



SONOMA COUNTY FIVE-YEAR STRATEGIC PLAN 2021–2026

Implementation Plan



CLIMATE ACTION AND RESILIENCY

- Goal 1** Continue to invest in wildfire preparedness and resiliency strategies
- Objective 1** Provide educational resources to the community that promote and facilitate carbon neutral and fire hardening construction for new and existing homes.
- Lead(s)** Jane Elias, John Mack

IMPLEMENTATION IDEAS AND PROJECTS

Sonoma County General Services Energy and Sustainability Division and Permit Sonoma provide educational and community resources for carbon neutral, resiliency and fire hardening construction for new and existing homes for landowners to support them in mitigating climate and fire risk. This will be accomplished in collaboration with other County agencies, departments, and community partners. Staff will develop an outreach and education strategy, and will develop resource and program materials and implement community outreach efforts pursuant to that strategy. Initial work will be accomplished through the Energy and Sustainability Division's programs and Permit Sonoma's Wildfire Adapted, Hazardous Fuels, and Building Resilient Infrastructure and Communities FEMA grants. Staff will work together to develop a clear understanding of the differences of these efforts and how each can best meet landowner needs. Staff will develop materials for individual programs and maintain a collection of resources that are available to landowners.

General Services Energy and Sustainability Division has been actively providing outreach and education efforts related to carbon neutrality since 2011 and efforts towards fire hardening/resiliency since January 2018 after the 2017 fires. This includes webinars, workshops, meetings with rebuilding team captains, individual consultations, creating new and updating other outreach collateral, ads, expansion of financing to include seismic and wildfire, battery storage systems, etc. We work closely with Fire Protection on a coordinated outreach plan for high-risk fire areas. In addition, we partner with the Regional Climate Protection Authority (RCPA) through the Bay Area



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Regional Energy Network (BayREN) to administer programs and services related to carbon neutrality or switching from fossil fuel sources to electricity. These BayREN programs offer rebates to single-family, multi-family and commercial building owners working to increase their energy efficiency and achieve goals towards carbon neutrality, have participating contractors and provide education and training opportunities to several types of audiences. We have also partnered with Sonoma Clean Power through their lead local grant to offer educational resources related to decarbonization, and delivered impartial information related to resources available to residents to assist them in achieving these goals. The plan is to try and continue these efforts and add more resources through partnership opportunities.

Permit Sonoma will develop and implement the outreach, education, and funding programs outlined in Wildfire Adapted Sonoma County and Hazardous Fuels Management for Sonoma County FEMA Hazard Mitigation Grants and the Building Resilient Infrastructure and Communities Grant (BRIC) FEMA grant. These grants will reimburse a portion of the cost for installing fire hardening measures for eligible homeowners based on a structure hardening assessment performed by the County. In addition, these grants will fund multiple term positions including a full-time media specialist position, a GIS specialist to produce story maps, several project managers, and other subject matter specialists. These expanded efforts will be integrated into an overall update of its web and social media wildfire risk reduction platforms.

Through collaboration, staff will utilize their expertise and develop an outreach and education strategy, create resource and program materials, and implement community outreach efforts pursuant to promoting and facilitating carbon neutral and fire hardening construction for new and existing homes.

Milestones:

- November/December 2021: Request for \$265,000 additional funding for 2 years from the strategic plan fund to provide educational and community resources for carbon neutral, resiliency and fire hardening construction for new and existing homes for landowners for existing FY 2021-22
 - November 2021- April 2022: Conduct partner meetings to create marketing plans, establish roles, understand any limitations towards leveraged funds towards this effort
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- April 2022 – June 2022: Develop and create multi-channel outreach effort with goals and metrics to track success. Request for funding through budgetary process for FY 2022-23 for costs associated to implementation of enhanced education and outreach efforts
- July 2022: Launch education and outreach campaigns
- Ongoing: Track progress through metrics
- mid 2022-2024: Seek and apply for additional funding sources and opportunities to sustain efforts until FEMA grants are fully implemented

METRICS

The outreach and education strategy will include deadlines and performance measures for development and implementation of outreach materials and approaches. Staff will measure outreach and education performance based upon these standards. The development and implementation of the County's current Energy and Sustainability Program and the various FEMA grant programs will be high level indicators that demonstrate progress towards achieving this objective. However, each of the individual programs will develop more specific performance measures to ensure success of the program and progress towards reaching the objective. These measures are likely to include amount of funds awarded/expended, numbers of houses built or retrofitted with carbon neutral/fire hardening measures, number of trainings/community meetings held, and typical social media tracking measures, etc.

Data will be collected on the number of residents utilizing the resources, # of attendees, # of homes/businesses performing upgrades, types of upgrades happening, utilize standardized calculators to estimate the offset of carbon from improvements made and equate that data to make it understandable for all, share and celebrate successes with the public. Work with contractors that do this work and identify potential contractors that could expand their service to incorporate these improvements. Also, data will include viable surveys. Ask the community how/what can be offered that will assist them in making decisions related to these topics. Engage stakeholder focus groups, as identified through the marketing and outreach plans and strategies, to generate ideas of how to bring about behavioral change and best practices to approach these topics with the community. Include stakeholders that speak to the equity and social justice concerns related to achieving carbon neutrality. Permit Sonoma and ESD will



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consider employing expert consultants to evaluate any economic and/or social drivers and impacts associated to the outreach and resulting projects.

COORDINATION & PARTNERSHIP

We will leverage existing partnerships with each co-lead organization. We will involve cities and community partners, as appropriate, to the focus groups and stakeholder groups and invite participation and feedback, including any efforts in jurisdictions currently going on or under development. Include lessons learned and best practices. Present and promote educational resources to the community that promote and facilitate carbon neutral and fire hardening construction for new and existing homes. Share the data as it's reported out.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

We will engage the public through multi-level marketing and outreach. To measure the success of this, we will collect identified data, metrics and reporting, as mentioned above.

Applying an equity lens can be done in the decarbonization sector. Anything involving FEMA funding, i.e. HMGP or BRIC, has limitations and strict guidelines pertaining to satisfying their requirements. Through stakeholder and focus groups in the planning and development stages to ensure unintended consequences are identified. Materials and channel marketing will be available in bi-lingual. Staff resources will also include bi-lingual capabilities. Both co-leads are county government entities. Providing educational resources to the community that promote and facilitate carbon neutral and fire hardening construction for new and existing homes touches all the county, geographically speaking.

When possible, materials will be limited in print and digital as much as possible and where it makes sense. Workshops, trainings or meetings will be offered virtual, when most appropriate for the audience, so as to reduce transportation emissions.

FUNDING

It is recommended that funding continue to be provided for the current Energy and Sustainability services and programs. When feasible, these funds can be leveraged as match for future funding applications. Further funding sources possibly include BRIC money, PG&E settlement money, HMGP funding, and climate funds, but these are



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one-time funds. Existing funding and others mentioned can be leveraged for potential future grants and federal infrastructure bills. Also, partnerships with SCP, BayREN and PG&E programs. New partnerships with cities or other county agencies/departments. There will be a one-time request of funds from the \$5M Strategic Plan Fund to support these efforts for a 2 year period. All HMGP and BRIC are one-time. Current funds available in ESD are through term-limited contracts that are renewed annually or every 2-3 years.

In ESD, we have limited funding for carbon neutral construction through BayREN for the education/outreach piece. SCEIP can provide financing for any of these improvements. Funding sources have been identified for the initial programs for fire hardening structures. These include \$17 million for FEMA Hazard Mitigation grants (Wildfire Adapted and Hazardous Fuels) and the \$50 million in BRIC grant funding (FEMA grant numbers are total project budgets including 25% County match).

Most of this funding will be on-going until goals are achieved. The one-time request from the Strategic Plan Fund will be for additional outreach and education effort and tracking and reporting details. The request is for a 2 year period.



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CLIMATE ACTION AND RESILIENCY

- Goal 1** Continue to invest in wildfire preparedness and resiliency strategies
- Objective 2** Expand outreach and education on vegetation management and provide additional resources to land owners to help mitigate fire risk.
- Lead(s)** Misti Arias, John Mack, Stephanie Larson

IMPLEMENTATION IDEAS AND PROJECTS

Sonoma County Ag + Open Space, Permit Sonoma, and UC Cooperative Extension will co-lead an effort to develop and implement an array of well-defined and easily understood resources and programs for landowners to support them in mitigating fire risk. This will be accomplished in collaboration with other County agencies, departments, and community partners. Staff will develop an outreach and education strategy, and will develop resource and program materials and implement community outreach efforts pursuant to that strategy. Specific actions to further this objective include:

- Convene all agencies and departments with vegetation management efforts planned or in process by end of 2021
 - Create a vegetation management technical advisory committee by the end of 2021
 - Host PG&E settlement funding vegetation management grant workshops end of 2021 and beginning of 2022
 - Document and describe all vegetation management efforts by early 2022
 - Develop a strategy to communicate vegetation management efforts with the community by early 2022
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- Provide a multi-agency/department comprehensive vegetation management update to the board by May 2022
- Create vegetation management outreach materials, including a website by end of 2022
- Work with partners and the technical advisory committee to identify the best approach to using the remainder of the PG&E settlement funds to create a long-term vegetation management program by end of 2022
- Work with partners and the technical advisory committee to identify best management practices for vegetation management that is focused on healthy ecological function and fire resilience to share with the community – ongoing
- Update communications strategy, website, and outreach materials as needed – ongoing

Initial work will be accomplished through existing programs including the PG&E settlement vegetation management grant program, the Wildfire Adapted, Hazardous Fuels, and Building Resilient Infrastructure and Communities (BRIC) FEMA grants, and UC Cooperative Extension's vegetation management assistance program. Staff will work together to develop a clear understanding of the differences of these efforts and how each can best meet landowner needs. Staff will develop materials for individual programs and maintain a collection of resources that are available to landowners.

Ag + Open Space has hired a Vegetation Management Program Coordinator that will coordinate efforts of all involved county departments and agencies to develop and provide a variety of resources that are well understood by landowners. Ag + Open Space will formalize the process for providing PG&E vegetation management funding to landowners. The Vegetation Management Coordinator will then develop outreach and education materials, and a strategy for sharing that information with community partners and the public. Ag + Open Space will administer an ongoing grant program to provide PG&E funding to landowners for vegetation management. In addition, the Vegetation Management Coordinator will work to leverage the remaining PG&E settlement vegetation management funding to the greatest extent possible.

Permit Sonoma will develop and implement the outreach, education, and funding programs outlined in Wildfire Adapted Sonoma County and Hazardous Fuels Management for Sonoma County FEMA Hazard Mitigation Grants and the Building Resilient Infrastructure and Communities Grant (BRIC) FEMA grant. These grants will fund



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multiple term positions including a full-time media specialist position, a GIS specialist to produce story maps, several project managers, and other subject matter specialists. These expanded efforts will be integrated into an overall update of its web and social media wildfire risk reduction platforms. With additional funding provided by the Board, Permit Sonoma will also expand its Environmental Review practice group by hiring extra-help Senior Environmental Specialists to provide CEQA/NEPA/Permitting and project scoping services, including preparation of CalFire Vegetation Treatment Program documentation, in support of public projects and the PGE grant program.

UC Cooperative Extension will hire a Department Program Manager to develop a Vegetation Management Division. This position will work across county departments, agencies, NGOs, and private and public land owners. The position will provide educational information on vegetation management, with special focus on the Wildfire Fuel Mapper Tool.

Ag + Open Space, Permit Sonoma, and UCCE will coordinate as we develop vegetation management programs to ensure that there are clear descriptions of each of the programs that makes it clear how the programs are different and also how they complement one another. As part of the outreach strategy, we will identify the best types of communication and how best to share them with the community.

METRICS

The outreach and education strategy will include deadlines and performance measures for development and implementation of outreach materials and approaches. Staff will measure outreach and education performance based upon these standards. The development and implementation of the PG&E settlement funds vegetation management grant program and the BRIC grant program will be high level indicators that demonstrate progress towards achieving this objective. However, each of the individual programs will develop more specific performance measures to ensure success of the program and progress towards reaching the objective.

