrigation Consumption
- IRWD-specific Water Budget/Allocation Results

And much more.

Additionally, IRWD’s customers can easily view their consumption data in gallons per day and in a wide range of time increments. Reads can be seen over the course of the year (to understand seasonality), compared to previous periods and years, or relative to IRWD’s goals. Residential customers can also see consumption comparisons to similar households (based on locality, square footage, number of bathrooms, number of occupants and size of irrigable area) as well as a percentage-based breakdown of where water is used in the home (irrigation, showers & baths, dishwasher, etc.).

For more information about the List Builder feature, please refer to “Ability for IRWD to download customer email list to send an email to all users” in [Section 1.2 Registration and Basic Set up](#).

The irrigation detection module (shown below) is intended to help the Utility identify, contact and effect change with those customers who have excessive irrigation. This is a Utility-facing feature, visible in the Dashboard. By design, individual customers do not see this information. The Irrigators report uses Utility-defined irrigation regulations to flag violators.



ACCOUNT	CONTACT	IRRIGATION DAYS BY WEEKDAY	IRRIGATION DAYS IN LAST 7 DAYS	IRRIGATED WITHIN 48 HOURS OF RAIN	WATER REPORT RECIPIENT	MOST RECENT NOTE
Aileen Sobiech 4772 Bethelme Ave 802485714834		Su M Tu W Th Fr Sa	5	Yes	507	N
Alessandra Sturm 2561 Giuliana St 60618897920	(503) 007-4731 Mobile	Su M Tu W Th Fr Sa	5	Yes	448	N
Alyssa Bringle 9185 Shaun St 906027133005		Su M Tu W Th Fr Sa	5	Yes	386	N

2.2 Custom Alerts:

Contractor must have the ability to send customized alerts based on usage, customer attributes, and other adjustable parameters determined by IRWD. Alerts should be sent within 24 hours of data receipt and include the following capabilities:

Alerts can be sent through multiple channels—email, SMS text message, or automated voice call. IRWD can decide whether they would like to turn alerts on in an opt-in or opt-out manner. Customers can sign up for or edit their enrollment in various usage and billing notifications in the Customer Portal’s ‘Communication Preferences’ section. IRWD staff also can proactively send service-related alerts through email, SMS or automated phone calls using the Group Messenger module.

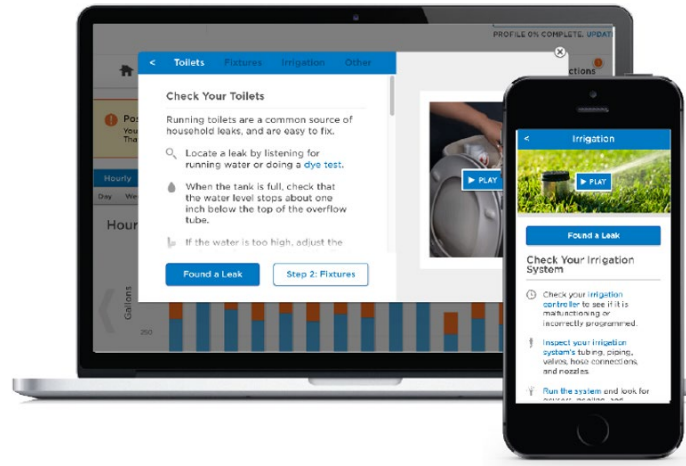
- **Ability for customers to set their own alerts based on usage compared to previous periods and other thresholds (e.g., two consecutive bills over budget).**

Confirmed. IRWD customers have the power to set volumetric and dollar-based threshold alerts in their Portal ‘Communication Preferences’ settings. Customers can set their own parameters for the High Use Notification, which is triggered when current use is set to exceed their normal seasonal use. Customers can also set their own parameters for the Bill Forecast Notification, which is triggered when they are on track to exceed a dollar-defined bill increase. All notifications can be sent via email, text, or voice based on the customer’s preference.

- **Include instructions and videos to provide guidance on finding and resolving the source of irregular use, regardless of whether the user has ever logged into the customer portal.**

Confirmed. The **WaterSmart** Leak Resolution Interface is an interactive instructional wizard that helps customers find and fix leaks.

Upon leak detection, **WaterSmart** automatically delivers alerts through multiple channels (print, email, SMS text message, or automated voice call) and our resolution wizard, complete with comprehensive tips, links, and embedded videos, helps users to resolve the leak on their own, while also gathering information on leak resolution. This is the only closed-loop leak-alerting and resolution system in the market, empowering utility customers to find and fix leaks without calling the utility.



Example of Customer Leak Alert on Desktop and Mobile

- Capability for customers to respond back to alerts to provide IRWD with details on their findings.

Confirmed. The Leaks Module in the **Utility Dashboard for your utility staff** shows all leak events in a selectable time period with summary statistics, such as start date/time, volume, rate, ongoing/stopped status, whether the customer was notified, what actions a customer has taken, and any staff interactions with the customer. The Leaks Module from **WaterSmart** is the most robust and widely used module of this kind in the industry.

Leaks **1,312 results** TABLE MAP

This report shows all leaks identified by WaterSmart's leak detection algorithms. A reading must be abnormally high, compared to historical usage for the account, to qualify as a leak. Non-AMI readings must meet two criteria. First, it must be at least 1,500 GPD. Second, it must be at least 2.0 times as high as the previous highest reading in the past 2 years, or must exceed the previous highest by at least 1,500 GPD. Accounts must have at least 2 years of usage history in order for leaks to be detected. For AMI readings, burst leaks show usage of 76 gallons or more in each of the last 6 hours, while continuous leaks show usage of more than 1 gallon in each of the last 144 hours. Leak rates for non-AMI rates are only an approximation. The value in the report is the customer's last read. This Report is limited to accounts that currently have Active status. Meter classes other than SPR and Irrigation-Only are only eligible for continuous AMI leak detection.

DATE RANGE: Jul 11, 2017 – Aug 10, 2017 SEARCH ACCOUNT ALERT STATUS: All LEAK STATUS: All UPDATE

METER CLASS: All

ACCOUNT	ESTIMATED RATE	ALERT STATUS	LEAK STATUS	MOST RECENT NOTE
Adolfo Stiffemire 3961 Alameda Ct 8544545007	1,189 GPD 169 GPH	Not Alerted	Yesterday started Yesterday stopped	
Aurelio Scheldecker 9545 Kyong St 855180431405	1,510 GPD 188 GPH	Email Alert Sent	Yesterday started Ongoing	
Ashlie Slinger 1183 Nino Ct 104992701007	1,675 GPD 186 GPH	Email Alert Sent	Yesterday started Ongoing	
Amaris Fagley 2743 Joey Dr 603308336007	3,440 GPD 382 GPH	Email Alert Sent	Yesterday started Ongoing	

Sample Report – Active Leaks

2.3 Customer Reports:

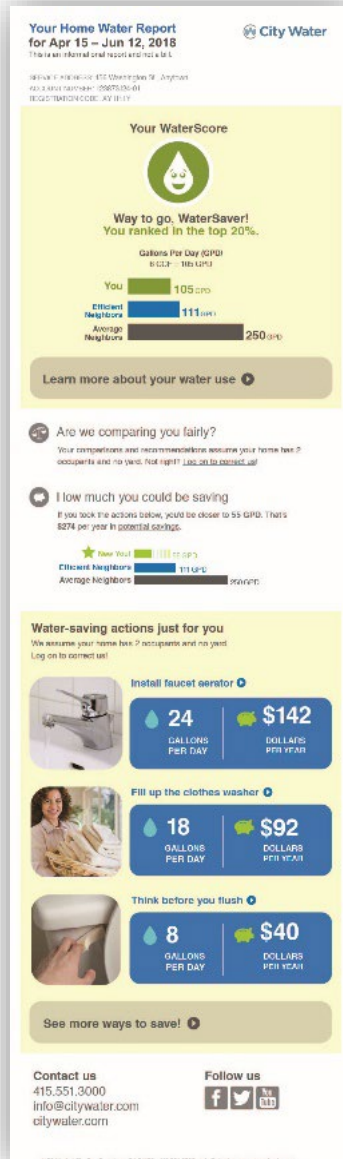
The monthly customer water use reports shall include similar information as the web portal including water use, targeted recommendations, user defined alerts, and water use efficiency program information. Customer water use reports should be available to all customer types (single-family residential, commercial, industrial, institutional, and large landscape) and contain the following content and capabilities:

Confirmed. The **WaterSmart** customer water use report contains several configurable fields. Every customer water use report is customized by the utility's proprietary content personalization to tailor messages and recommendations specific to each end-user. IRWD also can provide WaterSmart with information on available rebates and incentives that should be flagged within relevant recommendations.

For both Messaging and Recommendations, the review process is as follows:

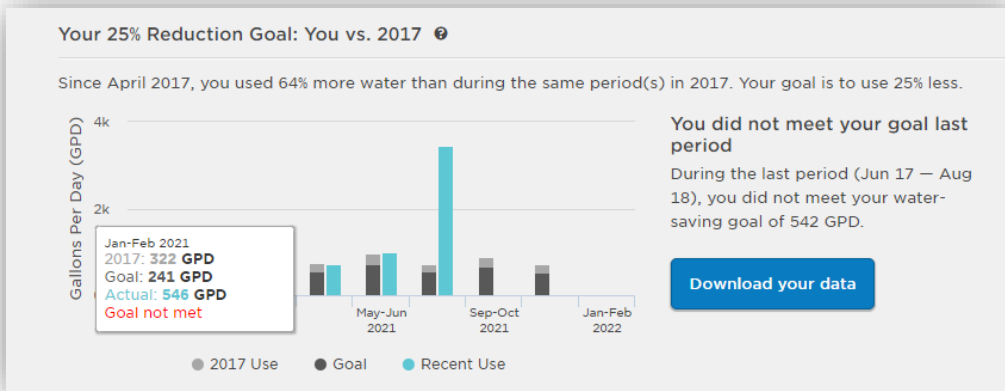
- WaterSmart sends default content to IRWD.
- IRWD's project manager sends back a single, consolidated list of approved messages.
- The WaterSmart customer success manager can offer IRWD the opportunity to proof finalized content of Water Reports and the Customer Portal once they are configured.

The following is an example of a customer water report:



Example of an Emailed Customer Water Report

Additionally, from multiple locations within the Customer Portal, IRWD customers can download their data into excel for further analysis. Alternatively, IRWD staff can access each customers data through the Utility Dashboard via account profiles, attach the customer’s data or charts to an email, and send it directly to the customer (as shown in images below).



ADD NOTE **SEND EMAIL** OPEN PORTAL DOWNLOAD DATA PRINT HELP

5404 Daisey Ave
Watertown, CA 99992
(615) 830-7890

CTIONS PROGRAMS

VIEW

To: demo@watersmart.com

Cc:

Bcc:

Template: <No Template>

+ Add Email Template

Subject:

Formats - B / A -

Dear CUSTOMER,

Regards,

City of WaterSmart

Drag and drop files here or [click](#) to upload.

CHARTS ATTACHED X

X CANCEL SEND

- **Water use consumption should be displayed in billing units (hundred cubic feet) and gallons.**

Confirmed. On the overview chart on the 'Track' tab of the Customer Portal, customers can view use in Cubic Feet and Gallons.

- **Water use comparisons to customer water budget, consumption levels, peer group, water use history, or other parameters as defined by IRWD.**

Confirmed. WaterSmart offers all these capabilities.

For information regarding disaggregation pie chart, please refer to the "Disaggregated water consumption estimates for indoor and outdoor usage, or at least explain indoor versus outdoor consumption and water budgets, if applicable based on the customer account" in [Task 1: Program Design](#).

WaterSmart can display IRWD's rate tiers in a simple, understandable format in the Customer Portal.

Customers can see a chart of their current and historical water use compared to a utility-determined water budget, allocation, or consumption goal. Water Budgets (which can also be labeled as Allocations) are sent to WaterSmart in a regular data feed and are then displayed alongside consumption in the Utility Dashboard and Customer Portal. Consumption goals can be displayed the same way. These have been calculated as percent reduction from the customer's historical use, but this calculation is parameterized to fit a Utility's requirements. The Utility Dashboard contains reports of the accounts that are Over Allocation or Over Budget or Did Not Meet Reduction Goal for one or more periods to aid in tracking and outreach.

- **Include social norming tools and messaging aimed at influencing customer behavior.**

Confirmed. These customer water use reports include comparisons of each household's water use to that of similar households, based on modeled occupancy and yard size. These social comparisons communicate the water use efficiency and total usage compared to similar peers. Additionally, comparisons to the previous billing period and the same billing period in the previous year(s) are available.

- **Future water use projections/goals based on past water use or other parameters as defined by IRWD.**

Water Reports messages and the portal currently display water use goals based on a comparison to the previous year's usage. Annual water use projections are based on year-to-date use also are available.

- **Personalized water savings recommendations based on the customer's household or non-residential irrigation or other water using equipment profile and consumption history.**

Confirmed. The **WaterSmart** Customer Water Use Reports that are currently being delivered to customers by WaterSmart on behalf of IRWD include messages and recommendations with conservation tips and well as links to water-saving resources existent in the **WaterSmart** Customer Portal and to resources provided by the utility. This can include water-efficiency and rebate webpages, how-to videos, and high-bill and leak resolution modules available in an on-demand fashion to customers through the Customer Portal. "I Want To" links in the Customer Portal can also direct customers to helpful **WaterSmart** and external links as provided by IRWD.

Each report includes two messages either chosen from the message library or custom created with content provided by IRWD.

Further detail on the library of available recommendations has been provided in [Section 1.1 Customer-Facing Web-based Portal](#).

An example of a Customer Water Use Report was provided earlier in this section.

- **Information, multimedia content, and links to water use efficiency programs and rebates, and other outreach programs.**

Confirmed. Please refer to previous response.

- **Weather overlay to display evapotranspiration data, temperature, and rainfall from local weather stations visible as graphs. This data can be provided routinely by IRWD.**

Confirmed. Customers can view how their use varies relative to changes in the weather on their 'Seasonal Use' chart, located on the 'Track Usage' tab of the Customer Portal. The Seasonal Use chart overlays the customer's usage history with local temperature and precipitation data pulled from World Weather Online's weather data API. World Weather Online uses the customer's zip code to identify the weather station closest to the customer's property. The following is an example of the Seasonal Use chart



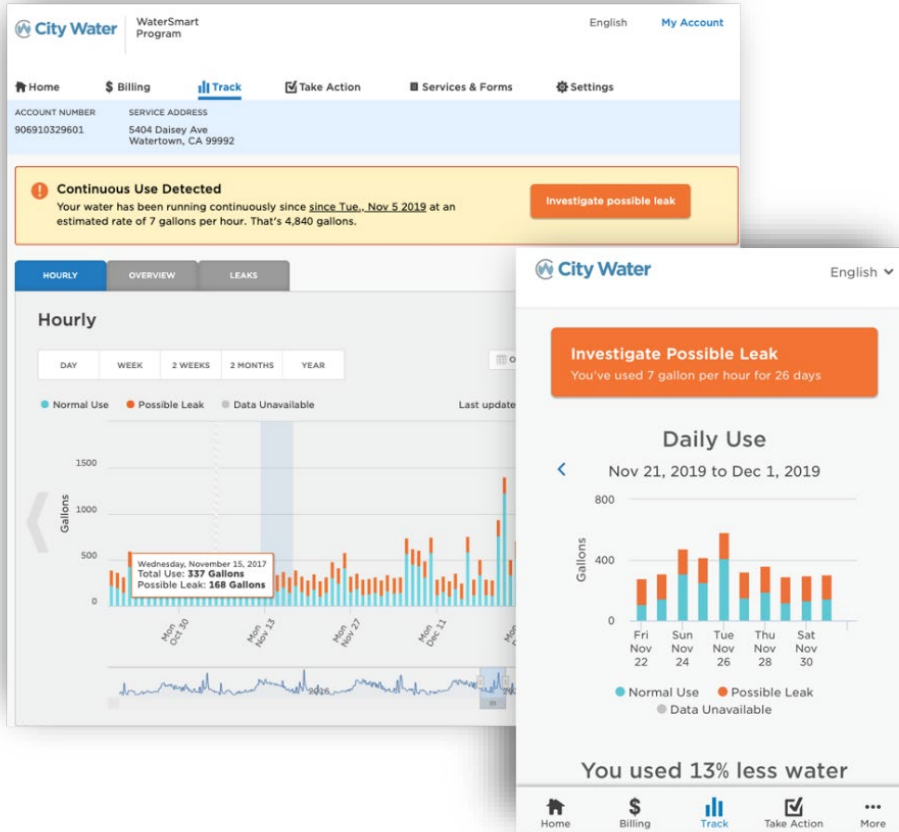
- **Contain graphs to visually communicate usage patterns and habits.**

Confirmed. Every **WaterSmart** Water Report contains personalized WaterScore graphs that compares the customer's water use, either to other customers that are like them (Social Comparison) or to their own use looking back over time (Historical Comparison). The utility can choose which comparison they choose to use in the Water Reports. An example of a Customer Water Use Report was provided earlier in this section.

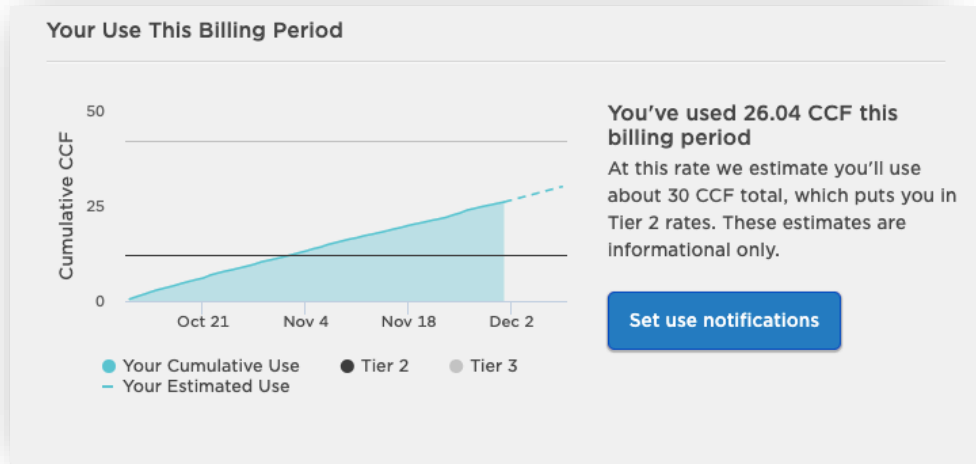
In the Customer Portal, the customer can see both their water use over time in the Historical Use Chart or their Social Comparison in the corresponding module on the Customer Portal home page.

Social comparisons are a comparison of each Single-Family Resident (SFR) account to other SFR accounts that are like them. To conduct social comparisons WaterSmart first sorts SFR accounts into cohorts, or groups of homes, with similar characteristics, such as the number of occupants and the irrigable area size. We then examine the most recent meter reading for all accounts within a cohort, excluding outliers, those users with very high or very low use, who most likely represent errors.

The average for each cohort is the median, or fiftieth percentile. An average customer is one who uses more than half of all the other accounts in the cohort. Efficient use represents the twentieth percentile—the bottom 20 percent of accounts in the cohort are considered efficient. The series of images provided below are examples of the various charts and graphs that are available in the customer portal.



Customer Portal “Track” Page on Web and Mobile



Bill Projection for Current Billing Period with Rate Tiers Identified



Example of WaterScore within the Customer Portal



- **Provide customers with the option to receive reports by mail or email.**

Confirmed. IRWD customers can customize their communication preferences 24x7 on the 'Communication Preferences' page of the Customer Portal. There is an option to update the Customer Water Use delivery method. This is communicated on the Report.

- **Emailed reports must be in a mobile friendly format.**

Confirmed. **WaterSmart's** emailed Customer Water Use Reports are compatible with both desktop and mobile viewing options.

- **All reports shall include input from IRWD and meet IRWD's approval.**

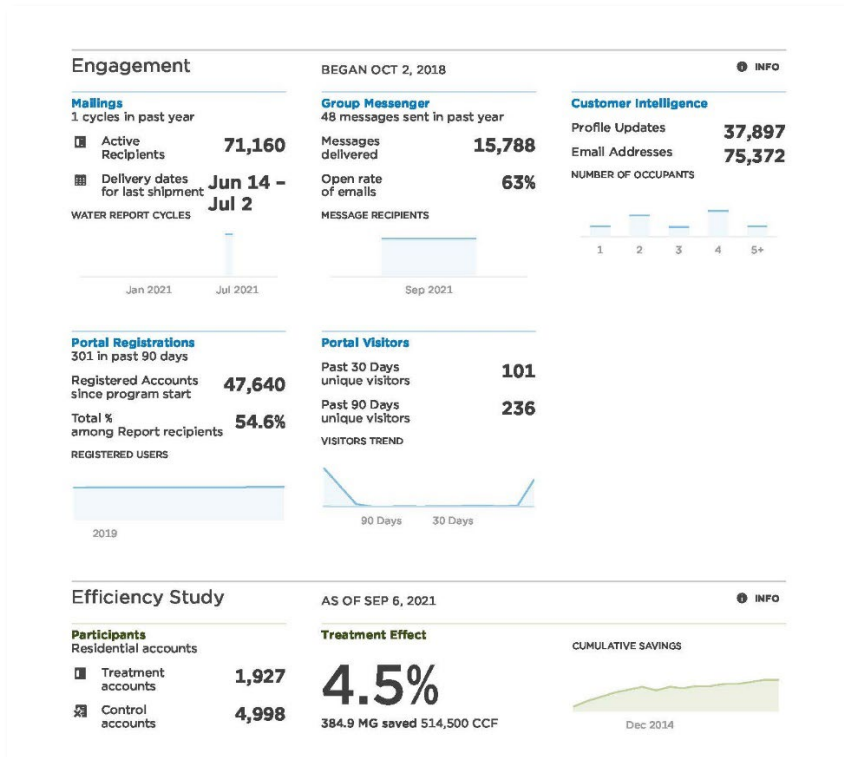
Confirmed. IRWD staff can provide feedback on the messages and recommendations as well as the type of comparisons that are provided to customers in the Water Reports sent to utility customers. Currently, IRWD can choose messages from the message library as well as provide content for one custom message. IRWD has also provided edits to their Recommendation library that can be revisited periodically, generally annually, as information changes.

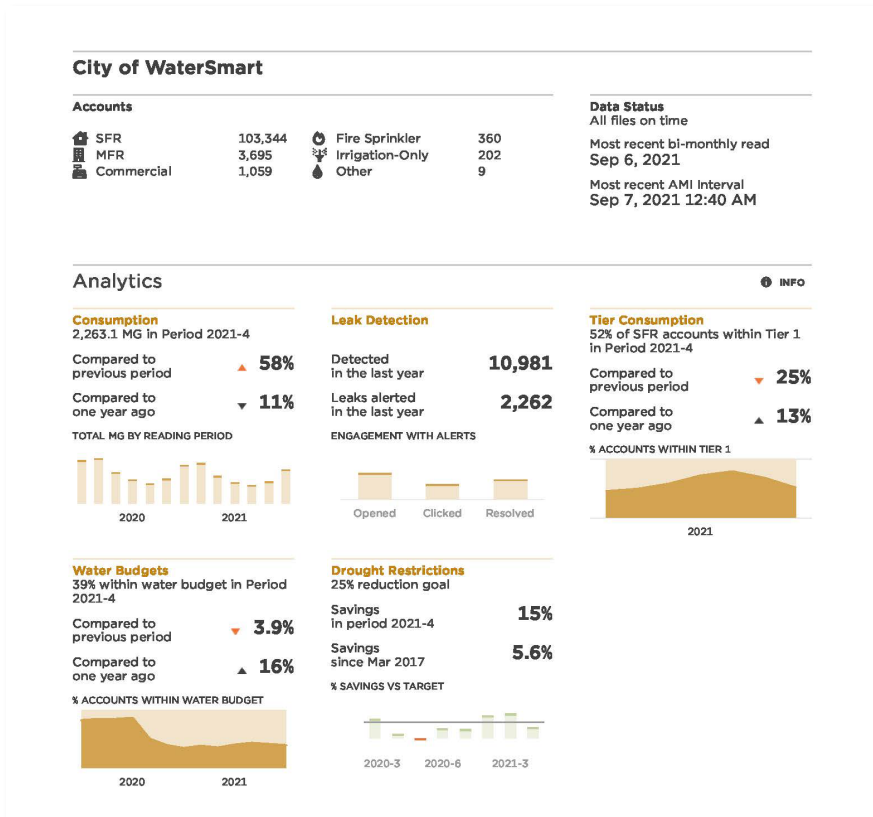
2.4 Utility Dashboard:

The Consultant shall customize an agency-facing web dashboard, which will provide IRWD staff with an understanding of the program metrics, progress, and results. The dashboard should be viewable only by IRWD and will at a minimum include the following features and functionality:

IRWD’s staff will receive access to the Utility Analytics Dashboard. The Utility Analytics Dashboard creates actionable insights from data and provides a communication platform to drive the IRWD’s conservation, engagement, and operational efficiency goals. The Dashboard is thoughtfully organized into modules where IRWD personnel are able to analyze consumption, anomalous use, meter data accuracy, user engagement and much more.

The **WaterSmart** Utility Analytics Dashboard offers utilities access to more than 50 configurable reports with current and historical data that support filtering, drill-down, with integrated mapping capabilities across time, customer class, and more. This data can be managed in the Dashboard or easily exported to Excel for further analysis with a single click. Montrose’s staff will be able to analyze and communicate with all accounts using the Dashboard. Below are some examples of the user experience within the Utility Dashboard.





Example of Home View within Utility Dashboard

- Ability for IRWD to manage authorized user permissions and account access.

Confirmed. IRWD will designate one or more staff as the site Administrator. The Administrator has the ability to provide password-protected access to staff with email addresses and grant Viewer or Editor privileges. The Administrator can revoke access to any IRWD employee at any time.

- Unlimited licenses for IRWD staff and the ability for a Utility administrator to provision or revoke access with viewer, editor, or administrator roles.

Confirmed. As part of WaterSmart’s Software-as-a-Service (SaaS) platform, employees and customers of IRWD will have unlimited licenses to use the **WaterSmart** solution during the term of the Agreement. IRWD will designate one or more staff as the site Administrator. The Administrator has the ability to provide password-protected access to staff with email addresses and grant Viewer or Editor privileges. The Administrator can revoke access to any IRWD employee at any time.

- **Ability to identify when customer makes changes to their profile.**

Confirmed. IRWD users who are granted Editor or Admin privileges will have the ability to update a customer profile. Customers can also update their Customer Profile and contact information through their **WaterSmart** Customer Portal. Both the Utility Analytics Dashboard and the Customer Portal have differing types of role-based access privileges that will be assigned to IRWD Staff, Managers, and Customers.