These measures are likely to include amount of funds awarded/expended, acres of land or percentage of priority areas where vegetation management is conducted, amount of fuel reduction, and reaction of these areas to fire in comparison to areas that did receive funding for vegetation management. Staff will develop baselines to better evaluate performance over time. Additional measures and/or indicators could include staff hiring dates, number of grant applications reviewed/funded, number of environmental reviews performed (e.g., # of CalFire VTPs prepared), meeting grant deliverable dates, numbers of outreach events/community meetings, various social media



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tracking measures, funds secured through other funders, and we can estimate that increase in carbon sequestration through practice implementation (same protocol used by CDFA Healthy Soils program).

COORDINATION & PARTNERSHIP

County agency leads, including those from Permit Sonoma, Regional Parks, CARD, Transportation and Public Works, and Probation, will be included in the vegetation management technical advisory committee and will be directly involved in developing the communications strategy and associated outreach materials. The technical advisory committee will also include local fire, ecology and vegetation management experts, including fire agencies, Sonoma and Gold Ridge Resource Conservation Districts, Sonoma Ecology Center, Pepperwood Foundation, Fire Forward, Good Fire Alliance, and Fire Safe Sonoma.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

The purpose of this objective is to enhance our ability to communicate with the public about local vegetation management efforts. Therefore, the actions outlined in this implementation plan address public engagement specifically. The communication strategy will incorporate approaches that are intended to reach all members of our diverse community. The vegetation management outreach and education efforts will help better inform the community about vegetation management practices that are beneficial to climate resilience as well as natural systems and fire resilience.

FUNDING

It is recommended that funding continue to be provided for the grant program, the Ag+OS vegetation management coordinator, the Permit Sonoma Senior Environmental Specialists for environmental review support, and match for future HMGP and BRIC grant applications.

Funding sources have been identified for the initial programs. These sources include \$25 million dollars from the PG&E settlement, \$17 million for FEMA Hazard Mitigation grants (Wildfire Adapted and Hazardous Fuels) and the \$50 million in BRIC grant funding (FEMA grant numbers are total project budgets including 25% County match). Ag + Open Space sales tax dollars are not eligible to be used to fund Countywide vegetation management efforts to reduce fire risk unless those projects are completed on Ag + Open Space-owned and managed properties.



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Therefore, all staff and program costs will be funded with the PG&E settlement funds and future identified funding sources. Ag + Open Space will need additional funding to cover staff, supervision, position related costs of the Vegetation Management Coordinator for three years and additional funding to cover program related costs in support of the grant program, outreach and measurables. Staff will have a better idea of the funding needed once we have completed the communications strategy and can estimate the costs of outreach materials and staffing. Ag + Open Space will bring forward a request for a portion of the PG&E settlement vegetation management funds for this purpose. The Board also authorized \$300K to fund extra-help Senior Environmental Specialists at Permit Sonoma to provide environmental review support for the PG&E grant program.



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CLIMATE ACTION AND RESILIENCY

- Goal 1** Continue to invest in wildfire preparedness and resiliency strategies
- Objective 3** Leverage grant funding to support sustainable vegetation management program
- Lead(s)** Misti Arias, John Mack, Christel Querijero

IMPLEMENTATION IDEAS AND PROJECTS

Sonoma County Ag + Open Space, Permit Sonoma, and the County Administrator's Office will co-lead an effort to leverage grant funding to support sustainable vegetation management programs. This will be accomplished in collaboration with other County agencies, departments, and community partners. Staff of our organizations have already had great success in leveraging funding for vegetation management including being selected for a State Coastal Conservancy Wildfire Resilience Grants and a FEMA Building Resilient Infrastructure and Communities Grant (BRIC).

Staff will build upon this success to further leverage grant and PG&E settlement funds identified for sustainable vegetation management. Ag + Open Space has hired a Vegetation Management Coordinator that will lead the effort to further leverage county \$25 million in PG&E settlement funds identified for vegetation management to reduce wildfire risks. The Vegetation Management Coordinator will identify and pursue outside funding consistent with the Center for Law, Energy, & the Environment (CLEE) report. The Vegetation Management Coordinator will use applications for the PG&E grant funds to identify the financial need and gap in funding to implement CEQA ready projects vegetation management projects. Based upon the identified gap, the Vegetation Management Coordinator will identify and pursue additional public and private funding opportunities in an effort to fully fund all eligible projects.

METRICS



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In order to measure our progress in meeting this objective, staff will document current funds available and identify gaps in funding needed to implement all CEQA ready projects on an annual basis. Staff will measure progress based upon the amount of the gap funding acquired. Success could also be measured by evaluating the impact of leveraged funds, which could take on several forms (area of land managed, programs implemented, people reached, etc.).

There are many vegetation management efforts on-going across many County departments, divisions and agencies, so it will be important to track all of this work to develop good data on our overall County impact. Good coordination will also position the County in better positions for grant applications

COORDINATION & PARTNERSHIP

As was mentioned before, collaboration is a key piece to this implementation plan. Vegetation management efforts are occurring in many different County departments, divisions and agencies, as well as with other community-based organizations. The new Vegetation Management Coordinator at Ag + Open Space has taken the lead on organizing efforts, as are a number of other collaborators (including the CAO's office working on the Fire Tax Measure). Ag + Open Space has already begun convening partners in roundtable discussions and has formed a technical advisory committee built of local vegetation management experts to help advise the County's Vegetation Management program.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

Successes in securing grant funding will be shared with the community so that progress is recognized. The CAO also hosted a Climate Townhall in 2021 in which public input was gathered on vegetation management. There are also discussions around broader outreach efforts to address public perception of vegetation management.

Ag + Open Space's Vegetation Management Program oversees the PG&E veg management grant program, and is preparing for its second cycle. Grants are awarded with equity concerns, geographies and local risks very much in mind. The while the Vegetation Management Program focuses on wildfire risk, it also heavily weighs environmental and climate impacts.



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FUNDING

Funding sources have been identified for the initial vegetation management programs. The actions in this object will seek to acquire additional outside funds to expand upon this work. Therefore, beyond staff costs, there will be not additional fiscal impacts or funding needs. Ag + Open Space sales tax dollars are not eligible to be used to fund Countywide vegetation management efforts to reduce fire risk unless those projects are completed on Ag + Open Space-owned and managed properties. Therefore, all staff costs associated with efforts to raise funds to expand and enhance the Countywide vegetation management program will be funded with the PG&E settlement funds and future identified funding sources.



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CLIMATE ACTION AND RESILIENCY

- Goal 2** Invest in the community to enhance resiliency and become carbon neutral by 2030
- Objective 1** Support carbon eliminating microgrid (MG) technology in communities and energy grid resilience to reduce impact of power loss during power shutdowns and natural disasters (floods, fires, earthquakes) through education and legislative advocacy, prioritizing critical infrastructure and vulnerable populations.
- Lead(s)** Marissa Montenegro, Jane Elias
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IMPLEMENTATION IDEAS AND PROJECTS

Our approach to implementation will help achieve the pillar goal by increasing community resiliency against disasters and public safety power shutoff (PSPS) events. Energy and Sustainability has joined 2 working groups related to community microgrids (MG). The first is with the Local Gov't Sustainable Energy Coalition (LGSEC), which provides input to the rulemaking process regarding microgrids. The other is the PG&E working group for creating a Community MG Program that offers incentives/rebates. The investor owned utilities (IOUs) were allocated a total of \$200M to figure out a MG Program and distribution of the money to the IOU's. These efforts are to better understand what is necessary for a MG to happen on a community scale.

As a matter of supporting the community in this effort, there may be legislative efforts to support or sponsor legislation and/or comments in regulatory rulemaking or hearings. This would entail identifying legislative asks, drafting legislative language to present to our legislators, and monitoring the legislative process.

There are challenges with creating community microgrids. There are existing laws and regulations through the California Public Utilities Commission (Rule 2 and Rule 21) and the IOU's that do not readily allow for them. In addition, the Electrical Unions have concerns. The progress needed to move this objective forward will require complete understanding of the regulatory landscape involved and the political will to move this forward in "support"



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of creating community microgrids. This will involve strategic partnerships with Sonoma Clean Power and other agencies that could affect change.

Proposed high-level timeline and milestones:

- 2021-2022 – Develop MG needs
- Fall 2021 and 2022 – Develop Legislative Ask
- 2022 – Monitor legislation

METRICS

Tracking progress: It is difficult to find clear measures or indicators to use to demonstrate progress towards achieving this objective, especially as it pertains to the County's progress with understanding the regulatory landscape. ESD will track the number of meetings attended through the two working groups -Local Gov't Sustainable Energy Coalition (LGSEC), which provides input to the rulemaking process regarding microgrids. The other is the PG&E working group for creating a Community MG Program that offers incentives/rebates, along with any progress made through these efforts. Some measurement options for the legislative piece might be: successful passage of legislation, or State and Federal funding to support local MG.

Data important to collect from a logistical standpoint: A clear understanding of where microgrids can be placed through utility maps, distribution and transmission lines. Community resiliency for low-income/ hard-to-reach communities that would benefit from a microgrid. Community microgrid size, types of housing involved, amount of power utilized, look where grid repair may be needed, previous PSPS locations, high and very high fire zones, etc. Overlay in GIS of these data points.

Information that needs analysis: Identify where investment in MG would provide the greatest benefit/highest need. CBOs and local municipalities should be involved in needs analysis.

COORDINATION & PARTNERSHIP

If progress is made through the legislative effort or if funding becomes available, the County will leverage partnerships with cities and community partners to advance the overall objective.



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COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

Given that regulations and legislation will be needed to ease restrictions for installing these types of systems throughout communities, it is uncertain how feasible they will be to implement. We will engage the public as needed and provide support for the community through legislative and regulatory efforts.

The criteria considered will prioritize community MG in vulnerable, low-income, hard-to-reach communities that are likely to be affected by factors disrupting the electric grid in their area. An influencing factor will be the electric grid structure, placement of lines, distribution points, etc.

Community MG should not consider fossil fuel driven MG. They should be from a more sustainable, renewable source.

FUNDING

In seeking external funds to leverage County funds, we plan to engage local legislators in the process to increase support for state and federal funding. Potential funding to “support” community MG could be used to leverage any state, federal or utility funding that could cover a portion of the installation of a community MG. Some funding may also be considered for staff to research and submit grant requests, provide legislative support and/or consultants to provide support to changing regulatory restrictions concerning community MG.

Los Guilicos Campus Micro Grid

Function Area:
Justice Services

Strategic Plan Impact:

Request: R210015

Department/Division:
Probation /

Project Description



FIRE RESILIENCY and RECOVERY PROGRAM: Design new micro grid power generation and storage system for Los Guilicos Campus to provide power during power outages. Project is connected to R210009 PRO-Juvenile Justice Center Power. NEW TO CIP THIS YEAR.

Project Cost	
Acquisition:	0
Design/PM:	30
Construction:	0
Furniture/Reloc:	0
Other:	100
Project Total:	130
Current Phase:	DESIGN

Operation and Maintenance Cost	
Utilities:	588
Maintenance:	772
Other:	0
OM Total:	1,360
Replacement Value:	N/A
RI Cost:	N/A
RI:	N/A

Service Impact:

Available Funding Sources	Prior FYs	Current FY	FY1 2020-21	FY2 2021-22	FY3 2022-23	FY4 2023-24	FY5 2024-25	5YR Total	Future YRs	Project Total
Unfunded	0	0	130	0	0	0	0	130	0	130
TOTALS:	0	0	130	0	0	0	0	130	0	130

All Values are presented in Thousands (1 x 1000)

GS-County Administration Campus Micro Grid

Function Area:
Administrative and Fiscal Services

Strategic Plan Impact:

Request: R210016

Department/Division:
General Services / Energy & Sustainability

Project Description



FIRE RESILIENCY and RECOVERY PROGRAM: In order to maintain power on the County Administration Campus during emergency power outages, replacement of the fuel cell and 12KV loop with new micro grid power generation and storage is proposed. First phase is design. New Andover Control System (R210026) to be funded in order for this Administration Campus Micro Grid project to proceed.
NEW TO CIP THIS YEAR.

Project Cost	
Acquisition:	0
Design/PM:	50
Construction:	0
Furniture/Reloc:	0
Other:	100
Project Total:	150
Current Phase:	INIT

Operation and Maintenance Cost	
Utilities:	862
Maintenance:	1,106
Other:	0
OM Total:	1,969
Replacement Value:	N/A
RI Cost:	N/A
RI:	N/A

Service Impact:

Available Funding Sources	Prior FYs	Current FY	FY1 2020-21	FY2 2021-22	FY3 2022-23	FY4 2023-24	FY5 2024-25	5YR Total	Future YRs	Project Total
Unfunded	0	0	150	0	0	0	0	150	0	150
TOTALS:	0	0	150	0	0	0	0	150	0	150

All Values are presented in Thousands (1 x 1000)



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CLIMATE ACTION AND RESILIENCY

- Goal 2** Invest in the community to enhance resiliency and become carbon neutral by 2030
- Objective 2** Provide \$20 million in financing by 2026 that incentivizes property managers and renters to retrofit existing multi-family (MF) housing towards achieving carbon neutral buildings.
- Lead(s)** Jonathan Kadlec, Jane Elias

IMPLEMENTATION IDEAS AND PROJECTS

The Sonoma County Energy Independence Program (SCEIP) currently has \$36M available in funding capacity. Based on the current net rate of program growth and provided the County Treasury and Sonoma Water continue their current level of investment in the SCEIP, planning for and budgeting \$4M of the available financing capacity per year over the next five years with an emphasis of improving MF housing stock to achieve carbon neutrality through SCEIP financing is feasible. This funding is available for property owners to access financing for SCEIP assessment improvements. This objective will be achieved through a multi-pronged marketing campaign including outreach, collaboration, and leveraging of multiple programs offered through the Energy and Sustainability Division that offer combined financing, incentives and rebates offered to property manager's or renter's improvements that can be done affordably. All efforts will be tracked by the Division and results reported out regularly. The Division will also look to leverage any other resources related to multi-family improvements. The approach will also include forming partnerships in order to reach capacity.

The Sonoma County Energy Independence Program (SCEIP) will offer financing to allow property owners to retrofit existing multi-family properties using SCEIP property tax assessment financing. We will work with partners and County resources to identify viable multi-family housing owners and property managers. Outreach will be conducted via email and direct mail to multi-family housing owners and property managers to provide resources related to achieving carbon neutral buildings.



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Disadvantaged communities will be identified (by geography and income overlays) to reach tenants. Through partner relationships, we will develop ideas on how we can better support tenants in making improvements or supporting their conversations with their landlord. Forum(s) will be facilitated to connect renters and landlords for a listening session to understand barriers. Funding availability and guidance available through BayREN Multi-family. The Bay Area Multifamily Building Enhancements program is administered by ESD for Sonoma County. The program provides property owners with incentives and no-cost consulting services for switching from gas fueled space heating, water heating and cooking appliances to cleaner, highly efficient electric alternatives. The Clean Heating Pathway is designed for properties that wish to demonstrate climate leadership by deeply reducing the carbon emissions from energy use in their buildings. We will also provide trainings (virtual or in-person) to provide education of why these improvements make sense.

Proposed high-level timeline and milestones:

- December 2021 – identify viable multi-family housing owners and property managers
- January – March 2022 – perform outreach via email and direct mail to multi-family housing owners and property managers to provide resources related to achieving carbon neutral buildings.
- March-May 2022 – facilitate forum to connect renters and landlords for a listening session to understand barriers. Initial funding availability and guidance is expected to be available through BayREN Multi-family.

METRICS

Tracking progress: It is difficult to find clear measures or indicators to use to demonstrate progress towards achieving this objective, especially as it pertains to the County's progress with understanding the regulatory landscape. ESD will track the number of meetings attended through the two working groups -Local Gov't Sustainable Energy Coalition (LGSEC), which provides input to the rulemaking process regarding microgrids. The other is the PG&E working group for creating a Community MG Program that offers incentives/rebates, along with any progress made through these efforts. Some measurement options for the legislative piece might be: successful passage of legislation, or State and Federal funding to support local MG.

Data important to collect from a logistical standpoint: A clear understanding of where microgrids can be placed through utility maps, distribution and transmission lines. Community resiliency for low-income/ hard-to-reach



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communities that would benefit from a microgrid. Community microgrid size, types of housing involved, amount of power utilized, look where grid repair may be needed, previous PSPS locations, high and very high fire zones, etc. Overlay in GIS of these data points.

Information that needs analysis: Identify where investment in MG would provide the greatest benefit/highest need. CBOs and local municipalities should be involved in needs analysis.

COORDINATION & PARTNERSHIP

If progress is made through the legislative effort or if funding becomes available, the County will leverage partnerships with cities and community partners to advance the overall objective.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

Given that regulations and legislation will be needed to ease restrictions for installing these types of systems throughout communities, it is uncertain how feasible they will be to implement. We will engage the public as needed and provide support for the community through legislative and regulatory efforts.

The criteria considered will prioritize community MG in vulnerable, low-income, hard-to-reach communities that are likely to be affected by factors disrupting the electric grid in their area. An influencing factor will be the electric grid structure, placement of lines, distribution points, etc.

Community MG should not consider fossil fuel driven MG. They should be from a more sustainable, renewable source.

FUNDING

In seeking external funds to leverage County funds, we plan to engage local legislators in the process to increase support for state and federal funding. Potential funding to “support” community MG could be used to leverage any state, federal or utility funding that could cover a portion of the installation of a community MG. Some funding may also be considered for staff to research and submit grant requests, provide legislative support and/or consultants to provide support to changing regulatory restrictions concerning community MG.



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CLIMATE ACTION AND RESILIENCY

- Goal 2** Invest in the community to enhance resiliency and become carbon neutral by 2030
- Objective 3** Partner with educational institutions, trade associations, businesses and non-profit organizations to establish workforce development programs that focus on carbon neutral and resilient building technologies by 2023.
- Lead(s)** Katie Greaves
-

IMPLEMENTATION IDEAS AND PROJECTS

This objective has not yet been started as we are waiting for two things:

- the federal Infrastructure Bill to be approved by Congress and funded
- State funding to be released for local workforce development projects focusing on green building technologies

In the meantime, HSD and the EDB are researching existing workforce development programs focused on the myriad resilient building technologies currently in the market as well as up and coming; these will be outlined in a white paper targeted for completion in early December 2021. HSD is also deepening its partnership with the Energy and Sustainability Division of General Services to be able to leverage its well established network of partners and programs to pinpoint specific occupations in demand along with potential industry partners for a workforce development program. Specifically, for example, HSD will attend a partner meeting in December to discuss this strategic plan objective and to harvest ideas that are both impactful and feasible.

Additionally, HSD is actively scanning for information about upcoming funding opportunities and is well poised to work collaboratively with members of the Workforce Investment Board representing myriad building and trade unions, higher education and the Economic Development Board to put forward funding applications.

METRICS



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Initial indicators demonstrating progress will be funding application submitted on behalf of local consortium described in previous sentence. This indicator will be replaced by funding received and project scoped with additional metrics of success which will be largely determined by the funder.

Longer term data important to collect will be number of businesses within target field in operation locally, number and type of positions seeking skilled workers, number of individuals trained in target jobs, number of individuals placed in target jobs, amount of federal funding leveraged per vacancy filled, demographic and other data showing opportunities elevated for historically excluded job seekers. Between the HSD and the EDB, these data are anticipated to be feasible to gather.

COORDINATION & PARTNERSHIP

This objective will be implemented in partnership with Human Services, the Economic Development Board, General Services, educational institutions, trade associations, businesses and non-profit organizations to be determined.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

The public will be engaged through social media and other media as implementation moves towards recruitment of participants for the workforce development program. Additionally, the program(s) will be marketed to high school students through their Career Technical Education programs and counselors. The target population of all Job Link workforce development programs are youth and adult individuals who have been locked out of economic prosperity due to having barriers such as low education, disability, poverty, limited English, etc. The workforce development program proposed for implementation in this objective will follow suit and prioritize training spots for individuals with barriers to otherwise accessing this type of opportunity.

Job Link services are provided both virtually and in person and system navigation staff are already situated in community based organizations located in all five supervisorial districts.

This objective is focused on creating pathways to good jobs that address the climate crisis. Implementation of the objective will take into consideration impacts to the climate in the design of the workforce development program, using remote means, for example, when possible to minimize vehicle travel to and from the training site.

FUNDING



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As mentioned above, HSD is actively scanning for information about upcoming funding opportunities and is well poised to work collaboratively with members of the Workforce Investment Board representing myriad building and trade unions, higher education and the Economic Development Board to put forward funding applications.

If new funding does not materialize, the Plan B strategy will be to develop a cohort-based training program in conjunction with trade associations and an educational institution, such as SRJC, leveraging existing funding within the education institution, e.g. Strong Workforce funding at SRJC, and within the Job Link system, e.g. Workforce Investment and Innovation Act (WIOA) funding. This would be a less reliable way to go with this objective because of the uncertainty about and lack of control over various funding sources.

It is too early to define the scope of this workforce development program and therefore to estimate the costs of, including temporary or permanent staff. The period of January through June 2022 will be used to produce the second deliverable, a proposal with scope, costs, partners, funding, etc. or a Brief summarizing the research done and decisions made if such a project is not able to be carried out. For example, if there is not a clear market demand for skilled labor in resilient building technologies because the demand is already being met through other market solutions.



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CLIMATE ACTION AND RESILIENCY

- Goal 3** Make all County facilities carbon free, zero waste and resilient
- Objective 1** Design or retrofit County facilities to be carbon neutral, zero waste and incorporate resilient construction techniques and materials.
- Lead(s)** Keith Lew

IMPLEMENTATION IDEAS AND PROJECTS

Reducing the County's climate footprint has been a Board of Supervisors objective since the early 2000's. New technologies and the opportunity to replace or retrofit existing County buildings create the potential for the County to design for carbon neutrality, zero waste and more climate-resilient facilities. Following the 2018 Deferred Maintenance report, the Board of Supervisors directed staff to research program needs and investigate possible scenarios for replacing or moving the County's main administration facilities and specifically identified climate objectives. These Board priorities have been incorporated into the scope of work for the campus replacement.

Design standards need to be developed to specifically define the performance criteria for net-zero waste, water, and energy. Once standards are adopted by the Board of Supervisors all new tenant improvement projects and capital construction projects will implement the new standards. With Board approval, the New County Government Center project will integrate triple-net zero design and operations principles.

New County Government Center

Intrinsic to the goals and aims of the New County Government Center project is integrating "triple net-zero" strategies for waste, water and energy. These design goals will be clearly specified for interested Public Private Partnership (P3) respondents when the Request for Qualifications is issued. In the winter of 2021 these design standards will be further refined in the process of drafting the solicitation documents. The iterative design process



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will also consider service delivery efficiency, cost efficiency and workplace excellence, and will, inform a new standard to be adopted for future office renovation projects in county owned and leased facilities.

The new County Government Center buildings will fulfill the Board's sustainability goals and objectives to achieve net zero energy, waste and water. The 2022 Title 24 Energy and CalGreen Building Codes will be used as a baseline to achieve compliance with the mandatory building code requirements. Additional green building standards, including US Green Building Council (USGBC) Leadership in Energy and Environmental Design (LEED) certification program or the International Living Future Institute (ILFI) Living Building Challenge Zero Carbon Certification, Zero Energy and Zero Carbon standards, will be evaluated, decided upon and incorporated in design concepts. New Building Institute resources for Zero Net Energy building design will also be utilized, including resources developed for other ZNE projects in San Diego County and Triple Net Zero University of California projects. Projects may choose to achieve equivalency with one or more (or a combination) of these referenced standards. The New Buildings Institute Getting to Zero resources for municipalities will also assist in our development of policies for new construction projects.