The SFR Customer Profiles Report is available for on-demand viewing and download from the IRWD **WaterSmart** Utility Dashboard:

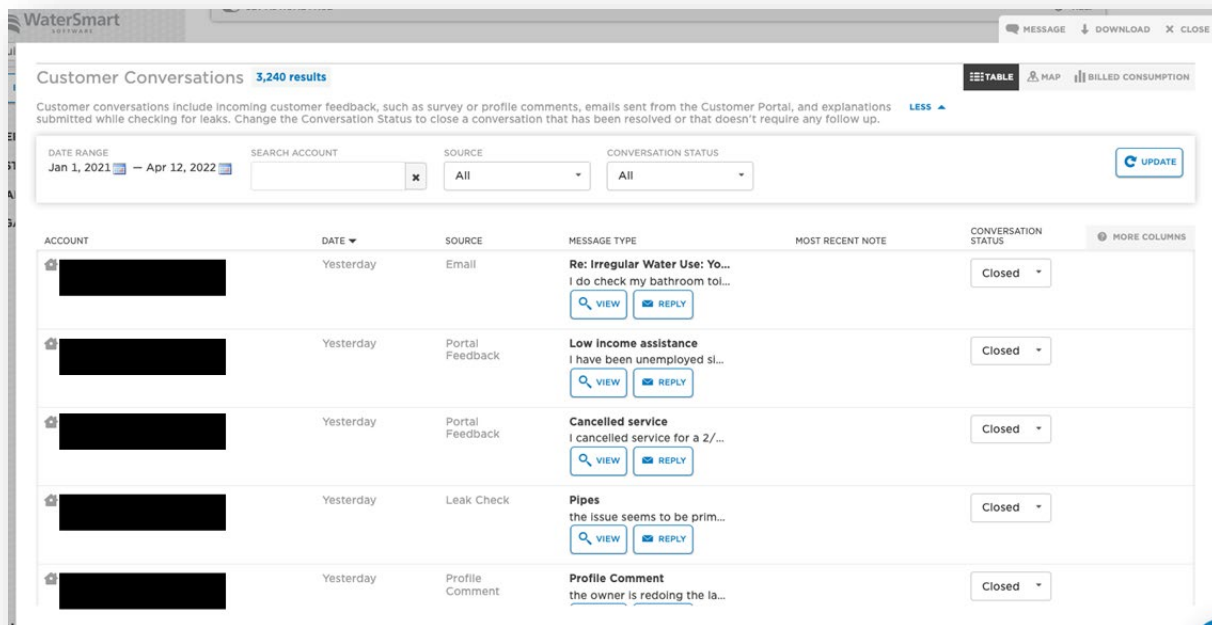
https://admin-irwd.watersmart.com/index.php/dashboard/dashboardIndex?report_id=109.

This report is a list of all active Single Family Residential accounts that can be filtered by fields in the customer profile, such as the number of occupants or the size of the irrigable area. All other profile fields are available by downloading this report.

- **Tracking of customer requests and inquiries.**

Confirmed. The Customer Conversations report allows IRWD staff to view, respond to and track customer requests and inquiries. Customer conversations include incoming customer feedback, such as survey or profile comments, emails sent from the Customer Portal, and explanations submitted while checking for leaks. IRWD staff may change the Conversation Status to close a conversation that has been resolved or that doesn't require any follow up.

A screenshot of the functionality and process flow is below.



Customer Conversations 3,240 results

Customer conversations include incoming customer feedback, such as survey or profile comments, emails sent from the Customer Portal, and explanations submitted while checking for leaks. Change the Conversation Status to close a conversation that has been resolved or that doesn't require any follow up.

DATE RANGE: Jan 1, 2021 - Apr 12, 2022

SEARCH ACCOUNT: []

SOURCE: All

CONVERSATION STATUS: All

[UPDATE]

ACCOUNT	DATE	SOURCE	MESSAGE TYPE	MOST RECENT NOTE	CONVERSATION STATUS
[REDACTED]	Yesterday	Email	Re: Irregular Water Use: Yo... I do check my bathroom to...		Closed
[REDACTED]	Yesterday	Portal Feedback	Low income assistance I have been unemployed si...		Closed
[REDACTED]	Yesterday	Portal Feedback	Cancelled service I cancelled service for a 2/...		Closed
[REDACTED]	Yesterday	Leak Check	Pipes the issue seems to be prim...		Closed
[REDACTED]	Yesterday	Profile Comment	Profile Comment the owner is redoing the la...		Closed

- The ability to store and display at least five (5) years (prefer more) of data for immediate real-time access in both the reporting engine and the customer presentment interface.

Confirmed. **VertexOne WaterSmart™** can store and display data for as many years as The IRWD provides; ten years is typical.

- Ability to export data in standard data presentment format (i.e., Excel).

Confirmed. The Utility Dashboard allows for one-click export of data into Excel files, which can be downloaded by The IRWD staff.

- Consumption analytics across all meters, regardless of meter type.

Confirmed. **VertexOne WaterSmart™** Utility Dashboard offers approximately 50 configurable analytics reports with current and historical consumption information that support filtering, drill-down, and mapping capabilities across time, customer class, and more. **VertexOne WaterSmart™** is meter-agnostic and works with data from all meter classes and types.

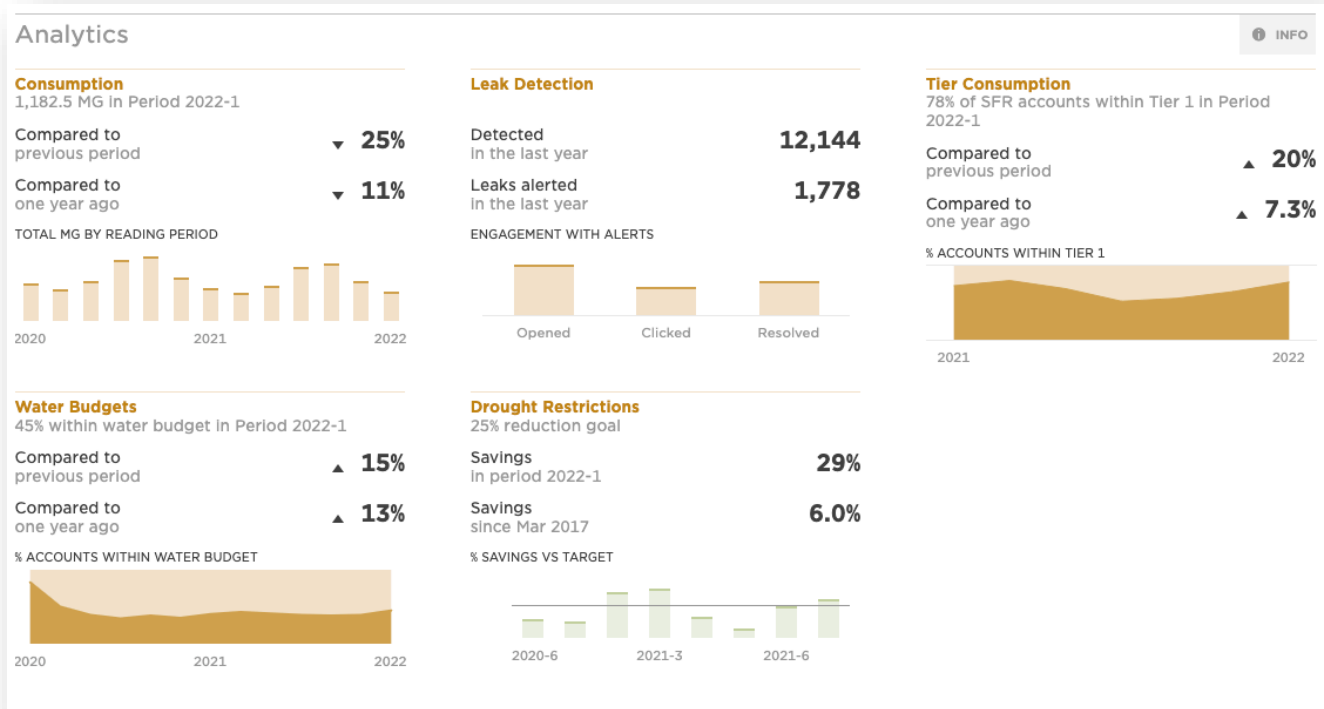
- Profiles for each account with the ability to search for a profile by partial or complete account number, meter number, customer name, address, or email address.

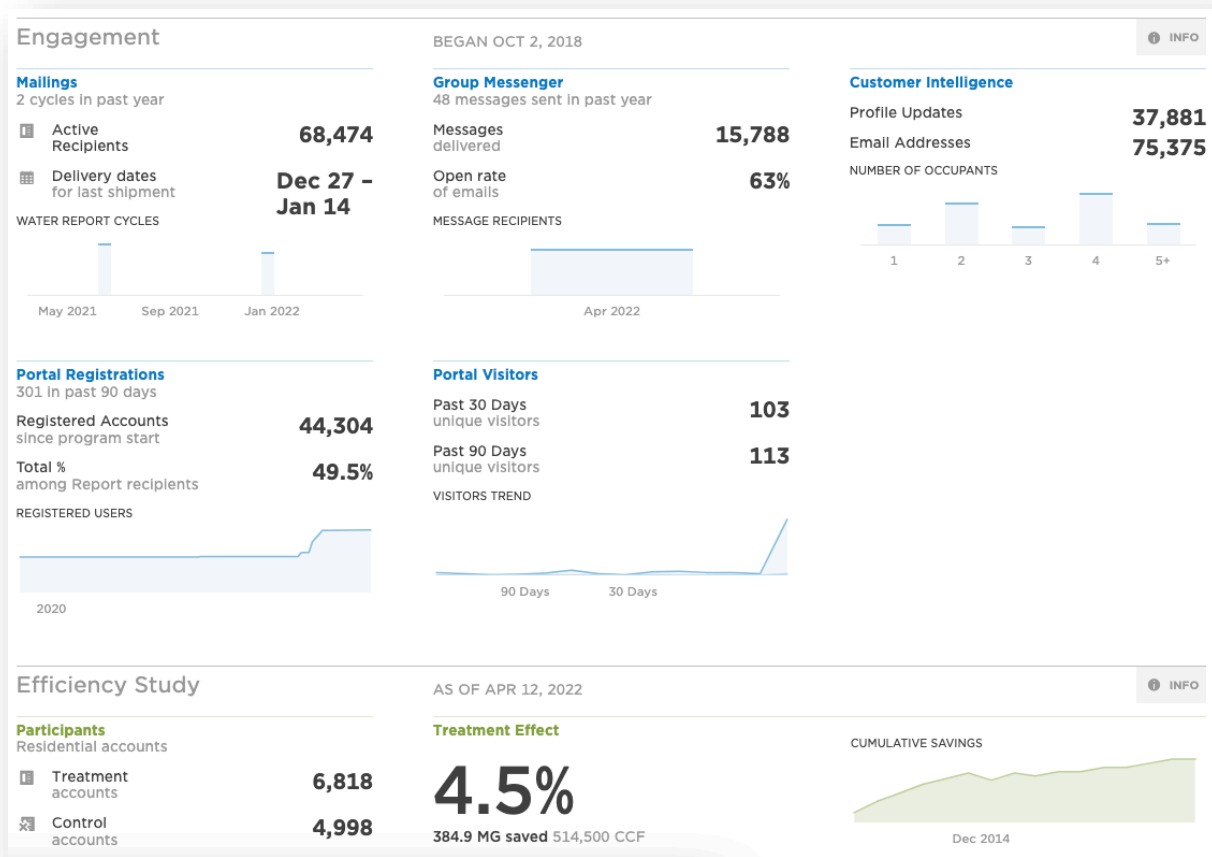
Confirmed. All these search criteria are met using the Search tool in the Utility Dashboard. **WaterSmart** has also extended the search feature to include names of modules and reports and Utility settings.

A Customer Details page exists for each account. These pages include all relevant customer information, Bill Explainer scripts, and deep water-use insights at the account level. They can easily be navigated to in the Utility Dashboard by searching for a customer’s name, service address, email, or account number.

- Data to be displayed in colorful, easy to understand charts and graphs with short sentences explaining the data.

Confirmed. **WaterSmart** utilizes contextual, easy-to-read charts and graphs to communicate important information, including but not limited to consumption metrics, engagement metrics, and conservation / water-saving metrics. Each of the modules below can be selected to understand the underlying detail for greater understanding and the ability to uncover actionable insights.





- Ability for customer usage analysis; including seasonal use analysis, temperature and precipitation information.

Confirmed. **WaterSmart** has many ways to analyze customer usage. **WaterSmart** provides the most commonly used reports across our customer base of 200+ utilities in the Dashboard Index for easy and quick analysis, including but not limited to the following topics:

Consumption

- Consumption History by Day
- Billed Consumption by Period
- Billed Consumption by Year
- Average Consumption by Period
- Irrigators (Last Week)
- Irrigators (Last Year)
- Top Consumers by Period



- Top Consumers by Year
- Top Changers
- Top SFR Consumers by Irrigable Area
- SFR Benchmarks by Period
- Reading Detail by Account
- Reading Detail Download by Period

Drought Restrictions

- Drought Restriction Target vs. Actual
- Drought Restriction Compliance
- Repeatedly Over Drought Restriction Goal
- Repeatedly Meets Drought Restriction Goal

Leak Detection

- Leaks
- Customer Conversations
- Suspect Meter Readings Summary
- Suspect Meter Readings Detail
- Customer-Initiated Leak Checks
- Leak History by Billing Year
- Leak History by Billing Period
- **Other Analytics**
- High Bills
- Suspect Bills

Tier Consumption

- Accounts by Rate Tier
- Consumption by Rate Tier
- Repeatedly in Highest Tier
- Currently In Highest Tier

Water Budgets

- Repeatedly Over Allocation

- **Ability to load the customer's view of their portal in impersonation mode.**

Confirmed. IRWD will have the ability to see exactly what the customer sees. The Customer Details Page is an account-level view to help IRWD representatives respond to customer inquiries by providing all relevant customer property and water use information, billing history, a complete history of notes, outbound communications, and customer actions, step-by-step personalized support for common questions around high bills, and much more. The CSR will also have a quick link to the account's portal, to be able to see exactly what the customer sees.

- **Ability to normalize usage data to gallons per day based on number of days in each billing period.**

Confirmed. Water use is currently presented to both the IRWD customer and utility staff in the number of gallons used per day (GPD) because it's the easiest unit for people to envision and provides the best measurement for comparison. WaterSmart does this by dividing the number of days in each billing period into the total billed consumption for each customer. Most recent total periodic consumption and historic GPD and total periodic consumption are also available to the utility and the customer in the Historic Use Chart on the customer record in the Utility Dashboard and on the Customer Portal. This information and analysis are based on the consumption and billing data provided to WaterSmart by the utility.