All capital improvement projects within County government buildings (whether new construction or renovation) are permitted by Permit Sonoma and must be consistent with building code requirements including Title 24 described below. CSU and other jurisdictions have adopted de-carbonization design guidelines that the County may want to review and consider adopting, such as the following, as described in the appendix to this plan. Major activities and approximate timelines following a design-build-finance-operate-maintain procurement delivery model for the new County Government Center include:

Procurement for developer	Q1 CY 2022
Conclude negotiations with preferred developer	Q2 CY 2024
Design and CEQA	Q2 CY 2024
Construction	Q3 CY 2025
Occupancy	Q1 CY 2028

Current preparatory activities for the new County Government Center procurement include further definition of a "Triple Net Zero" standard for the design, construction and operation of new facilities. This effort includes an analysis of strategies to achieve "net zero" status in energy, water and waste that may be incorporated in an achievable and cost effective manner. Performance requirements will be established in which to measure



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projected and actual performance. This analysis will also evaluate currently available third party rating systems for adoption through the current Ad Hoc Committee supporting the County Government Center project. The system will support a successful future certification that appropriately aligns with Sonoma County values and goals, we will provide an initial assessment and scorecard of up to two rating systems. Potential rating systems for assessment include:

1. USGBC's LEED V4/4.1
2. International Living Future Living Building Challenge (Core, Petal, or Full)
3. WELL Building V2 Standard
4. Center for Active Design's Fitwel V2.1

The County implemented an aggressive composting program in County offices in partnership with Recology in 2019. The County is preparing to expand composting to detention facilities including MADF, NCDF and Juvenile Justice Facility that will also include capturing edible food in the waste cycle.

Existing Buildings

In addition to the New County Government Center project, the Board has approved the County's participation in PG&E's Sustainable Solutions Turnkey (SST) program. In this program the County will obtain "investment grade" audits of the energy and water use in our existing buildings and will create an Energy Master Plan (EMP). A list of recommended projects to improve energy efficiency, provide battery storage, generate renewable energy, reduce water use and increase resilience with a goal of achieving carbon neutrality in the existing buildings will be brought to the Board for consideration early in 2022. SST identified projects can be financed via on-bill financing or via annual capital budget financing.

Initial discussions with PG&E indicate there are several opportunities in existing buildings in which energy performance improvements may be made. Proceeding with investments in existing buildings are mindful of the improvements ability to realize cost savings even if a building or property would be sold within a specified period. Potential cost savings will be identified in the investment grade audit to demonstrate scope feasibility.

Sufficient investment in ongoing maintenance is essential for efficient building operation, particularly for HVAC and mechanical/electrical systems. General Services tracks the completion rate of preventative maintenance and monitors on a monthly basis as an indicator of facility "health." If not properly maintained building systems are not



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capable of consistently meeting the energy conservation metrics articulated in the various codes and standards described above.

As in new facilities, a third party evaluation system will be considered for implementation. Evaluation of a third party rating system will consider applications to existing buildings. This third party rating system will provide focus on renovations in existing buildings and practices in operations and maintenance. Such as system could include LEED v4.1 for Existing Buildings: Operations and Maintenance. LEED for Existing Buildings: O&M provides a set of performance standards for certifying the operations and maintenance of existing commercial, institutional buildings and high-rise residential buildings. The performance standards address issues such as site maintenance, water conservation, indoor air quality, energy saving programs, recycling facilities and programs, and green cleaning. Areas that may be measured include:

- Green cleaning: meant to reduce the exposure of building occupants and maintenance personnel to hazardous chemical and containments which can be harmful to human health and the environment.
- Water Efficiency, intended to monitor water consumption of plumbing fixtures and their quantities.
- Materials and Resources: intended to evaluate materials that are purchased for the building and to identify more environmentally friendly alternatives. Projects are encouraged to work with suppliers to identify environmentally preferable products that meet the needs of the building.

METRICS

Net Zero Energy: Energy saved, measured against baseline use.

Along with the key milestones normally tracked in capital programs, environmental benchmarks will be established by calculating the current carbon footprint resulting from operations. The County needs to complete a new greenhouse-gas (GHG) inventory for government operations. Once we have updated data we will be able to measure progress towards reduced emissions. It is critical to identify climate objectives in solicitation documents to guide design/build/operations. The General Services tracks electrical use by building in some cases and by campus in other cases. We are able to use this baseline information to track progress towards net zero energy as electrical generation and storage is brought online.

However, without an updated GHG inventory from existing operations there will not be sufficient data available to benchmark progress towards reduced emissions.



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Net Zero Water: The amount of water saved from reduced water use in existing county facilities.

General Services tracks water use metered on either a campus or building by building basis via sub-meters. This data will assist in determining progress towards reduced water use.

Net Zero Waste: Tons of compost diverted from landfills; tons of recycling diverted from landfills.

Progress towards net zero waste will be evaluated by considering waste diversion. Composting can be measured by number of tons of waste diverted from the waste stream to composting. Currently accurate data is not available due to reduced building populations during the pandemic.

For existing buildings metrics tracking improvement from existing utility use can be made following the:

- Investment Grade Audits in the Board approved SST program. The audit will consider life cycle cost of an improvement with potential energy savings to determine whether this improvement should be recommended for implementation.
- LEED v4.1 Existing Buildings Operations and Maintenance: Baselines will be established for measurement.

COORDINATION & PARTNERSHIP

This objective has direct impacts on several other objectives including:

- RI 1.2 Standards for Office improvements: The new CGC will establish standards that can be applied to existing offices;
- RI 2.3 Design and build a new, resilient Emergency Operations Center (EOC): The new EOC will be part of the procurement for the new CGC;
- CAR 2.3 Design or retrofit County facilities to be carbon neutral, zero waste and incorporate resilient construction techniques and materials: design standards for the CGC will be carbon neutral;
- CAR 3.3 Carbon Eliminating Microgrid: As part of CGC's Triple net-zero goal energy independence and self-generation concepts will be utilized.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS



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Environmental studies, which include opportunities for formal public outreach and public comment, in addition to community and stakeholder engagement processes are planned for the new County Government Center project.

The new County Government Center project will support partnerships with cities and community stakeholders by ensuring fully accessible in-person facilities and remote access systems. Its proximity to other County services will support increased direct access by residents and build social capital through delivery of services.

Staff will work with leads in the Racial Justice and Social Equity Pillar to address the social equity considerations that could be part of the facility needs assessment and design.

FUNDING

The County Government Center (CGC) project will be delivered through a Public-Private Partnership (P3) via a design-build-finance-operate-maintenance agreement. In this model, a developer/concessionaire leverages private financing for the project, for which the County makes annual payments for a specified term. The GCC financing plan is yet to be determined but the Deferred Maintenance fund is likely to be a significant part of the plan. The developer may have access to Federal funds including Transportation Infrastructure Finance and Innovation Act (TIFIA) or new infrastructure programs in development.

As described above, triple net zero objectives can be accomplished in existing buildings after identification and prioritization using on-bill financing, or capital funding. Although triple net zero buildings may require a higher up-front investment, over a building life-cycle the operating costs are less than a traditionally designed building. Environmental objectives for building performance have many different standards with different levels of investment required for each. Staff will present policy options for future Board consideration, and as the County Government Center and other projects are advanced.

APPENDIX: Applicable Standards, Codes and Laws

Title 24 CA Building Code 2022 Title 24, Part 6 Building Energy Efficiency Standards (Energy Code or Title 24, Part 6)

Title 24 CA Building Code, Part 11 CalGreen Code



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Potential Reach Codes, in effect, at the time of permitting

California Zero Net Energy Building Goals

- All new commercial construction in California will be zero net energy or equivalent to zero net energy by 2030
- 50% of existing commercial buildings will be retrofit to ZNE by 2030
- All new state buildings and major renovations shall be ZNE by 2025¹

California Greenhouse Gas Reduction Target

- 40% below 1990 levels by 2030

California's Renewable Electricity Goals

- **2006** – AB 32 Global Warming Solutions Act of 2006; California greenhouse gas reduction to 1990 levels by 2020
- **Sept 2008** (January 2011 Update) - California Long-term Energy Efficiency Strategic Plan (CEESP)
- **4-25-12**- Executive Order B-18-12 & Green Building Action Plan
- **4-29-2015**-Governor Brown's Executive Order B-30-15; Established a California greenhouse gas reduction target of 40 percent below 1990 levels by 2030; further reduce such emissions to 80 percent below 1990 levels by 2050
- **October 7, 2015** – **SB 350**; Established California's 2030 greenhouse gas reduction target of 40 percent below 1990 levels. Increases California's renewable electricity procurement goal from 33 percent by 2020 to 50 percent by 2030.
- **2016 Update** - California Existing Buildings Energy Efficiency Action Plan

Energy Efficiency

- American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE) 2019 Section 90.1
- Institute of Electrical and Electronics Engineers (IEEE) 2009

¹ Generally building code requirements for State facilities are the same as local government facilities.



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- International Energy Conservation Code (IECC) 2012 <https://www.iccsafe.org/products-and-services/i-codes/code-development/iecc-2024-and-beyond/>
- International Green Construction Code (IGCC) 2021 <https://www.aspe.org/pipeline/2021-international-green-construction-code-is-released/>

Living Building Challenge Certified - <https://living-future.org/lbc/>

Leadership in Energy and Environmental Design (LEED) – <https://www.usgbc.org/leed>

Water

- State agencies shall reduce water use at the facilities they operate by 20% by 2020, as measured against a 2010 baseline.
- Green Building Action Plan – For Implementation of Executive Order B-18-12
- References: Executive Order B-37-16; SB X7-7 2009; Water Conservation Act of 2009

Waste

- In 2011, AB 341 established a statewide goal of 75 percent recycling through source reduction, recycling, and composting by 2020.
- January 1, 2017: Businesses that generate 4 cubic yards of organic waste per week shall arrange for organic waste recycling services.
- January 1, 2019: Businesses that generate 4 cubic yards or more of commercial solid waste per week shall arrange for organic waste recycling services.
- References:
 - Governor Brown's Executive Order B-30-15
 - AB 341, Chesbro. Solid waste: diversion
 - AB 1826, requires businesses to recycle their organic waste on and after April 1, 2016

County Government Center Facility Planning

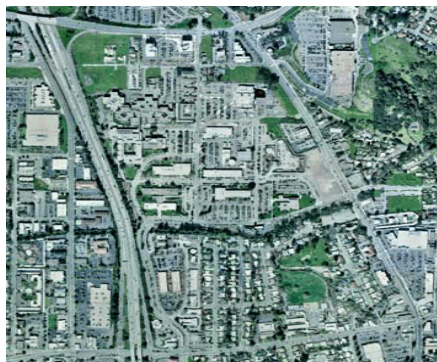
Function Area:
Administrative and Fiscal Services

Strategic Plan Impact:

Request: R150038

Department/Division:
General Services / Facilities Development and Management

Project Description



FIRE RESILIENCY and RECOVERY PROGRAM: The FY 13/14 Comprehensive County Facilities Plan determined that three quarters of the County's facilities on the main campus are beyond useful life. Space constraints on the County Government Center campus have prevented consolidation of administrative functions.

Solutions include evaluating and planning for construction of a new approximately 500,000 square/foot multi-story office building to house County Administrative services with new parking. Preliminary estimated costs for construction of a new County campus is \$500 million at the County Center.

Also included as part of the overall planning is a phased consideration for a new Emergency Operations Center, New Morgue, Public Health Lab, and new parking garage. See Planning projects R200027, R200026, and R210017.

Project Cost	
Acquisition:	0
Design/PM:	7,815
Construction:	954,170
Furniture/Reloc:	0
Other:	1,830
Project Total:	963,815
Current Phase:	INIT

Operation and Maintenance Cost	
Utilities:	1,175
Maintenance:	1,940
Other:	0
OM Total:	3,116
Replacement Value:	561,065
RI Cost:	216,702
RI:	0.36

Service Impact:

Asset replacement. Net savings of O&M costs if implemented.

Available Funding Sources	Prior FYs	Current FY	FY1 2022-23	FY2 2023-24	FY3 2024-25	FY4 2025-26	FY5 2026-27	5YR Total	Future YRs	Project Total
General Fund	5,897	2,197	0	0	0	0	0	0	0	8,094
Unfunded	0	0	191,144	191,144	191,144	191,144	191,144	955,721	0	955,721
TOTALS:	5,897	2,197	191,144	191,144	191,144	191,144	191,144	955,721	0	963,815



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CLIMATE ACTION AND RESILIENCY

- Goal 3** Make all County facilities carbon free, zero waste and resilient
- Objective 2** Design or retrofit County facilities that promote and maximize telework to decrease greenhouse gas emissions generated by employee commutes
- Lead(s)** Keith Lew, Jane Elias

IMPLEMENTATION IDEAS AND PROJECTS

Reducing the County's climate footprint has been a Board of Supervisor's objective since the early 2000's. New technologies and the opportunity to replace or retrofit existing County buildings create the potential for the County to design for carbon neutrality, zero waste and more climate-resilient facilities and operations. Following the 2018 Deferred Maintenance report, the Board of Supervisors directed staff to research program needs and investigate possible scenarios for replacing or moving the County's main administration facilities and specifically identified climate objectives including remote work. These Board priorities have been incorporated into the scope of work for the campus replacement.

Over the past 18 months as the campus replacement planning activities progressed the impacts of the Pandemic required departments to rapidly implement telework in order to reduce the potential for the transmission of the virus. In order to continue to deliver vital services to the public, departments were required to assess, adjust, and assess again the effectiveness of telework and consider functions that are more effectively delivered in-person in County facilities versus telework. Although department assessments are ongoing, these work arrangements mirror work arrangements of many private sector workplaces in a "hybrid workplace" where a portion of employees work full time in the office and the balance work remotely for at least some of their total weekly workinghours. The focus of this initiative is on the space planning that supports remote work.



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Space planning and design efforts to support a hybrid workplace include “Workplace engagement” to help guide the design for these new facilities. Workplace engagement seeks to understand the nature of the relationship between an organization and its employees, and how best to engage employees to be effective and do their best work. Hybrid workplaces include standard sized work stations for full-time staff and reduced sized work stations for teleworking staff since teleworkers have their primary workplace at home or in non-County facilities. As a key factor in creating a positive work environment, successful workplace design must be deliberate. This process will identify a range of solutions to match the different on-site/remote patterns of staff, as well as their collaboration and interaction. This process will include employee satisfaction surveys both before, during, and after design to provide benchmarks, confirm accommodation, validate goals, and measure improvements. Workplace Engagement seeks to provide quality space, tools, and amenities for staff to successfully function wherever they are.

In conjunction with Workplace Engagement will be the further refinement of the County’s Telework Policies, as necessary. The County’s Telework Policy is currently in development and will be subject to further review and negotiation with bargaining group representatives at the appropriate time. The final Telework Policy has potential to modify any workplace standards and policies that may be established.

For Existing buildings, it is envisioned that the design process for the New County Government Center will establish standards that may be applied to existing County facilities and leased buildings as renovations are performed. The design process for new CGC will entail development of multiple concepts for workplace design that will include an inclusive development of various space layouts and furniture options, user feedback to facilitate work processes and ensure equity, concept revisions and acceptance. Ensuring that the policy is inclusive will be an intensive effort intended to apply design concepts and standards to existing facilities to the fullest extent possible to achieve equity in all spaces whether new, existing or leased. This would also create a process that would facilitate renovations and modifications.

Major activities and approximate timelines following a design-build-finance-operate-maintain procurement delivery model for the new County Government Center include:

Procurement for developer	Q1 CY 2022
Conclude negotiations with preferred developer	Q2 CY 2024
Design and CEQA	Q2 CY 2024



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Construction	Q3 CY 2025
Occupancy	Q1 CY 2028

METRICS

Pre and post design and post occupancy employee satisfaction surveys of current and new workplace provisions will measure level of improvement from occupant perceptions. Existing service delivery measures for each department can measure improvements to productivity following implementation of new workplace provisions. Workplace Engagement practices may be applied to new facilities and existing facilities. New space planning practices and policies that support remote work are intended to improve operational and service efficiencies, and also reduce the emissions from employee commutes.

The County needs to complete a new green-house-gas (GHG) inventory for government operations. Once we have updated data we will be able to measure progress towards reduced emissions – including those for employee commute. Employee commute is the single largest contributor of GHG in the County's overall emission's profile as previously studied and reported to the Board of Supervisors. Strategies that reduce employee commute emissions such as ride-share, carpool, transit use, bicycle and pedestrian as well as remote work need to be considered to effectively reduce commute related emissions.

The County has previously studied transit ridership and found that a very small percentage, less than 2%, of the overall employee population uses transit. Although somewhat concentrated in Santa Rosa, the county employee population is geographically dispersed. Therefore remote work has the greatest potential at this time to reduce GHG emissions.

Departments currently are able to track payroll data that illustrates whether employees are working remotely or on-site. Trends in the overall payroll data illustrating increased remote work will be important metrics to track.

COORDINATION & PARTNERSHIP

This objective has direct impacts on the following other objectives:

- RI 1.2 Standards for Office improvements: The new CGC will establish standards that can be applied to existing offices
 - RI 2.3 Design and build a new, resilient Emergency Operations Center (EOC):. The EOC will be part of the procurement for the new CGC
-



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- CAR 2.3 Design or retrofit County facilities to be carbon neutral, zero waste and incorporate resilient construction techniques and materials.: design standard for the CGC will be carbon neutral
- CAR 3.3 Carbon Eliminating Microgrid: As part of CGC' s Triple net-zero goal energy independence and self-generation concepts will be utilized.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

One of the goals of the new County Government Center is to establish equity in the assignment of workplaces. The 2012 Service Delivery Vision for County Real Estate prepared by Gensler Architects noted a wide disparity in the allocation of space for each employee. Current workstations range in area between 30 square feet to 350 square feet, averaging 275 usable square feet per person with no consistent correlation to staff position. The new County Government Center will seek to attain a more efficient space allocation and establish a consistent policy in which to allocate space for work stations. Such equity would be codified in a Space Utilization Standard to be prepared for Board Approval. As design progresses for County Government Center, other design considerations may be implemented and adopted through Standards for Office Improvements that may include (but not limited to):

- Maximizing access to natural light and ventilation;
- Prioritizing space for people rather than storage;
- Reserving windows for common use rather than private office;
- Balancing workstation sizes within the space utilization standard to provide employee amenities such as break rooms and kitchenettes.

To ensure there are equitable provisions to telework, replacement of current desktop computers should consider replacement with laptop devices that are more mobile and can be easily taken between telework sites and the office. The replacement of computers may be accomplished through the existing computer refresh program where units are replaced regularly.

The County's representative bargaining units have been engaged in discussions regarding Remote Work policies

FUNDING



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The County Government Center (CGC) project will be delivered through a Public-Private Partnership (P3) via a design-build-finance-operate-maintenance agreement. In this model, a developer/concessionaire leverages private financing for the project, for which the County makes annual payments for a specified term. The GCC financing plan is yet to be determined but the Deferred Maintenance fund is likely to be a significant part of the plan. The developer may have access to Federal funds including Transportation Infrastructure Finance and Innovation Act (TIFIA) or new infrastructure programs in development.

As described above, triple net zero objectives can be accomplished in existing buildings after identification and prioritization using on-bill financing, or based upon available capital funding. The design and review process of the CGC project will serve to establish standards that can be applied to existing buildings remaining after completion of new facilities and leased facilities.

Telework has been accomplished using both County provided and personally owned computer equipment. For greater flexibility, future purchase of County computers could consider issuance of laptops in lieu of desktop computers. Laptops may be used between remote worksites and County facilities for teleworking staff. Computer equipment is regularly changed every three years to ensure reliable systems. Computer refreshes are funded by each department. Cost of laptops are approximately \$1,000 higher per unit. County departments should consider applying savings achieved via smaller on-site footprint costs toward increased their budgeted costs by \$350 per year per unit to cover replacement with laptops in a three year period.



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CLIMATE ACTION AND RESILIENCY

- Goal 3** Make all County facilities carbon free, zero waste and resilient
- Objective 3** Invest in County owned facilities, establishing carbon-eliminating microgrid technology and improving energy grid resilience to reduce the impact of power loss during power shutdowns and natural disasters (floods, fires, earthquakes), prioritizing critical infrastructure such as command and communications facilities.
- Lead(s)** Keith Lew, Jane Elias

IMPLEMENTATION IDEAS AND PROJECTS

General Services has undertaken a number of Board of Supervisors approved planning projects to promote microgrid technology at County facilities. Microgrids are systems that incorporate on-site electric power generation, with battery storage, and other systems that allow the connected facilities to isolate from the electrical grid thereby providing sustainable, secure, stable power. As a best practice standard, prior to the design and installation of renewable energy and battery storage systems, energy audits and studies are typically performed.

Energy conservation, renewable energy, and battery storage projects at County properties are managed through the capital project management process with leadership from the Energy and Sustainability Division during the planning phases, through Capital Projects Division once the projects have received funding, and finally supported by the Facilities Operations (FacOPS) Division once constructed and operating. The department has pursued incentives and opportunities to use on-bill financing and power purchase agreements to finance the cost of installing microgrid systems and their component parts.

In April, 2020 the Board of Supervisor authorized staff to enter into a contract with Pacific Gas and Electric (PG&E) to enable participation in their Sustainable Solutions Turnkey (SST) an energy services contract based program. Staff thereafter negotiated the and finally executed an agreement under delegated authority in October 2021.



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PG&E's energy contractor will conduct a preliminary assessment followed by detailed Investment Grade Audits of existing facilities starting in the late Winter and early Spring of 2022. Staff will work with PG&E to prepare an Energy Master Plan and with prioritized project recommendations for future Board consideration likely in the FY 23-24 fiscal year budget process.

In addition to the Board's authorization of the SST Program, previous direction was provided in June of 2020, for General Services Energy and Sustainability Division to apply for Self Generation Incentive (SGIP) funds. This funding helps to offset the cost of battery storage at various County properties. Staff submitted funding reservations and the County secured three incentive reservations for the installation of renewable energy systems coupled with energy storage capacity on the County Campus, La Plaza and at the Santa Rosa Veteran's Hall. A fourth SGIP reservation was submitted and secured for the Los Guilicos campus to add battery storage to the existing solar systems. Design work on the microgrid systems is on hold waiting for the SST program to complete the Energy Master Plan and audits necessary to determine the electrical loads.

- **Energy Master Plan:** The County is partnering with utility Pacific Gas and Electric (PG&E) through their Sustainable Solutions Turnkey (SST) program. The first task to PG&E will be the development of an Energy Master Plan where the overarching goals of carbon neutral energy sources and resilient power sources in the advent of disaster and power shutoffs. This master plan will provide a phased approach to implementation of a meeting County governments energy needs in an affordable unified manner while attaining energy independence and resiliency goals. Projects identified for advancement will be prioritized based upon available funding or financing through incentive programs or power purchase agreements, and with consideration for return on lifecycle cost investment.
- **County Campus Microgrid** - The objective is to reduce/minimize grid dependence with significantly reduced carbon impacts, and ensure resilient power during disasters. The project will be advanced in order to secure the SGIP incentive either independently as necessary due to time limits or as part of the Energy Master Plan. The County Campus microgrid will support the loads generated from the justice facilities (MADF, Sheriff's buildings, BHHU) and other facilities likely to remain on the administration campus. The County has received an SGIP incentive of \$1,145,620.00 that will provide 8.37 MWh of battery storage for the campus. In addition, the County anticipates that solar PV parking canopy could generate 1.6 MW to supply the batteries.



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- **Los Guilicos Campus Micro-grid:** The objective is to reduce/minimize grid dependence with significantly reduced carbon impacts, and ensure resilient power during disasters. The project will be advanced in order to secure the SGIP incentive either independently as necessary due to time limits or as part of the Energy Master Plan. There is a 5% refundable application fee that will need to be paid in advance. The County has paid the reservation fee of \$55,520 and received an incentive of \$1,110,400 that will provide 2.44 MWh of battery storage for the campus. The campus already has two solar electric systems in place that can generate power to supply the battery system.

METRICS

Metrics for each of the above mentioned implementation projects include:

Existing County Campus Micro-grid:

- Adherence to masterplan requirements
- Adherence to project schedule, scope and budget
- Measurement of power demand and energy production compared to the Fuel Cell
- % reduction in kWh usage and kW demand
- % reduction in utility costs

Los Guilicos Campus Micro-grid:

- Adherence to project schedule, scope and budget
- Incorporation of currently leased and owned PV systems to act as a unified system in providing electrical service to LG tenants
- % reduction in kWh usage
- % reduction in utility costs

COORDINATION & PARTNERSHIP



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This pillar intersects with Pillar RI 1.1, Carbon Neutral New Facilities. Electric power systems must be designed and constructed to incorporate carbon neutral goals.