- **Produce web portal compatible with current versions of major web browsers (Internet Explorer, Edge, Chrome, Safari, Firefox etc.).**

Confirmed. The platform is compatible with Windows, iOS, and Android. **WaterSmart** currently supports personal computers, tablets, and smart phones through the following web browsers:

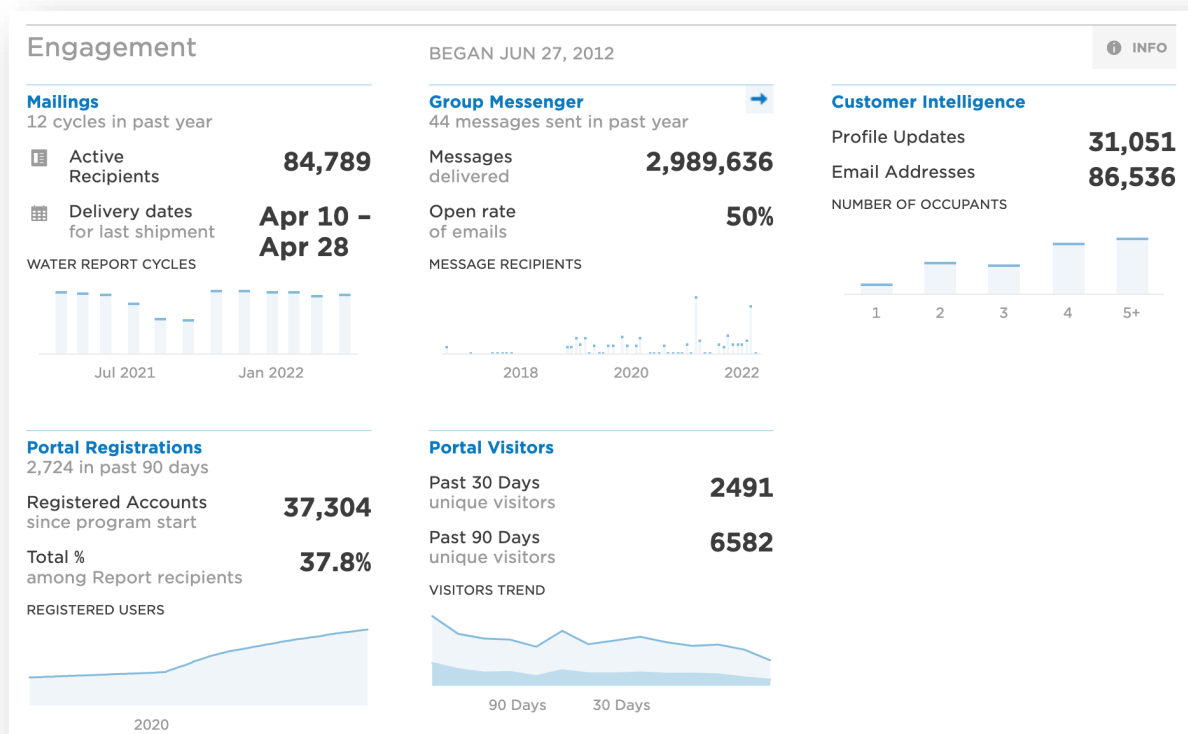
- Microsoft Edge 40+
- Chrome 70+
- Safari 11+
- Firefox 60+

- **Program analytics with recommendations for program participation improvement.**

Confirmed. Along with ample reporting and graphical program health monitoring options, a Customer Success Manager meets monthly with the IRWD team to discuss options to improve the program and grow value of the **WaterSmart** program. For additional information about the support the Customer Success Manager will provide IRWD, please refer to [Task 4: Program Management](#).

- Routine summary of program statistics with input from IRWD on key performance indicators.

Confirmed. A summary of the customer Engagement Analytics is available on the Utility Dashboard Overview page (see image below). In the Engagement modules of the Dashboard, the utility user has access to nearly real-time data on how customers are engaging with the **WaterSmart** Customer Portal and the pieces of engagement that are sent to them. These detail pages and the corresponding reports available in **WaterSmart** provides the utility with further detail and analysis of customer interaction, including the number of registered accounts, unique and total visits, email addresses and phone numbers captured, and actions taken by customers.

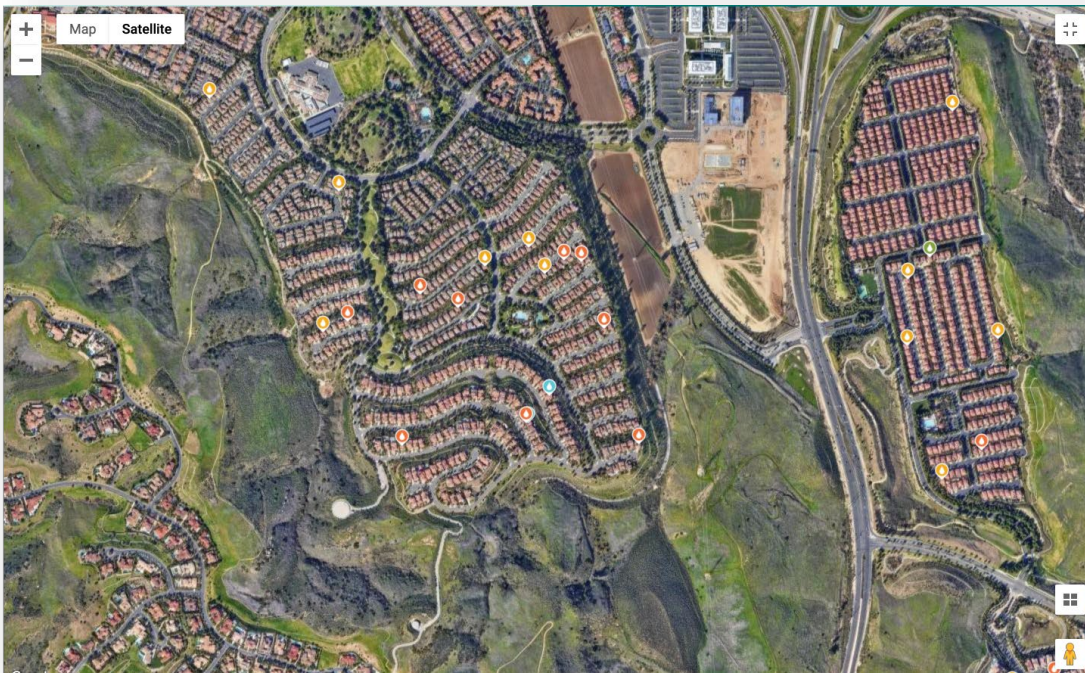


Utility Dashboard Home Page

Additionally, IRWD has been assigned a Customer Success Manager that will meet with the utility on a regular basis, the cadence to be determined. In those meetings, the utility and the WaterSmart Customer Success Manager will review requests, challenges, issues, and analytics - consumption or engagement - to provide insight and expert suggestions for the success of the **WaterSmart** platform.



- **Interactive map displaying residences. IRWD can provide meter GPS coordinates.**

Confirmed. WaterSmart utilizes an interactive map to allow for convenient analytics and for the creation of custom reports. Any report in **WaterSmart** that includes individual customer records can be viewed on a map. The map view is also available when viewing Lists in the **WaterSmart** Utility Dashboard. Lists are customized reports that represent a specific group of customers created by IRWD staff by copying and pasting account numbers, searching for and adding specific accounts, drawing a shape on a map, or using GIS shape maps to set geographic boundaries. The utility can create and update a List of accounts that need to be tracked and see the locations of those accounts in the Map View of the List Report in the Utility Dashboard (as shown below).



On the map view, the utility user can see the location of accounts, whether users are average, efficient, or high-water users. The map view is limited to 1,000 accounts and can be zoomed in to include a more limited geographic area and reveal more detail. Some of the features of the Map View include:

1. Moving map: User can move the map area being viewed by clicking and holding on the map until a hand appears and then moving the map in the frame to the desired area.

2. Map / Satellite toggles: The map view begins and defaults to Satellite view with an option to view the labels of local landmarks. User can change the view to a map view with the option to add terrain by clicking on the Map button.
3. Zoom (+/-): Allows User to zoom in or out on a specific area of the map allowing a more granular view of the area and the accounts found therein. As User zooms in on the map, individual accounts and smaller groups of accounts will be seen.
4. Full Screen View -  User can click on the Full Screen View button to expand the map to fill the monitor screen, allowing User to see a larger map area. Press Esc on the computer keyboard to return to the original report review.
5. Pegman Street View Icon -  User can click on the pegman icon and drags it on to the map, User will see a street view of the map. Click on the left-pointing arrow in the top-left corner of the screen to return to the previous map view.

The map is a third-party application and cannot be updated or altered by WaterSmart support or product teams.

- **Interactive map module with meters and data collection points.**

Please refer to the previous response.

- **Ability to add identifiers to meter locations on interactive map module.**

Please refer to the previous response.

- **Interactive geographical display of rebate participation with the ability to track program participation with filtering capability.**

Confirmed. IRWD staff can view the participants in rebate programs by taking advantage of the Program Participation report feature in **WaterSmart**.

Between 2012 - 2018 IRWD provided WaterSmart updates on available rebate program participants. The programs that were tracked included:

- Clothes Washer
- Dual-Flush Toilet
- Google
- High Efficiency Clothes Washer
- High Efficiency Toilet
- LakeForest-Large-Higher
- Lake-Forest-Large-Lower
- Large Landscape Weather-Based Irrigation Controller
- Moisture Sensor
- Plumbing Flow Control
- Rain Barrel
- Residential Audit

- Residential Home Water Audit
- Rotating Nozzle Program
- Toilet Replacement
- Turf Removal
- Ultra Low Flush Toilet
- **WaterSmart** Report
- Weather-based Irrigation Controller
- ZWU

As part of the continuing program design, we can reactivate the loaders for the program participation files and IRWD can begin sending data report updates to provide the participating accounts in rebate programs. Using the Program Participation Report in **WaterSmart** (see below), the utility user can see the participating accounts in a table view, by billed consumption, or on a map, providing geographical location.

- **Provide an interactive map-based element in the web portal with analytical functionality.**

Confirmed. Please refer to previous responses.

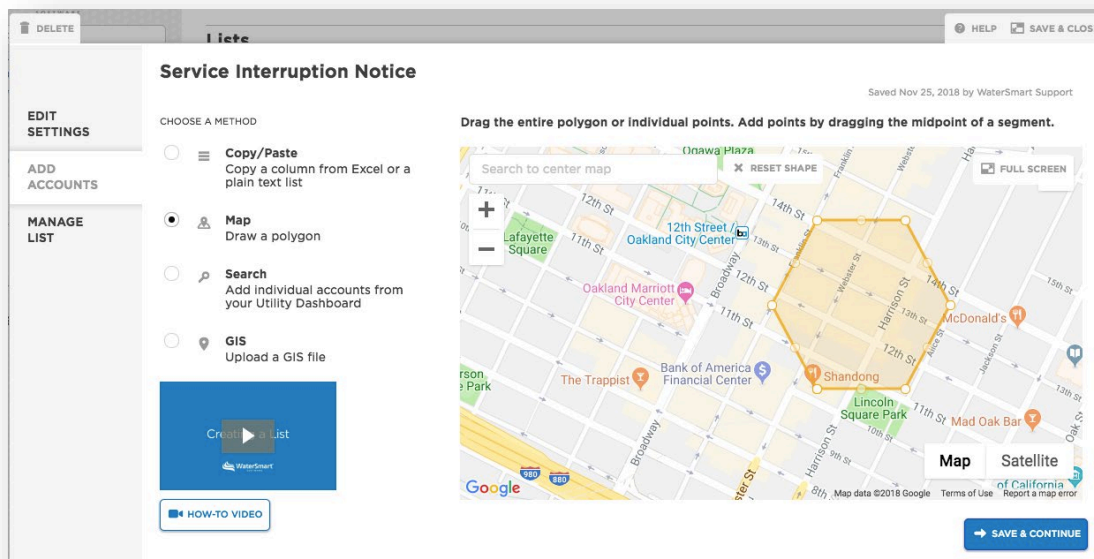
2.5 Utility Reports, Modules and Analytics:

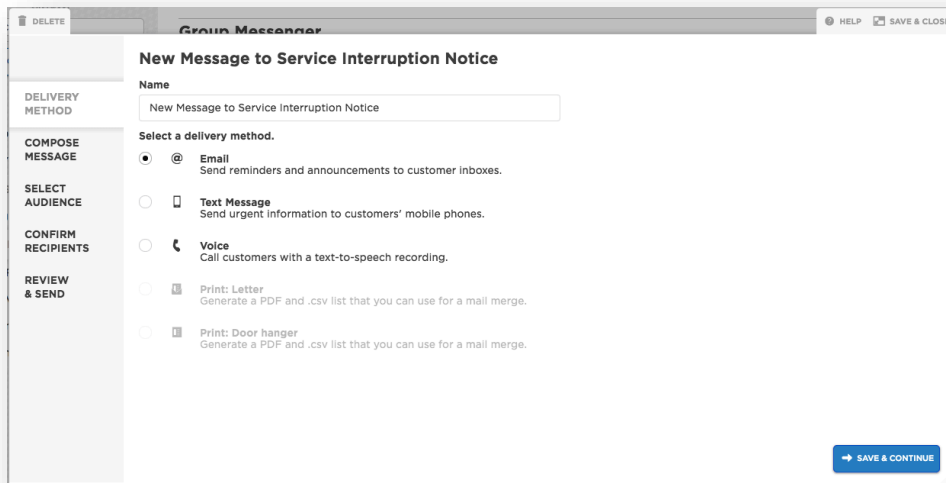
- **Ability to create reports.**

Confirmed. There are approximately 50 configurable reports with current and historical data that support filtering, drill-down, and mapping capabilities across time, customer class, and more.