This pillar also intersects with Pillar 2.2 electric Power Projects

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

As portions of the new Energy Master Plan are executed through the new CGC, the public will be engaged through a robust engagement program as required by CEQA. Pending approval, it will engage the public at several levels. Community leaders will be identified in early goal setting meetings with County leadership and engaged for discussion. Also, CEQA prescribes community meetings during scoping and public comment periods through the process. In addition, regular updates and comment periods will be provided to staff during all phases of design and construction.

The new County Government Center will support partnerships with cities and community stakeholders by ensuring fully accessible in-person facilities, remote access systems. Its proximity to other County services will support increased direct access by residents and build social capital through delivery of services.

Staff will work with leads in the Racial Justice and Social Equity Pillar to address the social equity considerations that could be part of the facility needs assessment and design

FUNDING

In April 2021 the Board authorized the General Services Director to enter into a Not to Exceed \$300,000 contingency contract with PG&E's Sustainable Solutions Turnkey (SST) Program for investment grade audits. These audits will evaluate the building systems and identify facility improvement opportunities. Should the County decide to move forward with these improvements the cost of the audits will be covered through on bill financing. Should the Board decide not to move forward with the identified improvement projects the County will be responsible for reimbursing PG&E an amount, not to exceed \$300,000, for the cost of the audits. General Services has not received any funding for these audits as we do not know yet whether the Board will chose in the future to proceed with the improvements. In addition, \$150,000 was funded through Capital Projects for the feasibility and design of a new microgrid for the county campus in response to a need to study the replacement of the inefficient Hydrogen Fuel Cell that was decommissioned in January 2021.



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County Campus Micro-grid: Partially funded in FY20/21 Capital Plan with \$130,000. These funds were for initial planning. The campus micro-grid would include battery storage and solar PV. A Self-Generation Incentive Program (SGIP) incentive for Energy Storage System has been reserved that will partially cover the costs of battery system. The Sustainable Solutions program can help fund the renewable energy systems to support the microgrid. Staff have estimated that approximately 1MW of solar PV parking canopy would offset the loads generated by the County campus justice facilities. Without the SST program a 1 MW solar PV parking canopy system is expected to cost approximately \$5M. These estimates for system sizes, loads, and costs will be updated upon completion of the investment grade audits. The existing Board approved funds are anticipated to help offset the staff costs supporting the investment grade audit (IGA) including design and calculations. Staff will return to the Board with results of the IGA and proposal to fund the construction of the renewable energy portion of the micro-grid through a recommended funding strategy.

Los Guilicos Campus Micro-grid: Partially Funded with \$130,000 in FY20/21 Capital Plan Self-Generation Incentive Program incentive for Energy Storage System has been reserved that will cover partial costs of battery system. The funds are anticipated to cover the costs of performance of the investment grade audit (IGA) including design and calculations. Staff will return to the Board with results of the IGA and proposal to fund the construction of the micro-grid through a recommended funding strategy.

County Government Center Facility Planning

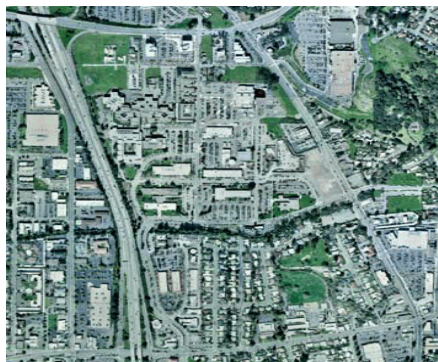
Function Area:
Administrative and Fiscal Services

Strategic Plan Impact:

Request: R150038

Department/Division:
General Services / Facilities Development and Management

Project Description



FIRE RESILIENCY and RECOVERY PROGRAM: The FY 13/14 Comprehensive County Facilities Plan determined that three quarters of the County's facilities on the main campus are beyond useful life. Space constraints on the County Government Center campus have prevented consolidation of administrative functions.

Solutions include evaluating and planning for construction of a new approximately 500,000 square/foot multi-story office building to house County Administrative services with new parking. Preliminary estimated costs for construction of a new County campus is \$500 million at the County Center.

Also included as part of the overall planning is a phased consideration for a new Emergency Operations Center, New Morgue, Public Health Lab, and new parking garage. See Planning projects R200027, R200026, and R210017.

Project Cost	
Acquisition:	0
Design/PM:	7,815
Construction:	954,170
Furniture/Reloc:	0
Other:	1,830
Project Total:	963,815
Current Phase:	INIT

Operation and Maintenance Cost	
Utilities:	1,175
Maintenance:	1,940
Other:	0
OM Total:	3,116
Replacement Value:	561,065
RI Cost:	216,702
RI:	0.36

Service Impact:

Asset replacement. Net savings of O&M costs if implemented.

Available Funding Sources	Prior FYs	Current FY	FY1 2022-23	FY2 2023-24	FY3 2024-25	FY4 2025-26	FY5 2026-27	5YR Total	Future YRs	Project Total
General Fund	5,897	2,197	0	0	0	0	0	0	0	8,094
Unfunded	0	0	191,144	191,144	191,144	191,144	191,144	955,721	0	955,721
TOTALS:	5,897	2,197	191,144	191,144	191,144	191,144	191,144	955,721	0	963,815

GS-County Administration Campus Micro Grid

Function Area:
Administrative and Fiscal Services

Strategic Plan Impact:

Request: R210016

Department/Division:
General Services / Energy & Sustainability

Project Description



FIRE RESILIENCY and RECOVERY PROGRAM: In order to maintain power on the County Administration Campus during emergency power outages, replacement of the fuel cell and 12KV loop with new micro grid power generation and storage is proposed. First phase is design. New Andover Control System (R210026) to be funded in order for this Administration Campus Micro Grid project to proceed. NEW TO CIP THIS YEAR.

Project Cost	
Acquisition:	0
Design/PM:	50
Construction:	0
Furniture/Reloc:	0
Other:	100
Project Total:	150
Current Phase:	INIT

Operation and Maintenance Cost	
Utilities:	862
Maintenance:	1,106
Other:	0
OM Total:	1,969
Replacement Value:	N/A
RI Cost:	N/A
RI:	N/A

Service Impact:

Available Funding Sources	Prior FYs	Current FY	FY1 2020-21	FY2 2021-22	FY3 2022-23	FY4 2023-24	FY5 2024-25	5YR Total	Future YRs	Project Total
Unfunded	0	0	150	0	0	0	0	150	0	150
TOTALS:	0	0	150	0	0	0	0	150	0	150

All Values are presented in Thousands (1 x 1000)

Los Guilicos Campus Micro Grid

Function Area:
Justice Services

Strategic Plan Impact:

Request: R210015

Department/Division:
Probation /

Project Description



FIRE RESILIENCY and RECOVERY PROGRAM: Design new micro grid power generation and storage system for Los Guilicos Campus to provide power during power outages. Project is connected to R210009 PRO-Juvenile Justice Center Power. NEW TO CIP THIS YEAR.

Project Cost	
Acquisition:	0
Design/PM:	30
Construction:	0
Furniture/Reloc:	0
Other:	100
Project Total:	130
Current Phase:	DESIGN

Operation and Maintenance Cost	
Utilities:	588
Maintenance:	772
Other:	0
OM Total:	1,360
Replacement Value:	N/A
RI Cost:	N/A
RI:	N/A

Service Impact:

Available Funding Sources	Prior FYs	Current FY	FY1 2020-21	FY2 2021-22	FY3 2022-23	FY4 2023-24	FY5 2024-25	5YR Total	Future YRs	Project Total
Unfunded	0	0	130	0	0	0	0	130	0	130
TOTALS:	0	0	130	0	0	0	0	130	0	130

All Values are presented in Thousands (1 x 1000)



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CLIMATE ACTION AND RESILIENCY

- Goal 4** Maximize sustainability and emissions reductions in all County Fleet vehicles
- Objective 1** Where feasible, phase out County (owned or leased) gasoline powered light-duty cars, vans, and pickups to achieve a 30% zero-emission vehicle light-duty fleet by 2026.
- Objective 3** Upgrade the existing County owned Electric Vehicle charging station infrastructure by 2023.
- These are combined because they are so closely related and have the same implementation strategy*
- Lead(s)** Tony Tsui
-

IMPLEMENTATION IDEAS AND PROJECTS

Fleet Operation's approach to implementation will ultimately maximize sustainability and emissions reductions by moving towards replacing carbon producing fleet vehicles with zero-emission electric vehicles (EVs), and facilitating their operations by upgrading and expanding charging infrastructure at County owned and leased properties.

The Fleet Operations Division has already conducted and completed the first phase of a fleet electrification study with an outside vendor, Green Light Labs, to help inform the recommendations in their "Fleet Electrification Report". This report initially evaluates the financial, environmental, and charging infrastructure impacts of electrifying 81 vehicles due for replacement in FY21-22 (the "Replacement Vehicles") and provides a high-level overview of electrification potential for the County's entire fleet (CAR 4.1). Should all the Replacement Vehicles in this initial study be converted to EVs, the County has the potential to save as much as 320 metric tons of CO2 annually. The report provides some additional details on supporting these Replacement Vehicles as EVs to include the potential locations for charging stations (CAR 4.3), the types of charging equipment required (CAR 4.3), and the possible candidate EVs to support each usage case (CAR 4.1).



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The next step (pending funding) is to expand Fleet Operation’s bandwidth by providing additional staffing support through a Program Manager and Senior Office Assistant. These individuals will help conduct and complete the second, more in depth, phase of the fleet electrification study with Green Light Labs, which will inform a Fleet Transition Plan. This plan will help Fleet Operations determine the optimal time and strategy for implementing EV charging infrastructure (CAR 4.3) and deploying EVs (CAR 4.1). As part of the second phase, Green Light Labs will also work with Fleet Operations to develop a campaign to include software tools and workforce EV training to help County employees prepare for the transition to EVs (similar to their campaign for Los Angeles County – see www.electrifyze.la). Beyond these items, Green Light Labs has the ability to provide (at an additional cost) an assessment of incentives and grant opportunities to secure funding and resources, and develop a plan to capture Low Carbon Fuel Standard (LCFS) credits.

Once the Fleet Transition Plan is conducted, completed, and reviewed, implementation of the findings will occur as quickly as possible; along with some gasoline powered vehicles being replaced with EVs or PHEVs during FY21-22. The implementation of EV charging infrastructure (CAR 4.3) will be critical towards accomplishing both objectives (CAR 4.1 and 4.3). Without a place to “refuel” (charge) EVs effectively and efficiently, adoption of County Fleet EVs (CAR 4.1) will be severely hindered – bottlenecking EV adoption until more charging infrastructure is in place. With the appropriate charging infrastructure due to be in place to support new EVs, CAR 4.1 progress has the potential to occur very rapidly. The transition of County vehicles to EVs should, therefore, ideally occur simultaneously to the installation of new charging infrastructure. The Program Manager and Senior Office Assistant will then maintain specific oversight on servicing and repairing existing refueling and charging infrastructure and help to inform the ongoing implementation of new infrastructure and the capability of supporting more EVs. Additionally, the Program Manager and Senior Office Assistant will continually seek and apply for new funding sources and opportunities to ensure longevity of the infrastructure.