The Utility Analytics Dashboard is also a communication engine. It provides the ability to send and re-send individual communications to customers and makes this easy through a multitude of templates with personalization variables for the customer.

In addition to the 50+ most common reports used across WaterSmart's 200+ utility customers, IRWD staff has the option to create custom reports to keep track of program-specific interests over time.





List Builder and Group Messenger within Utility Dashboard

- Reports and maps showing highest and most excessive water consumers by meter class or by water budget (prefer this option) and by the bill period with the ability to download consumption into Microsoft Excel for further analysis.

Confirmed. Please refer to the earlier response in this section for information on reporting.

All reports are downloadable to Excel format or CSV format for further analysis, such as sorting by meter class.

Should additional reporting functionality be requested, such as adding water budget detail fields, IRWD can take advantage of the development hourly rates to build enhanced custom reports at additional cost.

- Reports on customer portal use and customer profile statistics, including frequency of portal use, most popular actions taken by customers, method of visit (mobile vs desktop).

Confirmed. Through the Utility Dashboard, IRWD staff are able to monitor Customer Portal activity including Portal Registration Rate by Source (e.g., mail vs. email), Portal Visit Frequency, Customer Profile Updates, Program Participation, Customer Feedback, and acquired Email Addresses. These analytics also provide Utility staff with insights about customer home profiles, water use patterns, and water-saving actions.

- **Leak detection module that detects and defines types of leak events with thresholds that can be configured by IRWD staff.**

Confirmed. WaterSmart will work with IRWD to configure thresholds for leak events as defined by meter class, number of gallons per hour, and number of hours of continuous use. The Leak Module shows all leak events in a selectable time period with summary statistics, such as start date/time, volume, rate, ongoing/stopped status, whether the customer was notified, what actions a customer has taken, and any staff interactions with the customer. The Leak Module from **WaterSmart** is the most robust and widely used module of this kind in the industry. IRWD staff can easily refer back to their current leak parameter settings in the Leak Settings section of the Leaks Module at any time. If they wish to adjust these settings at any point, the WaterSmart Customer Success Manager can help to do so.

Further detail on leak alerts has been provided in [Section 2.2 Custom Alerts](#).

- **Leak status report that provides an estimate of leak start date, duration of leak, volume of water lost during leak, whether customer has been notified, what actions the customer has taken to resolve, and information on the resolution.**

Confirmed. For all accounts, the statistics at the top of the Leak Detection Module show how many accounts have potential leaks, how many have received automated alerts, and whether they are clicking on the Email Leak Alerts and using the Leak Diagnosis and Investigation wizard to resolve their leaks.

Further detail on this functionality has been provided in [Section 2.2 Custom Alerts](#).

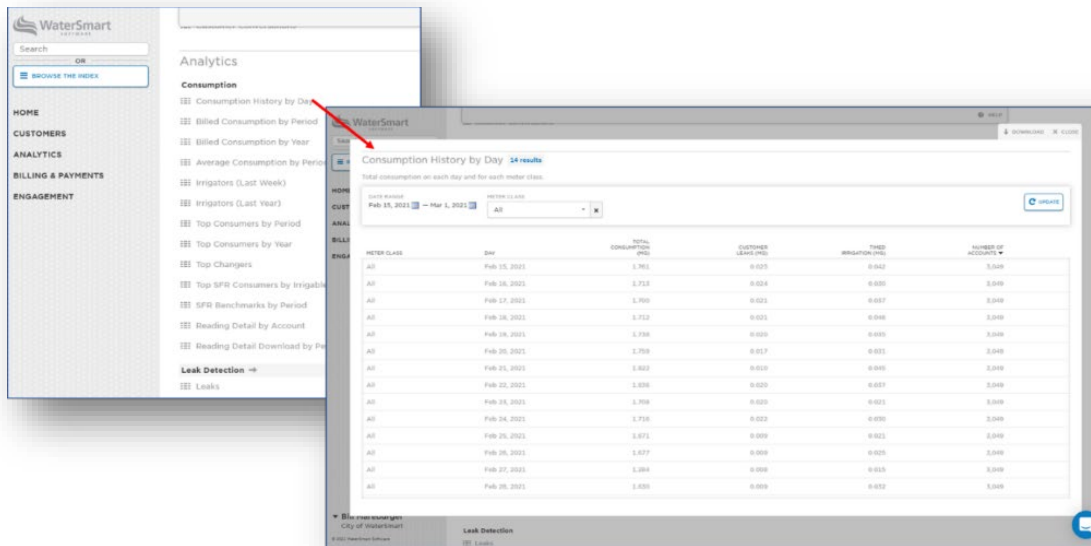
- **Top over budget water usage consumers per billing period and other reports.**

Confirmed. Specifically, WaterSmart has a Repeatedly Over Allocation report that details the accounts whose consumption has been over water budget for the selected number of periods in the last year.

Please refer to previous responses within this section for other reporting functionality.

- **Ability for IRWD to easily export data into excel or as a csv file.**

Confirmed. Consumption data can be exported into Excel. Consumption data can also be easily exported to CSV with a single click. Below is an example of the export functionality within WaterSmart.



- Ability to create customer groups based on multiple user profile and account attributes (i.e., age of property, number of people, cooling towers, master valves, flow sensors, and prior program participation).

Confirmed. Using **WaterSmart** Analytics Reports and the Lists feature in **WaterSmart**, IRWD staff can track customers with different characteristics as a group of accounts. Most reports and Lists can be downloaded to a .csv file to include two years of billed consumption for further analysis or targeting of customers with similar characteristics.

The Analytics Reports in **WaterSmart** often will be a resource for identifying groups of customers with specific characteristics. For instance, the SFR Customer Profile report provides a list of the customers who have updated their customer profile and the characteristics of all single-family resident accounts (e.g., number of residents, property age, indoor and outdoor features and fixture updates). There are other reports about Program Participation High-Use, Irrigation, New Accounts, and email and phone number acquisition.

After downloading the reports and further analysis, the account numbers can represent members of a group can be loaded into a **WaterSmart** List to track those customers and their water-use as a group. Like any other report in **WaterSmart**, the group can be viewed as a Table, by Billed Consumption, or on a Map View.

- **Ability to view every customer's web application and account.**

Confirmed. **WaterSmart** allows IRWD staff to search and drill into every customer's web application and account, from both the Utility Dashboard view and the Customer (impersonation mode) view.

- **Per site analysis (number of employees, residents, etc.)**

Confirmed. **WaterSmart** allows for Customers and IRWD staff to include per-site analysis data in the **WaterSmart** Customer profile on each Customer's account. **WaterSmart** currently has data live and collected for these fields. For accounts that do not currently have this information, the Customer profile can be updated by the Customer or by IRWD staff and saved.

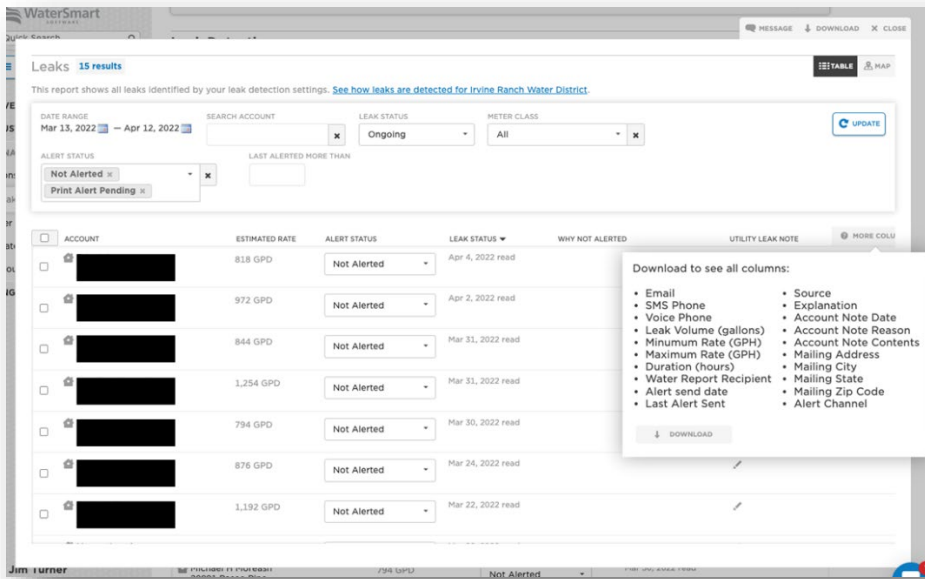
Current field groups include, but are not limited to:

- Account Info
- Household
- Outdoor
- Indoor
- Special Circumstances
- Property Info
- Primary Account Preferences: April Showers
- Portal User information

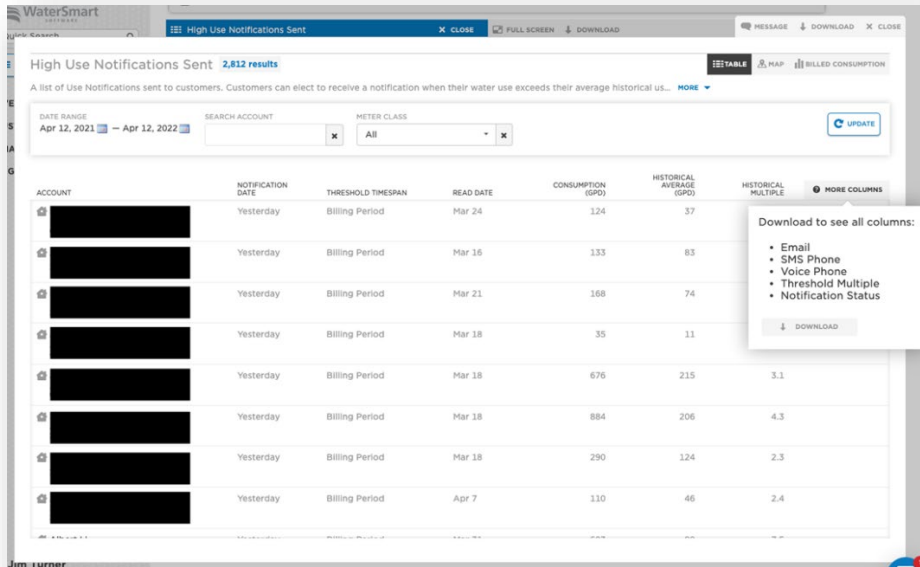
- **Ability to quantify alerts sent and type of alerts sent.**

Confirmed. In the **WaterSmart** dashboard, there are summary modules and analytics reports that will allow IRWD staff to track the quantity, type, and channels of alerts, Group Messages, and other engagement sent to the customer by WaterSmart. These include:

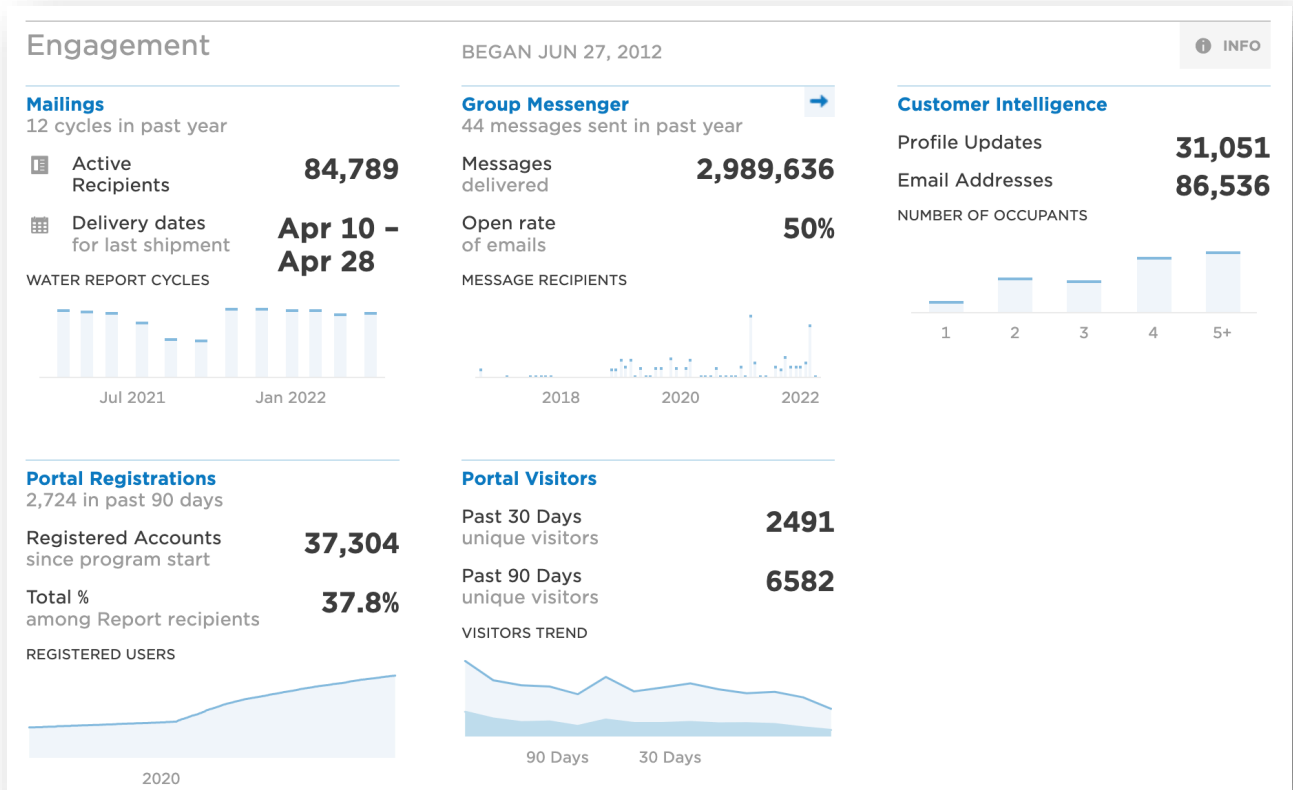
- Leak Analytics Module and Leak report - By filtering, viewing, and downloading the Leaks Report in the Leak Analytics module (shown below), the utility user can see a list of all leak alerts that were sent out, when, and by what channel - email, voice, text, print, or some combination. Utility staff can also see the status of the alert and if the customer has started to investigate and resolve the leak through the **WaterSmart** Leak Resolution Module, accessible through links in the Leak Report and via the **WaterSmart** Customer Portal.