List of planned major activities, projects, and efforts:

- Conduct first phase of fleet electrification assessment with Green Light Labs to inform Fleet Electrification Report (CAR 4.1 and 4.3)
 - Hire a Program Manager and Senior Office Assistant to provide bandwidth for refueling and charging infrastructure (CAR 4.1 and 4.3)
-



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- Conduct second phase of fleet electrification study with Green Light Labs to inform Fleet Transition Plan (CAR 4.1 and 4.3)
- Implement workplace EV Awareness/Education campaign (CAR 4.1)
- Implement EV charging infrastructure informed by Green Light Labs reports (CAR 4.3)
- Maintain refueling and charging infrastructure (CAR 4.3). This includes servicing and repairing existing infrastructure and informing the implementation of new infrastructure.
- Seek and apply for new funding sources and opportunities (CAR 4.1 and 4.3)
- Create new vehicle request forms to offer opportunities for departments to choose EVs (CAR 4.1)
- As usage cases allow, create vehicle bid specifications that capture EVs (CAR 4.1)

Major Activities / Projects	Approximate Timelines and Milestones
GLL: Fleet Electrification Report (Phase I)	Completed April '21
New Vehicle Request Forms	Completed June '21 -- Distribution Fall '21
Future Vehicle Purchases Informed by GLL Report	FY21/22 and Beyond
Recruitment Program Manager	December '21 / January '22
Recruitment Senior Office Assistant	January '22
GLL: Fleet Transition Plan (Phase II)	Winter 21/22
Employee EV Education Campaign	Winter 21/22 (Campaign to be on demand)
Portable EV ARC Solar Chargers	Winter 21/22



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Stationary EV Charger Planning & Optimization	Spring '22 and Ongoing (Pending funding availability)
Maintain EV Infrastructure	Ongoing
Bid Specifications	Ongoing

METRICS

Important data to collect and track to develop good measures and/or indicators:

- Number / Percentage of PHEV/EV in overall County Fleet (CAR 4.1)
- Number of EV chargers installed for County Fleet (CAR 4.3)
- Metric tons of CO₂ (GHG emissions) baseline and the achieved reduction (CAR 4.1 and 4.3)

Data gaps can be addressed by utilizing estimates/averages based on historical information.

COORDINATION & PARTNERSHIP

CAR 4.3 has the potential to intersect with CAR 2.1, CAR 3.1, CAR 3.3, RI 2.1, and RI 2.2. To collaborate with the Implementation Leads for that objective Fleet Operations would share all data and information obtained from our studies and progress. Since there are several options available in the implementation of CAR 4.3, the preference has been to lean towards highly adaptive and resilient infrastructure, with independence from grid power.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

Not all of the EV Charger installation projects seek to engage the public directly. Specifically, the EV ARC units provide a very noticeable addition to any site, given the size and design, and can be augmented with applicable signage / graphics to advertise their targeted use and benefits. For those Departments that are having EV Chargers installed, Fleet Operations will assist the Departments with tailored Public Service Announcements to highlight the availability of new EV Chargers for public use at differing locations.



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Green Light Labs will provide a Fleet Transition Plan that will place an equity lens through implementation of EV charging infrastructure and EV vehicle replacements (CAR 4.1 and 4.3). A portion of the report will inform the placement of EV charging infrastructure (CAR 4.3) based on vehicles due for replacement, domicile locations of those vehicles, energy requirements and capacity of potential charging sites, and the number of ports needed to support charging. The report will also provide potential EV candidates to support each department's usage case to replace their existing vehicle(s) (CAR 4.1). The replacement of County vehicles with EVs (CAR 4.1) will be dependent on the department's replacement schedules each year and their capacity to support them (informed by the department's usage case and existing/potential charging infrastructure). New EV additions to a department's fleet will be handled on a case-by-case basis, but ultimately will be determined on the existing/potential charging infrastructure for that department.

Green Light Labs will also work with Fleet Operations to develop a campaign to include software tools and workforce EV training to help County employees prepare for the transition to EVs (CAR 4.1 and 4.3). The campaign will be available on demand to allow employees equal and unrestricted access to all the same information.

FUNDING

Recommended implementation funding plan:

CAR 4.1

- Department / Fleet ACO Funds

Through a Department's participation in the Vehicle Lease Program, replacement vehicles are funded through monthly lease contributions made into the Fleet ACO Fund. When a Department reaches its vehicle replacement date, these funds will be utilized to replace their current vehicle with a zero-emission vehicle, where feasible and where usage cases will allow.

CAR 4.3

- Climate Action and Resiliency Funds
 - Year 1 Strategic Plan Implementation Funds
-



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- American Rescue Plan Act Funds
- General Funds

EV infrastructure upgrades and expansion is currently unfunded. Fleet has and will be actively seeking potential funding opportunities inside and outside of the County to help build and maintain EV infrastructure. Currently, Fleet is awaiting response on funding requests for the Climate Resilience Fund (\$2.8M) and the Year 1 Strategic Plan Implementation Fund (\$200K). Fleet has tried to leverage ARPA Funding (\$1.25M) for this project; under the NACo Guidance to replace public sector revenue loss caused by the pandemic. The proposed project under ARPA supports new infrastructure as part of the general provision of government services and makes necessary investments in the community's sustainability and emergency preparedness planning. A request was made for \$1.25M, specifically for the EV ARC Solar Chargers, however, funding was not approved because the County did not lose revenue during the pandemic. General Funds will be requested should Fleet be unsuccessful with the remaining listed funding opportunities.

Once funding is obtained, the first step would be to expand Fleet Operation's bandwidth by providing additional staffing support through a Program Manager and Senior Office Assistant. These individuals will then utilize the funding to help conduct and complete the second, more in depth, phase of the fleet electrification study with Green Light Labs, which will inform a Fleet Transition Plan. This plan will help Fleet determine the optimal time and strategy for implementing EV charging infrastructure and deploying EVs. As part of the second phase, Green Light Labs will also work with Fleet to develop a campaign to include software tools and workforce EV training to help County employees prepare for the transition to EVs. The Program Manager and Senior Office Assistant will then maintain specific oversight on ongoing servicing and repair of existing refueling and charging infrastructure and help to inform the ongoing implementation of new refueling and charging infrastructure. Additionally, they will continually seek and apply for new funding sources and opportunities to ensure longevity of the infrastructure.

Once the Fleet Transition Plan is conducted, completed, and reviewed, implementation of the findings will occur as quickly as possible; along with some gasoline powered vehicles being replaced with EVs or PHEVs during FY21-22. The implementation of EV charging infrastructure will be critical towards accomplishing both objectives (CAR 4.1 and 4.3). Without secured funding to help build out EV infrastructure complimentary to EV acquisitions, the newly acquired vehicles will be very underutilized. Therefore, the majority of the funding obtained will be used to purchase portable and stationary EV infrastructure hardware and pay for capital project costs. Funding will also be



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used to pay for the overhead costs associated with the EV infrastructure; to include EV charger network fees, maintenance, and utility costs.



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CLIMATE ACTION AND RESILIENCY

Goal 4 Maximize sustainability and emissions reductions in all County Fleet vehicles

Objective 2 Invest in the County's employee Clean Commute program to promote use of alternate modes of transportation, including bike and carpool incentives, and last mile solutions connecting bus and train stations to County worksites.

Lead(s) Katherine DiPasqua

IMPLEMENTATION IDEAS AND PROJECTS

Based on findings from the 2020 Employee Commute Survey, there are three ways we can invest in the County's Clean Commute program to promote the use of alternative modes of transportation, increase program participation, and reduce greenhouse gas emissions:

1. Provide monthly subsidies/incentives to employees who use alternate modes of transportation, including train, bus, bike, and carpool
 - A. Pilot Clean Commute Incentive Program [Spring 2022]
 - ✓ My Commuter Check Purchases - The County would match all purchases made through the County's pre-tax commuter benefit platform, My Commuter Check, dollar for dollar up to \$40 per month. This includes purchases of SMART passes and Clipper eCash. The My Commuter Check incentive would not be able to be combined with the Bus, Carpool and Bike incentive, even if the monthly match is below \$40.
 - ✓ Bus, Carpool, and Bike - The County would provide a \$240 taxable incentive for employees who take the bus, carpool, or bike to work at least 60 days within a 6-month reporting period. This incentive would be paid out twice a year for eligible employees, for a maximum of \$480 per year. The 60 days can be achieved through a combination of bus, carpool, and biking.



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- B. Improve bus service to County worksites [Late 2022/ Early 2023]
 - ✓ The County Administrator's Office would coordinate with Sonoma County Transit and Santa Rosa City Bus to increase bus service to County worksites.
- C. Improve last mile connections between SMART stations and other transit centers and County worksites [Spring 2022]
 - ✓ Create a last-mile connection for County employees between the SMART Santa Rosa North Station on Guerneville Road to the County Campus using County electric fleet vehicles. Prior to COVID, I was coordinating with General Services Real Estate staff to negotiate a lease with a property owner next to the SMART station for parking spaces. We would resume discussions with the property owner and establish a SMART Last Mile Pilot Program. The goal of the Pilot Program would be to determine best practices and create user guidelines, and then eventually expand the program to the Airport area.
 - ✓ Work with SCTA to establish a bike share station on the County Campus for both employees and the public to use.

METRICS

I will use the Clean Commute program participation levels as the measure of progress towards achieving this objective. Previously, I was tracking participation levels manually, but in July 2020 the County of Sonoma was awarded a grant from the Metropolitan Transportation Commission (MTC) for the MTC SHIFT program. The SHIFT program aims to reduce the number of vehicles on the road and to improve air quality by partnering with large employers to equip them with commute management platforms to help manage their employees' commutes. The Clean Commute Online Platform will allow the County to expand its Clean Commute program by helping match employees who are interested in carpooling, providing employees with trip tracking tools, administering incentives to encourage the use of alternate forms of transportation, collecting ridership data and reporting on greenhouse gas emission reductions.

The Clean Commute Online Platform has been designed and tested and will be launched in conjunction with HR's Telework Policy in December 2021. As part of the telework agreement requirements, County employees who work from home will be required to log their telework days in the Clean Commute Trip Tracker.



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COORDINATION & PARTNERSHIP

This objective intersects with the Organizational Excellence objective below. As mentioned above, the Clean Commute online platform will be launched in coordination with the County's Telework Policy and employees will be required to log their work from home days into the trip tracking tool.

Goal 3: Become an employer of choice with a diverse workforce that reflects our community, and an employer with a positive work culture that results in engaged and developed employees.

Objective 1: Implement programs and identify opportunities to support employee work-life balance and a positive work environment, including a Telework Policy.

Because this objective is an internal program for employees only, I will not be engaging with cities or community partners. However, I will be engaging with outside agencies, including SCTA, SMART, Santa Rosa CityBus, and other transit partners during the roll out of the program.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

As mentioned above, this is an internal program for County employees only. I will not be engaging with the public. I will, however, be conducting an employee engagement effort to launch the Clean Commute Online Platform, and will be hosting trainings for payroll staff who will have special access to the system. In terms of equity, by including various modes of transportation into the subsidy program, we are making the program as accessible as possible. There will always be geographic equity issues with public transportation systems, but that is not within the scope of this objective. The implementation of this objective will reduce employee commute greenhouse gas emissions.

FUNDING

I will be requesting \$150,000 of funding from the \$5 million Strategic Plan Set Aside for employee commute incentives and last mile connection costs during the initial pilot period for permanent County employees. Extra help employees will not be eligible for the incentives at this time, but that can be reevaluated at the end of the pilot period depending on interest levels. The length of the pilot period will be dependent on the number of participants in the program, but based on comparable programs, I estimate the pilot period will last between 12 and 18 months. This



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is a one-time cost, which potentially could turn into an ongoing annual expenditure if the program is successful. There are no impacts to staffing.

The Clean Commute program is funded with General Fund dollars budgeted in the Transportation Fringe Benefit account in Non-Departmental. This account funds the free SCT and Santa Rosa CityBus pass programs and Clean Commute incentives/raffles. This account also pays for the County's portion of the Clean Commute Online Platform annual hosting costs. The remaining portion is funded through a grant from MTC.

In the event the Board does not fund this objective, there would be sufficient funds in to cover the SMART Last Mile Pilot Program, and potentially a small new raffle incentive program, but it would not cover the proposed \$40/month subsidy program.



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CLIMATE ACTION AND RESILIENCY

- Goal 5** Maximize opportunities for mitigation of climate change and adaptation through land conservation work and land use policies
- Objective 1** By 2025, update the County General Plan and other county/special district planning documents to incorporate policy language and identify areas within the County that have the potential to maximize carbon sequestration and provide opportunities for climate change adaptation. The focus of these actions will be to increase overall landscape and species resiliency, reduce the risk of fire and floods, and address sea level rise and biodiversity loss.
- Lead(s)** Misti Arias, John Mack and Mike Thompson

IMPLEMENTATION IDEAS AND PROJECTS

In order to outline an implementation for this objective, it is necessary to unpack the nested tasks and subtasks included in Objective CAR-5.1. The overall objective includes updating the General Plan as well as other county department and special district "planning documents" by 2025.