- High Use Notifications Sent Analytics report - Customers can sign up to receive High Use Notifications triggered by thresholds that they set when they sign up for them. By filtering, viewing and downloading the High Use Notifications Sent report in **WaterSmart**, the utility user can see when High Use Notifications are sent as well as the status of that notification - whether it has been opened or clicked.



- Engagement Analytics modules - Mailings and Group Messenger - and accompanying analytics reports - There are other pieces of engagement that sent by the utility to the customer. Through the Engagement Analytics modules on the Overview page and the Engagement Analytics details and corresponding Analytics Reports, the utility user can track all outbound engagement sent through **WaterSmart**.
-



Group Messenger

[+ NEW MESSAGE](#)
[+ ADD TEMPLATE](#)

Delivery Methods Limited
[Contact us to enable Text and Voice messaging.](#)
[DISMISS](#)

Scheduled & Sent Group Messages **135 results** [FULL SCREEN](#) [DOWNLOAD](#)

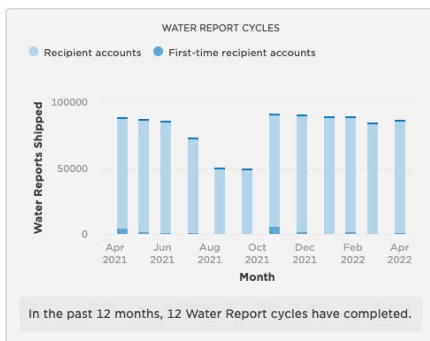
Click any message for more information. "STOP" will cancel any scheduled but unsent messages.

DELIVERY METHOD	NAME	REPLY TO	LAST UPDATED BY	RECIPIENTS	DELIVERY DATES	DELIVERY SUCCESS	URGENT MESSAGE
Email	LTU - Wave 13	[REDACTED]	[REDACTED]	564 sent	Apr 4, 2022	100% delivered 70% opened 3% clicked	Non-Urgent
Email	Rachlo Work...	[REDACTED]	[REDACTED]	75,932 sent	Mar 23, 2022	100% delivered 64% opened 1% clicked	Non-Urgent
Email	PA Messagin...	[REDACTED]	[REDACTED]	75,340 sent	Mar 22, 2022	99% delivered 62% opened 1% clicked	Non-Urgent
Email	Sweepstakes...	[REDACTED]	[REDACTED]	75,827 sent	Mar 14, 2022	100% delivered 63% opened 3% clicked	Non-Urgent
Email	LTU - Wave 12	[REDACTED]	[REDACTED]	3,739 sent	Mar 11, 2022	100% delivered 67% opened 3% clicked	Non-Urgent

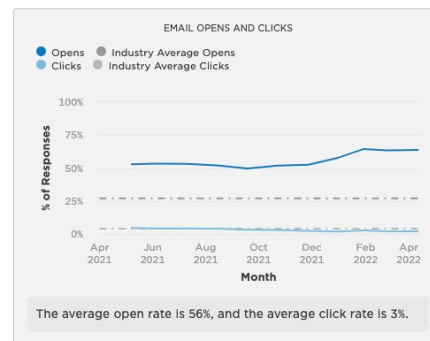
Draft Group Messages **16 results** [FULL SCREEN](#) [DOWNLOAD](#)

DELIVERY METHOD	NAME	LAST UPDATED BY	RECIPIENTS
Email	12/28 Rain Event	[REDACTED]	77,306
Email	New Message to Cust...	[REDACTED]	94
Email	LTU - Wave 9	[REDACTED]	0

Mailing Cycles



Response Rate



Reports

- ☰ Water Report Recipient Accounts
- ☰ Mailing History
- ☰ One-Time Mailing Recipient Accounts
- ☰ Excluded Mailing Recipient Accounts
- ☰ Inactives, Unsubscribes and Bounced Emails

- Ability to track active accounts, non-active accounts, registered users, non-reporting, meters, negative reads, and active with zero water use.

Confirmed. **WaterSmart** has reports that track and report specifically on all of the listed requirements.

- Routine summary of program statistics.

Confirmed. Please see earlier response in this section to this requirement.

- Ability to quantify alerts sent and type of alerts sent.

Confirmed. Please see earlier response in this section to this requirement.

- Ability to track active accounts, non-active accounts, registered users, non-reporting, meters, negative reads, and active with zero water use.

Confirmed. Please see earlier response in this section to this requirement.

Task 3: Training:

The selected Consultant shall provide, at a minimum, four training sessions on the program's web application functions and data analytics for IRWD. The minimum training requirements are listed below:

The assigned WaterSmart Customer Success Manager will provide IRWD with four (4) refresher training sessions and resources to ensure that staff understands the features and functionality of the **WaterSmart** Customer Portal and Utility Analytics Dashboard.

Training will be conducted online and can be completed within a single day or as multiple sessions over multiple days. On-site training is available as a premium option and can be conducted over two consecutive days. The refresher training includes:

- **Introduction to all customer facing elements** includes the Portal, alerts, mobile interface, the Marketing Kit, and more.
- **Detailed Customer Success functionality:** how to use Utility Analytics Dashboard to respond to customer questions (**WaterSmart** related or not), track customer interactions, provide customer support with technical issues related to the **WaterSmart** program, send emails, and more
- **Analytics training:** review of analytics available, how to access information, how to evaluate programs, and more.

Other premium training options that are available include:

- **Brief program information session:** for members of your staff who may need to speak about the **WaterSmart** program or be aware of the program goals and tools available but may not need to use the platform on a regular basis, the Customer Success Manager can provide a shorter 45 – 60-minute-long informational session about the program and products, including the Customer Portal and Utility Analytics Dashboard.
- **“Train-the-Trainer” Session:** WaterSmart offers a “train-the-trainer” model where WaterSmart staff trains Utility staff to conduct ongoing training for their colleagues throughout the year. This option gives Utility staff the information and materials necessary to train their colleagues where and when necessary, throughout the program.

The proposal will include a training plan to orient IRWD staff to the utility dashboard, customer web-facing application and other portal features and reports.

Ongoing Training and Support Plan and Resources:

In addition to the refresher training available to IRWD at the start of the program renewal, WaterSmart provides several tools to assist staff seeking to understand and maximize their **WaterSmart** experience:

- The **WaterSmart** Support Site and User Forum, which is accessible by all IRWD staff 24/7, includes responses to Frequently Asked Questions as well as common troubleshooting topics, how-to videos and other customer support-oriented content.
- The “Help” feature within the Utility Analytics Dashboard provides context-sensitive information to support customer service representatives' understanding of what they see on the screen and links to the Support Site with topics apropos to what the user is viewing.
- A messaging system allows the IRWD staff to ask questions and receive a response within the hour. Available 7 a.m. to 6 p.m. Pacific Monday through Friday, excluding federal holidays.
- Open Online training sessions are provided twice monthly:
 - 45-minute topical training that cover specific **WaterSmart** topics and functionalities with the goal to provide deeper understanding of a specific feature or use case (2nd Thursday of each month, January thru October)
 - 2-hour full training sessions, rotating every other month between the Customer Service and Analytics training sessions (3rd or 4th Thursday of each month)
- Product Webinars provide the latest **WaterSmart** news including product releases, case studies, and a forum to interact with other customers.

• **IRWD requests for assistance will be acknowledged in less than 24 hours. Contractor will have issue resolved or temporary remedy in place within 48 hours unless it is an emergency that needs immediate attention.**

Confirmed. IRWD staff can report issues to the WaterSmart support team through the Intercom messaging system, available from the Utility Dashboard. Since the 4th quarter of 2018, the average initial response time to support requests has been 11.2 minutes and the average time to complete resolution of reported issues is 2.7 hours. The response and resolution rates have improved significantly over the last year.

The majority of the reported issues can be resolved on the same day or within 48 hours. If the issue cannot be resolved in that time, WaterSmart will work with utility to work through the issue. Updates are provided on open issues by the WaterSmart support team in a regular and timely fashion until the issue is resolved.

• **The selected Consultant shall provide, at a minimum, four training sessions on the program's web application functions and data analytics for IRWD.**

Confirmed. Please refer to response provided earlier in this section.

Task 4: Program Management:

Consultant shall coordinate with IRWD to provide regular project status and updates. The Consultant shall facilitate meetings and workshops as needed. The minimum program management requirements are listed below:

The WaterSmart Customer Success Manager can provide IRWD with project status report updates as needed.

- **Designate an individual to serve as Project Manager.**

Confirmed. WaterSmart is committed to excellent customer service. We provide personal service from one of our Customer Success Managers when you need it, and a web-based self-service Support Site when you don't. Each utility is assigned a dedicated Customer Success Manager, a secondary manager, and an engineer, all of whom manage the project from the onboarding process through the lifetime of the program.

Staff go above and beyond what is required to ensure satisfaction, as the Customer Success Manager is not only the direct contact at WaterSmart but is also an advocate within the WaterSmart team. The Customer Success team also works together so there is always someone available to tend to the needs of the IRWD in the event that the designated manager is not available. WaterSmart prides ourselves on understanding our utility partners' goals and challenges, and maintaining a relationship with customers that is positive, helpful and friendly.

- **Designate an individual who will be IRWD's contact person for future issues and assistance.**

Confirmed. The IRWD will have a dedicated Customer Success Manager that will support the IRWD's program throughout its implementation, launch, and lifetime to answer questions, provide updates, support complex tasks, share new feature updates, and provide additional training as needed. The WaterSmart Customer Success Manager is available by telephone and email. The WaterSmart Customer Success Manager will conduct quarterly check-in meetings to track performance relative to the IRWD's objectives and adjust as necessary, provide implementation support, review best practices, support outreach efforts, gather feedback and answer any questions. The WaterSmart Support Site is also accessible by all the IRWD staff. This site includes responses to Frequently Asked Questions as well as common troubleshooting topics, how-to videos, and other customer support-oriented content. The Live Chat feature allows the IRWD staff to ask questions about data, get help with challenging customer

questions, provide product feedback and more. Users can typically expect to receive a response within the hour. Chat is available between the hours of 8 a.m. and 8 p.m. Central Time, Monday thru Friday, excluding federal holidays.

- **Kick-off meeting, goal setting, and program design meetings.**

IRWD has been a WaterSmart service subscriber for 10-years, since 2012.

In addition to the regular check-in meetings with the assigned Customer Success Manager and the annual performance review, available upon request, the Customer Success Manager will meet and work with the utility at the beginning of each performance year to review the program goals and revisit the design of the program based on those goals and changing conditions to provide the utility and water customers with a platform that will successfully meet their needs.

- **Coordination with IRWD for review and approval of data transfer and security, content, marketing, and web application design.**

Confirmed. The WaterSmart designated customer success manager will work with IRWD's designated project manager during set-up and throughout the duration of our agreement to make sure that platform features are set up in a way that best serves IRWD's needs.

- **Familiarity with Oracle Customer Care and Billing system and Paymentus.**

Confirmed. WaterSmart has experience integrating with over **35 different CIS platforms including more than 20 clients who leverage Oracle CIS**. And, WaterSmart has been receiving and ingesting reports from the IRWD Oracle-based CIS system for ten years with little to no issues.

WaterSmart has successfully completed 18 single sign-on and embedded payment integrations with Paymentus. WaterSmart has a great deal of familiarity and experience implementing payment integrations with Paymentus and undergoes a thorough User Acceptance Testing process for all payment processor integrations. Since 2019, there has been a Paymentus Single Sign-On in place that provides IRWD customers seamless transfer from the **WaterSmart** Customer Portal to their Paymentus customer portal where they can view their bill, manage payment options, and pay their bill.

- **Ability to develop a process flow in which updates are made as IRWD makes system updates.**

Confirmed. IRWD's assigned Customer Success Manager will be available to work with the assigned utility Program Manager and IT staff to effectuate any updates to the required data reports necessitated

by any utility system updates. If there are updates that need to be made to the back-end data loaders or updates to the system configuration, there will be an additional development fee assessed. An estimate of the required work to update the configuration will be provided and a signed work order must be provided to do the development work to update the **WaterSmart** back-end configuration.

- **IRWD requests for assistance will be acknowledged in less than 24 hours. Contractor will have issue resolved within 48 hours unless it is an emergency in which case a temporary remedy and/or customer notification must be put into place immediately (i.e., users cannot login).**

Confirmed. IRWD staff can report issues to the WaterSmart support team through the Intercom messaging system, available from the Utility Dashboard. Since the 4th quarter of 2018, the average initial response time to support requests has been 11.2 minutes and the average time to complete resolution of reported issues is 2.7 hours. The response and resolution rates have improved significantly over the last year.

The majority of the reported issues can be resolved in the same day or within 48 hours. If the issue cannot be resolved in that time, WaterSmart will work with utility to work around the issue. Updates are provided on open issues by the WaterSmart support team in a regular and timely fashion until the issue is resolved.

- **Monthly meeting and/or conference call to review report content and ability to request additional customized messaging, and revisions to existing messages in the library.**

Confirmed. The WaterSmart CS Manager can provide IRWD with project status report updates monthly.

- **Monthly invoicing and project status reports.**

Confirmed. Please refer to previous response.

- **Quarterly program progress review.**

Confirmed. The WaterSmart CS Manager will conduct quarterly check-in meetings to track performance relative to IRWD's objectives and adjust as necessary. Regular check-ins allow for IRWD and their Customer Success Manager to discuss the status of the program, any product enhancements, and anything else the CVWD wishes to discuss.

- **Annual Performance Reports.**

Confirmed. At the conclusion of each year, and upon request, a draft report analyzing the water savings, customer engagement, and recommendations on how to improve program participation and effectiveness shall be provided to IRWD for review and comment. IRWD's comments shall be incorporated into the

final program reports for each of the five years of the program term. If IRWD chooses a third party to evaluate the performance of the program, the Consultant shall provide all necessary information to that third party to facilitate the verification of results. *Further details on program performance have been provided in the following section [Task 5: Program Evaluation](#).*



Task 5: Program Evaluation:

Provide detailed information on how the Program performance will be measured and verified. Relevant details include the methodology for the evaluation, measurement, and verification of water savings attributable to the Program, and the information/specific metrics that will be available to IRWD (as related to water savings, customer satisfaction, cost effectiveness, program participation, staff efficiency, etc.), time frames for availability and frequency of reporting, and information on staff experience and expertise as it relates to program measurement and verification.

Measurement and verification are a core element of the WaterSmart program, allowing us to quantitatively assess the impact of the program independent of other factors at the Utility or regional level that may impact consumption and customer satisfaction.

WaterSmart reports changes in consumption for the experimental group versus a randomized control group selected from the population of eligible residential Water Report recipient households. The treatment group receives Water Reports and has access to the Customer Portal, while the control group (typically 2,500 –5,000 customers) does not. WaterSmart prepares an efficiency study that details the change in water usage over time for the treatment versus control group and loads those results into the utility dashboard. This is performed with a Fixed-Effects regression model using the consumption data for each household in the experimental and control groups. Discrete period savings coefficients are output from the model for every month in the evaluation period. Savings are then applied on a monthly basis using the control group mean GPD for the post-period, and the percentages of savings for that period. Results are visible in percentage terms and Acre Feet on a monthly basis at both the discrete and cumulative levels for the entire recipient group. The efficiency study report will include percentage savings, GPD savings, and Acre Foot savings at the program level for each month after the first complete Water Report cycle.

WaterSmart would be pleased to work with IRWD and a third party on the verification of the results of the program. In addition to providing all necessary information to the third-party verifier of IRWD's choice, WaterSmart would be happy to recommend possible third-party verifiers or help prepare materials to apply for outside funding to cover the costs of the third-party verification study.

- **At the conclusion of each year, a draft report analyzing the water savings, customer engagement, and recommendations on how to improve program participation and effectiveness shall be provided to IRWD for review and comment. IRWD's comments shall be incorporated into the final program reports for each of the five years of the program term. If IRWD chooses a third party to evaluate the performance of the program, the Consultant shall provide all necessary information to that third party to facilitate the verification of results.**

Confirmed. WaterSmart agrees to this requirement and will suggest additional KPIs to include in the annual reports to add insight and value to the program review process.

At the conclusion of each year, and upon request, a draft report analyzing the water savings, customer engagement, and recommendations on how to improve program participation and effectiveness shall be provided to IRWD for review and comment. IRWD's comments shall be incorporated into the final program reports for each of the five years of the program term. If IRWD chooses a third party to evaluate the performance of the program, the Consultant shall provide all necessary information to that third party to facilitate the verification of results.

2. TEAM:

Descriptions of the specific experience and capabilities of the designated project manager, project engineers, and support staff related to the previously outlined scope of work. Include a schedule showing the percentage of time each member will contribute to the project. Key personnel, as defined by IRWD, assigned to the project shall not be reassigned without the prior written approval from IRWD.

WaterSmart is committed to excellent customer service. We provide personal service from one of our Customer Success Managers when you need it, and a web-based self-service Support Site when you don't. Each utility is assigned a dedicated Customer Success Manager, a secondary manager, and an engineer, all of whom manage the project from the onboarding process through the lifetime of the program.

Staff go above and beyond what is required to ensure satisfaction, as the Customer Success Manager is not only the direct contact at WaterSmart, but is also an advocate within the WaterSmart team. The Customer Success team also works together so there is always someone available to tend to the needs of the IRWD in the event that the designated manager is not available. WaterSmart prides ourselves on understanding our utility partners' goals and challenges, and maintaining a relationship with customers that is positive, helpful and friendly.

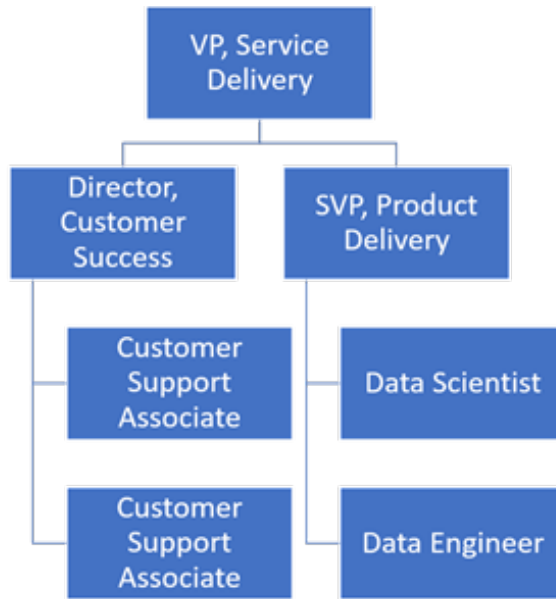
WaterSmart has provided project team resumes below.

Name / Title	Bio
Dana H. <i>Implementation Project Manager</i>	<p>Dana is responsible for working with individual utility partners to ensure that the WaterSmart implementation process and the ongoing program are seamless and successful. Dana has almost 20 years' experience in water conservation, utility program implementation, water resources and integrated planning, demand modeling, compliance assessment and policy. Prior to joining WaterSmart, Dana was the Water Use Efficiency Manager at Kennedy/Jenks consultants where she developed conservation plans and led other planning efforts for utility customers. As the Water Conservation Program Manager at the San Francisco Public Utilities Commission, she led the planning, development, and implementation of all demand-related activities at the utility.</p> <p>Dana holds a M.Sc. from New Mexico State and a B.Sc. from McGill University.</p> <p>Location: Dana reports into our San Francisco, CA hub location.</p>

Name / Title	Bio
Jim Turner <i>Director of Customer Relations</i>	<p>Jim Turner has been working with the WaterSmart Customer Success team since 2015 to ensure utility and customer satisfaction. He works with WaterSmart partner utilities across the continental United States and Hawaii and is the lead trainer for the WaterSmart Customer Success team. In the decade prior, Jim worked to leverage private sector resources for disaster preparation and response as Executive Director of the California Resiliency Alliance and as Private Sector Liaison for the San Francisco Department of Emergency Management. As a native of New Orleans, LA, the failed response to Hurricane Katrina moved Jim to use his skills and experiences to improve cross-sector response coordination, including the important role of utilities in emergencies and every day. Jim has an MBA concentrated on Organizational Development from University of San Francisco where he was also an Associate Professor teaching graduate Business Presentation and Writing.</p> <p>Location: Jim resides in. Austin, TX and reports into the WaterSmart Dallas, TX hub location.</p>
Lori Black <i>Customer Support Associate</i>	<p>Lori is the dedicated full-time Customer Support Associate. She is responsible for supporting customers in real-time using live chat. Along with customer support, she investigates utility data to solve data inconsistencies plus assists both WaterSmart’s Engineering and Customer Success teams. holds a</p> <p>Location: reports into our San Francisco, CA hub location.</p>
James Z. <i>Lead Data Scientist</i>	<p>James joined WaterSmart as the has been the Lead Data Scientist in 2021, and has worked as a data scientist since 2018. He spends his time designing experiments to improve the effectiveness of the WaterSmart program, applying machine learning techniques to inform the comparison algorithm, and provides insight to better inform individuals on how they use water. James has previously worked as a data scientist for a utility in California where he provided various utility departments with analytics services in order to improve processes and conservation efforts.</p> <p>James graduated from the University of California, Irvine with a BA of Psychology and Social Behavior (with an emphasis on statistics and experimental design). James went on to earn a master’s degree in Applied Data Science from the University of Michigan.</p> <p>Location: Will reports into our San Francisco, CA hub location.</p>

Name / Title	Bio
Data Engineer	<p>In addition, each utility is designated a data engineer to help during the implementation process. The Data Engineering team is responsible for onboarding WaterSmart's newest customers and creating custom solutions to enable utilities to get the most out of their data. They spend most of their time at WaterSmart wrangling data, building out backend processes, and working closely with new utility customers and third-party data providers to get their platform up and running smoothly. The Utility will be assigned one of our four data engineers upon signing contract.</p>

The diagram below depicts the project organizational structure:



3. REFERENCES:

A description of the project team's past record of performance on similar projects for which your firm has provided services. Include a discussion of such factors as control of costs, quality of work, and ability to meet schedules. Include client references that may be contacted by IRWD.

Our proposed team is highly qualified and experienced with WaterSmart deployments and have extensive implementation experience. The overall team is skilled in the areas of industry know-how, functionality, technology, and project management. The team also has experience working together on past WaterSmart projects. *WaterSmart has provided our project team resumes in the previous section 2. Team.*

WaterSmart has implemented **WaterSmart** for over 200 implementations across the history of our company.

Quality Control

The WaterSmart Project Manager carefully manages requirements approved to be delivered as part of the project and enforces strict quality control to ensure the data received from our clients matches what will be shown on the portal. WaterSmart utilizes an alerting system to check the quality of data which alerts the assigned Customer Success Manager if major issues are found. Suspect reads are flagged and added to a suspect read report on the Utility Analytics Dashboard. Missing reads are labeled, and alerts are suspended for those with determined gaps.

New data provided to the WaterSmart platform is also processed in this manner. Account, billed consumption and other data are typically updated on a daily or weekly basis at the Utility partner's preferred frequency.

Cost Management

WaterSmart uses an industry leading cost management methodology including resource planning, cost estimates, cost budgeting, and cost controls. Our resource plan accounts for all activities in the project plan from which we can estimate our costs for the project. Our budget provides a view of the periodic and total costs within the specified timeframe of the project. Our cost controls measure the actual cost of the project, so we can compare actual costs against our budget. Detailed cost metrics and reporting ensure we understand our expenditures at every phase of the project and can make appropriate adjustments as needed to stay in budget.

Specifically, our cost controls include weekly reporting of hours worked and accrued expenditures for each resource on the project. Expenditures include travel, equipment, and other costs incurred by our resources. These cost totals are compared against our budget each month and reported to our internal finance team and sponsors for review. Adjustments are made to our resource allocations and travel plans as needed to control costs.

Customer Reference: Glendale Water and Power

Glendale Water and Power has been a WaterSmart customer since 2014. Single-family residential (SFR) customers receive bi-monthly Water Reports, which include their water use as compared to similar households in their service area, and targeted messages to help customers better understand their water consumption and help drive conservation and engagement. Using meter data from Glendale's Advanced Metering Infrastructure, WaterSmart's high use and continuous use alerts inform customers immediately of potential leaks, and utility leak alerts are sent by email. The program also includes access to WaterSmart's Customer Portal, an online personalized platform that shows all of Glendale's customers real-time, historic and seasonal usage, as well as tips and instructional videos, on how to reduce indoor and outdoor water use. Single-family residential (SFR) customers can also view details about their leaks, including size, duration and potential fixes, on their Customer Portal. Control of costs has been maintained by a fixed contract price per year, along with all future service updates requiring no additional cost or installation steps.

WaterSmart also maintains its quality of work and ability to meet schedules by adhering to the timeline as provided in the Scope of Work, and delivering services within the budget allocated. This allows us to yield effective results for the utility.

Contact:

Herbert Garcia, Public Benefit Programs Supervisor

Atineh Haroutunian, Public Benefits Coordinator

141 N. Glendale Ave., Level 2, Glendale, CA 91206

hgarcia@ci.glendale.ca.us, 818.548.2749

aharoutunian@glendaleca.gov, 818.548.3381



Customer Reference: East Bay Municipal Utility District (EBMUD)

In December 2011, WaterSmart Software and EBMUD signed an agreement to begin a pilot program with 10,000 single-family homes with the goal of better understanding and reducing residential water use through increased participation in EBMUD's efficiency and rebate programs, financial incentives, and social norms. The Program included a customer survey, delivery of bi-monthly Water Reports and access to the Customer Portal and Utility Analytics Dashboard web applications. The year-long Pilot resulted in WaterSmart surpassing expectations and delivering significant progress including an average annual reduction in water use of 5%; an increase in program participation of 300%; and an increase of 200% in customer satisfaction levels as assessed by WaterSmart and a third party independent report (available from the California Water Foundation). WaterSmart is now two years into a three-year expansion of the program with EBMUD. Control of costs has been maintained by a fixed contract price per year, along with all future service updates requiring no additional cost or installation steps.

WaterSmart also maintains its quality of work and ability to meet schedules by adhering to the timeline as provided in the Scope of Work, and delivering services within the budget allocated. This allows us to yield effective results for the utility.

Contact:

Jessica Woodard, Water Conservation Representative

East Bay Municipal Utility District

375 11th Street

Oakland, CA 94607

jessica.woodard@ebmud.com, (510) 287-1019



4. SCHEDULE:

Assurance of the firm's ability to complete all work considering the firm's current and planned workload based on the proposed schedule.

Confirmed. WaterSmart is confident we can deliver our **WaterSmart** solution to IRWD within the proposed project schedule, assuming that there are no significant variances in the scope of work and assuming contract agreement can be reached by July 1, 2022.

Our project staffing approach focuses on aligning the IRWD and WaterSmart team members. We fully engage your staff throughout the WaterSmart implementation phases. This direct involvement makes for effective project delivery, transition and knowledge transfer.

- **Cohesiveness** – Team members' individual skills complement each other well, supporting collaboration and cohesiveness
- **Efficiency** – By leveraging the IRWD's core team members and complementary WaterSmart team members, we maximize availability and knowledge of individuals assigned to the project
- **Experience** – Our proposed team is highly qualified and experienced with **WaterSmart** deployments and have extensive implementation experience. The overall team is skilled in the areas of industry know-how, functionality, technology, and project management
- **Knowledge transfer** – Our team members have extensive knowledge transfer experience, and have done similar work at several of our reference clients

Additionally, WaterSmart has successfully implemented and ran the IRWD program for almost 10 years. There are no additional major implementation steps that have not already been successfully completed.

5. BUDGET:

An analysis of the estimated hours that each member of the project team will contribute for the individual tasks depicted in the scope of work. Also include the identity and estimated costs of all sub-consultants, reproduction costs, and other direct costs. IRWD will pay for actual salary times hours spent times a multiplier plus direct costs. For budget purposes and as a basis for later contract negotiations:

Control of costs is a factor that is very important to WaterSmart. We are proud to be a SaaS (Software as a Service) company. All the services and technologies included in this proposal are available inclusively for a fixed contract price per year, and all future service updates will require no additional cost or installation steps. Our SaaS model means there are no hardware installation requirements, and there will be no consulting fees required to utilize the proposed services. While being competitive in our price point, we also maintain pricing that is very fair, while using our resources wisely. We assure you that this is the case for every project and client.

There will be no implementation fee required as a response to this RFP. The only implementation effort currently identified may be related to expanding and/or updating the Customer Use Report recipient group.

WaterSmart is able and willing to provide the most impactful, cost-effective solution to IRWD. With consideration of the current WaterSmart IRWD program and the requests in this RFP, we've provided two options for IRWD consideration. Beyond these two options, WaterSmart is willing to utilize the provided marginal costs for reports to tailor fit a program to satisfy IRWD objectives and budgetary preferences.

All pricing options below are annual.



Program Option 1

Monthly Reports for all Customers, *Quarterly* Print Reports for those without Email Addresses (assuming 86,542 accounts have working email addresses)

Product	Price*	Annual Volume	Total Cost
WaterSmart Platform	\$ 0.85	122,978	\$ 104,531.30
Print Customer Use Reports	\$ 0.85	145,744	\$ 123,882.40
Email Customer Use Reports	\$ 0.02	920,412	\$ 18,408.24
Premium Integration - Paymentus	\$ 6,000.00	1	\$ 6,000.00
Program Management	\$ 8,800.00	1	\$ 8,800.00
Total			\$ 261,621.94

Program Option 2

Monthly Reports for all Customers, Monthly Print Reports for those without Email Addresses (assuming 86,542 accounts have working email addresses)

Product	Price*	Annual Volume	Total Cost
WaterSmart Platform	\$ 0.85	122,978	\$ 104,531.30
Print Customer Use Reports	\$ 0.85	437,232	\$ 371,647.20
Email Customer Use Reports	\$ 0.02	1,038,504	\$ 20,770.08
Premium Integration - Paymentus	\$ 6,000.00	1	\$ 6,000.00
Program Management	\$ 8,800.00	1	\$ 8,800.00
Total			\$ 511,748.58

For clarity, reference, and potential input to further customize the desired WaterSmart program, please see the current program pricing and the marginal costs for each line item below.

IRWD Adjusted Costs for Option 2	Price	Annual Volume	Total Cost
WaterSmart Platform	\$ 0.85	122,978	\$ 104,531.30
Email Customer Use Reports	\$ 0.02	1,038,504	\$ 20,770.08
Premium Integration - Paymentus	\$ 6,000.00	1	\$ 6,000.00
Program Management	\$ 8,800.00	1	\$ 8,800.00
Subtotal			\$ 140,101.38
Print Customer Use Reports	\$ 0.85	60,000	\$ 51,000.00
Total			\$ 191,101.38

* Subject to a 3% annual escalator

Current WaterSmart Program - No Changes in Scope, 2022 Pricing

83,978 Customer Use Report Recipients; 76,701 via Email; 7,227 via Print

Product	Price	Volume	Total Cost
WaterSmart Platform	\$ 0.85	122,978	\$ 104,531.30
Print Customer Use Reports	\$ 0.85	86,724	\$ 73,715.40
Email Customer Use Reports	\$ 0.02	920,412	\$ 18,408.24
Premium Integration - Paymentus	\$ 6,000.00	1	\$ 6,000.00
Total			\$ 202,654.94

The RFP issued by IRWD requests that reports are delivered to all 122,978 customers. The below pricing details the marginal cost per Customer (email vs no email) for the expansion from 83,978 to 122,978 Report Recipients (an increase of 39,000 recipients monthly).

Product	Price	Volume
Print Customer Use Reports	\$ 0.85	1
Email Customer Use Reports	\$ 0.02	1

Additionally, the RFP requests enhanced Program Management in the form of Monthly Reports with each monthly invoice as well as detailed Annual Reviews.

Product	Price*	Annual Volume	Total Cost
Program Management	\$ 8,800.00	1	\$ 8,800.00

Should questions arise from the pricing format and model provided, WaterSmart is happy to provide further clarification.

* Subject to a 3% annual escalator

• Provide a proposed multiplier and a not-to-exceed amount for each phase of the work.

Please see the previous section.

• Outline, any additional costs, or process changes if IRWD implements a new data management system after program set-up.

Should IRWD provide data files in a new format which requires WaterSmart to re-onboard new file structures or map historical identifiers (e.g., customers, accounts, premises), WaterSmart assesses an additional one-time fee not to exceed \$10,000 upon receipt of first test files from the new system.

6. JOINT VENTURE:

A descriptive disclosure of any joint venture and/or proposed subcontract arrangements that would be utilized during the project.

Other than our datacenter provider, AWS, no third parties will be involved in the proposed systems, implementation and ongoing support.

7. CONFLICT OF INTEREST:

Documentation that personal or organizational conflicts of interest prohibited by law do not exist.

WaterSmart does not have any conflicts of interest as it pertains to providing services to IRWD.

8. INSURANCE:

A submittal from either the firm's insurance carrier or equivalent regarding the firm's professional liability coverage. IRWD requires professional liability coverage to be a minimum of \$1,000,000, general liability and property damage to be a minimum of \$1,000,000. Any additional premium that is required by the insurance carrier for such coverage should be included in your proposed fee. IRWD will not pay a separate insurance surcharge for the required coverage. See attached sample of IRWD's Professional Services Agreement, Exhibit "A", for information on insurance coverage.

Confirmed. WaterSmart has provided this as *Attachment B – WaterSmart Certificate of Insurance*.

9. CONTRACT:

A sample copy of IRWD's Professional Services Agreement is attached as Exhibit "A". Include in your proposal any proposed modifications to the standard terms and conditions. While IRWD rarely negotiates such changes with consultants, IRWD will consider your proposed modifications during consultant selection and retains the right to reject any portion of your proposed modifications.

Confirmed. WaterSmart has reviewed the Professional Services Agreement provided by IRWD and believes that we will be able to come to a mutually acceptable agreement. There are no significant exceptions or deviations that need to be addressed that we feel could hinder our ability to reach a mutually acceptable agreement. A redlined version of the provided agreement has been provided with this response as ***Attachment C – IRWD Professional Services Agreement – WaterSmart Modifications.***

WaterSmart has provided a sample of our standard Contract Terms & Conditions as ***Attachment D - WaterSmart Sample MSA.***

June 13, 2022

Prepared by: A. McNulty

Submitted by: F. Sanchez / P. Weghorst

Approved by: Paul A. Cook *[Signature]*

ACTION CALENDAR

FUNDING FOR EXPANSION OF IRWD TURF REBATE AND LANDSCAPE TUNE-UP PROGRAMS

SUMMARY:

To prepare for probable mandatory water use reductions and to help commercial, industrial and institutional (CII) customers respond to the recent ban by the State Water Resources Control Board of non-functional turf irrigation, IRWD can increase funding for existing water efficiency programs. The Turf Rebate Program encourages customers to remove turf, while the Landscape Tune-up Program provides customers with access to professional landscape contractors to make irrigation system repairs. As part of IRWD's response to expected mandates, staff recommends the Board increase the budget for the Turf Rebate Program by \$1 million and approve a variance and budget increase for the Landscape Tune-up Program in the amount of \$131,000.

BACKGROUND:

On May 24, the State Board adopted an emergency regulation that bans the use of potable water for irrigation of non-functional turf in the CII sector and requires water suppliers to implement Level 2 demand measures listed in their Water Shortage Contingency Plans to achieve water savings of up to 20%. Governor Newsom has stated that unless water suppliers demonstrate significant water savings over the next 60 days, he would likely require mandatory water use reductions.

IRWD implements numerous water efficiency programs to help customers reduce their water use. Programs include educational resources, workshops, targeted outreach for high use, rebates and one-on-one assistance. To help CII customers respond to the recent ban on non-functional turf irrigation and in anticipation of mandatory water use reductions, staff recommends increasing funding for two of the District's existing water efficiency programs: the Turf Rebate Program and the Landscape Tune-up Program. These programs were selected for immediate expansion, since they are available for both residential and CII customers and address outdoor water use where there is the greatest potential for savings. Having additional funding in place for these programs will position IRWD to respond quickly to future drought requirements by increasing participation in these programs. As with all IRWD water efficiency programs, funding for these programs is provided from over-allocation revenues. The following provides support for increasing funding for the two programs.

Turf Rebate Program:

IRWD participates in the regional Turf Rebate Program through its Water Conservation Participation Agreement with MWDOC. IRWD funding is provided in addition to funding from Metropolitan Water District and MWDOC. This program is ongoing and can easily be expanded by increasing IRWD's incentives and program marketing. The District's adopted budget for FY 2022-23 includes \$70,000 for the program, which is based on participation rates from 2020.

With heightened awareness of the drought and the ban on irrigation of non-functional turf, increasing the budget for this program will position IRWD to provide a viable option for commercial customers who will need to abandon their turf landscapes. IRWD currently provides \$1 per square foot to the regional rebate program, which results in a total rebate of \$4 per square foot for residential customers and a total rebate of \$3 per square foot for potable CII customers. The proposed additional \$1 million in funding would increase the total rebate to \$5 per square foot for both customer groups.

Landscape Tune-up Program:

In April 2021, IRWD entered into an agreement with Conserv Construction, Inc. to offer a shared-cost landscape audit and “tune-up” program to help residential customers avoid water waste caused by an inefficient irrigation system. The program offers customers a landscape audit to identify irrigation system and scheduling problems. Irrigation repairs are offered to customers with a 50% cost-share. The program launched in July 2021; to date, 134 residential customers have participated and expended approximately \$50,000. In December of 2021, Variance No. 1 was executed to expand the program funding from the original range of \$40,000 to \$130,000 as well as to open the program to commercial landscape sites using potable water. A second variance was executed to slightly modify the fee schedule to accommodate additional bond requirements from IRWD. Variance No. 2 did not change the overall program budget of \$130,000. Staff recommends that the Board approve a budget increase and Variance No. 3 with Conserv in the amount of \$131,000 to provide funding for up to 200 additional residential participants and 20 CII customers. Funding can be re-allocated between the customer groups based on response. Variance No.3 is provided as Exhibit “A”.

FISCAL IMPACTS:

Increased funding for the Turf Rebate and Landscape Tune-up Programs in the amount of \$1,000,000 and \$131,000, respectively for FY 2022-23, would be provided from over-allocation revenues. These funds are needed to respond to near-term mandated reductions in water use.

ENVIRONMENTAL COMPLIANCE:

This item is not a project as defined in the California Environmental Quality Act (CEQA) as authorized under the California Code of Regulations, Title 14, Chapter 3, Section 15378.

COMMITTEE STATUS:

This item was reviewed by the Water Resources Policy and Communications Committee on June 2, 2022.

RECOMMENDATION:

THAT THE BOARD AUTHORIZE ADDITIONAL FUNDING IN THE AMOUNT OF \$1,000,000 FOR THE TURF REBATE PROGRAM AND \$131,000 FOR THE LANDSCAPE TUNE-UP PROGRAM AND APPROVE VARIANCE NO. 3 WITH CONSERV CONSTRUCTION INC. IN THE AMOUNT OF \$131,000.

LIST OF EXHIBITS:

Exhibit "A" – Conserv Construction Inc. Variance No. 3

Note: This page is intentionally left blank.

Exhibit "A"
IRVINE RANCH WATER DISTRICT
PROFESSIONAL SERVICES VARIANCE

Project Title: IRWD Landscape Irrigation Tune-Up Program

Project No.: _____ Date: June 7, 2022

Purchase Order No.: 624175 Variance No.: 3

Originator: IRWD ENGINEER/CONSULTANT Other (Explain) _____

Description of Variance (*attach any back-up material*):

The Program budget will increase from \$130,000 to \$261,000 to expand the program as part of IRWD's drought response efforts.

Engineering & Management Cost Impact:

Classification	Manhours	Billing Rate	Labor \$	Direct Costs	Subcon. \$	Total \$
Agreement Increase Amount for Program Expansion				\$131,000		\$131,000
Total \$ =						\$131,000

Schedule Impact:

Task No.	Task Description	Original Schedule	Schedule Variance	New Schedule

Required Approval Determination:

Total Original Contract	\$ <u>40,000</u>	<input type="checkbox"/> Director: Cumulative total of Variances less than or equal to \$50,000. <input type="checkbox"/> Executive Director: Cumulative total of Variances less than or equal to \$75,000. <input type="checkbox"/> General Manager: Cumulative total of Variances less than or equal to \$100,000. <input checked="" type="checkbox"/> Board: Cumulative total of Variances greater than \$100,000.
Previous Variances	\$ <u>90,000</u>	
This Variance	\$ <u>131,000</u>	
Total Sum of Variances	\$ <u>221,000</u>	
New Contract Amount	\$ <u>261,000</u>	
Percentage of Total Variances to Original Contract	<u>553</u> %	

ENGINEER/CONSULTANT: Conserv Inc
 Company Name

IRVINE RANCH WATER DISTRICT

 Project Engineer/Manager Date

 Department Director Date

 Engineer's/Consultant's Management Date

 General Manager/Board Date