The plan updates required by CAR-5.1 can be summarized in four sub-objectives:

- 1) 5.1.1: Develop new "policy language", e.g., General Plan polices or policies in other planning documents
 - 2) 5.1.2: Identify geographic areas of the County that
 - a. have the "potential to maximize carbon sequestration" and
 - b. could provide "opportunities for climate change adaptation."
 - 3) 5.1.3: Focus the "policy language" and the "opportunities" in 2b on
 - a. increasing overall landscape resiliency,
-



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- b. increasing overall species resiliency,
- c. reducing the risk [of loss of life and property from] fire and floods,
- d. addressing sea level rise,
- e. addressing biodiversity loss, and
- f. addressing climate-change related drought (this is not listed but is presumably an oversight related to the disasters occurring when the strategic plan was drafted).

The County geographies identified in 2a and 2b could be coterminous, that is overlapping or they could be geographically separated depending on the climate change adaptation opportunity. For example, an area identified for sea level rise adaptation may or may not also have a carbon sequestration potential.

- 4) 5.1.4: Identify opportunities for early integration and implementation of existing ecological uplift efforts that could result in carbon sequestration and/or climate change adaptation benefits.
- a. Ag + Open Space, Permit Sonoma, and Sonoma Water would independently identify their priority efforts associated with carbon sequestration, climate change adaptation, and ecological uplift.
 - b. Ag + Open Space, Permit Sonoma, and Sonoma Water would work together to identify opportunities for synergistic overlaps in their efforts that could lead to increased benefits in the effectiveness, reach and timing of their efforts.

In summary, the implementation plan for this objective will require Ag + Open Space, Permit Sonoma, and Sonoma Water to identify and map landscapes that will maximize carbon sequestration opportunities in the County, develop policies to implement the identified sequestration opportunities, develop climate change mitigation policies on the topics in 5.1.3(a to f), and identify opportunities for early on the ground implementation of projects that address this objective.

Finally, the specification to "maximize" in the Goal (i.e., maximize opportunities for climate change mitigation) and Objective (i.e., identify areas that will maximize carbon sequestration) requires the ability to, among other things, 1) rank and compare the effect of policy choices on overall carbon neutrality, 2) identify and rank County landscapes with higher versus lower carbon sequestration potential; and 3) identify landscapes with higher versus lower risks listed in 5.1.3(a to f) based on different County-scaled climate scenarios. *Thus, to develop science driven policies that have assurance of being effective, a fundamental prerequisite to implementing this objective is a data*



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synthesis and modeling task that will need to be completed to develop County-scaled carbon emissions models with agreed baselines as well as landscape models for carbon sequestration potential. Additionally, a parallel effort should be pursued to capitalize on opportunities to increase the climate adaptation/sequestration value of existing Ag + Open Space/Sonoma Water/Permit Sonoma efforts through collaboration.

This approach will help to achieve the pillar goal to "Maximize opportunities for mitigation of climate change and adaptation through land conservation work and land use policies" by developing relevant, specific policies that should result in land conservation and other climate-change mitigation activities.

Prerequisite Data Synthesis and Modeling Task

As discussed above, using existing data and models develop an agreed carbon budget and baseline at the County scale to provide a firm, science-based foundation for making effective policy and project choices. In addition, County-specific landscape models should be developed to determine relative carbon sequestration potential of various natural, agricultural and developed landscapes. Existing data and models should be leveraged or scaled to be County specific. Information from state and regional models, the Vital Lands Initiative, and quantification by the Sonoma County Climate Action Authority, and other published sources should be synthesized and scaled to be County specific.

Ag + Open Space

The Vital Lands Initiative adopted by the Board should provide the foundation for identifying landscapes that maximize carbon sequestration potential in the County. The existing mapping and prioritization in the Initiative can be operationalized linking the landscape characterization, mapping, and ranking already performed for Sonoma County to the carbon models developed in the Prerequisite Task above to identify the landscapes with the best potential for sequestration.

Sonoma Water

SW should lead roles in water resource management, drought response and flood management.

This includes synthesizing existing surface and groundwater data to develop policies for resiliency in face of drought, leading water supply, wastewater, and flood control infrastructure protection for expected increased flood size, duration, frequency given climate change, and developing data, models, plans, policies for 5.1.3 topics (especially flood and drought) which can form basis for General Plan update polices.



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Permit Sonoma

Permit Sonoma should lead in the General Plan Update. They plan to develop data-driven, specific policies around each topic in 5.1.3, and create land use designations for landscapes with high carbon sequestration potential to maintain, protect, and improve the sequestration potential of those landscapes. In all plan and grant proposals initiated after the adoption date of the strategic plan, Permit Sonoma will incorporate measures to ensure consistency with this strategic plan.

Collaboration

Ag + Open Space, Sonoma Water and Permit Sonoma will work collaboratively to identify synergistic overlaps in projects and programs that are currently being developed for to achieve some early implementation results.

METRICS

The ultimate measures/indicators would relate to measured or modeled reductions in carbon emissions or increases in carbon sequestered. However, this objective is highly focused on policy and plan development and modeling and mapping priority sequestration landscapes. So, deliverable schedules will be the main indicator of progress. As discussed above, to develop science driven policies that have assurance of being effective, a fundamental prerequisite to implementing this objective is a data synthesis and modeling task that will need to be completed to develop County-scaled carbon emissions models with agreed baselines as well as landscape models for carbon sequestration potential.

With regard to water resources, surface/groundwater studies are currently in progress or are planned in coordination with the United States Geologic Surveys. These studies are planned to be finalized by 2023. Sonoma Water working with the Natural Resources Conservation Service to update the Central Sonoma Watershed Project, which protects much of the City of Santa Rosa from flooding. This update is expected to be completed in 2025.

COORDINATION & PARTNERSHIP

Sonoma Water and Ag + Open Space are currently engaged in an effort to increase collaboration amongst organizations involved in managing, protecting, and enhancing watersheds in Sonoma County. The initial partners are the North Coast Regional Water Quality Control Board, the Sonoma Resource Conservation District, and the Gold Ridge Resource Conservation District. This collaborative effort is aimed at increasing the collective



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understanding of each partner's goals and priorities, and to seek opportunities that could increase the effectiveness of such efforts as the Ag + Open Space's Vital Lands Initiative and Sonoma Water's water supply resilience and stream management programs.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

Public engagement would occur as an integral part of planning for specific projects or programs. The breadth of actions being addressed by the Permit Sonoma, Ag + Open Space, and Sonoma Water cover a wide range of geographical areas. As an example, addressing flooding associated with climate change is anticipated to provide the greatest benefits to disadvantaged areas of Sonoma County.

FUNDING

Funding for the Data Synthesis/Modeling Study will be needed. A round-figure estimate would be \$500-750K for this task. Implementation leads are partnering with the new Climate Action and Resilience Division within the County Administrator's Office to request funds for this piece through the Strategic Plan funds.

Funding for the General Plan Update and specifically to develop policies outlined above will be needed. The General Plan Update process has some funds allocated to it. Other required by this objective would need to be funded.

Ag + Open Space has had a history of leveraging local funding with State, Federal, and private foundation funding sources. These practices, which maximize the benefit from locally funding, will continue to be implemented. Ag + Open Space will also use sales tax dollars for mapping and policy development and will not need to request additional funding from the Board at this time.

Sonoma Water will be receiving funding or in-kind services from NRCS for the update of the Central Sonoma Watershed Project. Funding from the USGS, and drought resiliency funding from the state is also being sought for water supply resiliency studies. Funding will also be derived from water rates and flood control tax funding.



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CLIMATE ACTION AND RESILIENCY

- Goal 5** Maximize opportunities for mitigation of climate change and adaptation through land conservation work and land use policies
- Objective 2** Develop policies to maximize carbon sequestration and minimize loss of natural carbon sinks including old growth forests, the Laguna de Santa Rosa, and rangelands. Encourage agricultural and open space land management to maximize sequestration. Develop a framework and policies to incentivize collaboration with private and public land owners.
- Lead(s)** Misti Arias

IMPLEMENTATION IDEAS AND PROJECTS

The Board adopted The Vital Lands Initiative (Vital Lands) earlier this year. Vital Lands outlines the importance of land conservation in carbon sequestration and avoiding emissions and adapting to climate change and extreme events (Vital Lands, pages 43-44) and includes results of recent studies showing the importance of both Land Conservation and Smart Growth (Vital Lands, page 53). Vital Lands includes Guiding Principles, Universal Objectives, and Strategies and tools aimed at mitigating climate change, such as:

- Guiding Principles – Ensure that all Ag + Open Space actions support resilience to climate change and extreme events and the avoidance or reduction of greenhouse gas emissions
 - Universal Objectives – Protect areas important for climate change and extreme event resiliency and adaption, including projects that promote carbon sequestration and avoided emissions and enhance biodiversity
 - Healthy Communities Objectives – Continue sustainable and climate friendly agriculture where appropriate on recreational lands.
-



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- Strategies and Tools – Integrate Climate Change and Extreme-event Resiliency. Moving forward, staff will integrate the best available science and data about climate change and extreme events into all aspects of Ag + Open Space work, including project prioritization, easement design and stewardship, fee land management, and agency operations.

Based upon this adopted guiding document, Sonoma County Ag + Open Space will lead an effort to set ambitious and specific targets for the amount and type of lands needed to be conserved to be resilient to climate change. This effort will also include tools and approaches that encourage and incentivize land management practices which maximize sequestration, natural function, and resiliency to climate change and extreme events. This work will be accomplished in collaboration with other County agencies, departments, and community partners. Specific actions to further this objective include:

- Develop a climate adaptation plan with a focus on natural systems by end of 2022
- Develop an agricultural climate adaptation plan, “Elevating and Valuing Agriculture’s Role in Climate Mitigation and Adaptation Planning” by mid 2023
- Identifying specific, measurable targets for land conservation to ensure climate resiliency by mid 2022 and modify as needed after completion of climate adaption plans
- Outreach to landowners within high priority regions to encourage permanent land protection and enhanced management by end of 2022
- Acquire conservation easements over a diversity of lands that sequester carbon and support adaption to climate change – on-going
- Provide landowners with incentives to implement land management practices that increase carbon sequestration and the health of natural systems – on-going
- Adopt land use policies that encourage and direct city centered growth and conservation of natural and working lands through the General Plan update

METRICS

Performance metrics will include:

- Completion of natural systems and agricultural adaptation plans
 - Percentage of high priority lands protected
-



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- Percentage of land conservation projects that also include enhanced land management practices
- Types and amount of regenerative agriculture activities implemented
- Amount and diversity (habitat, topographic, climate etc.) of land conserved
- Development of landowner resources about best management practices and available funding sources
- Amount of land enhanced/restored
- Amount of carbon sequestered, including avoided conversion and increased capacity

In order to measure performance, staff will identify baseline data and protocols for measuring carbon sequestration. The adaptation plans will help identify the highest priority lands and management practices and staff will identify specific targets to measure success in implementation of these plans. Once targets are established, staff will track actions taken to implement these plans. Staff will track the amount of land conserved including diversity of vegetation types, habitats, topography, and microclimate and how these relate to identified targets.

COORDINATION & PARTNERSHIP

This objective overlaps with objectives in the Healthy and Safe Communities, Racial Equity and Social Justice, and Resilient Infrastructure. Staff will ensure collaboration with implementation leads for these objectives by gathering input for policy development and standards for best management practices. Ag + Open Space will incorporate new General Plan policy direction into criteria for identifying high priority land conservation projects.

Successful implementation of this objective will require close collaboration with a wide variety of partners. For Policy development, the Climate Action and Resilience Program will partner with Permit Sonoma, the Regional Climate Protection Authority, incorporated cities and town, Sonoma County Department of Agricultural and local agricultural and environmental organizations. For land conservation efforts, Ag + Open Space will partner with Sonoma Land Trust, Save the Redwoods League, The Conservation Fund, The Nature Conservancy, and the Wildlands Conservancy as well as, numerous funding partners including, California Department of Fish and Wildlife, Wildlife Conservation Board, State Coastal Conservancy, State Department of Conservation (Sustainable Communities), USDA Natural Resource Conservation Service, and private foundations. For land management efforts Ag + Open Space will partner with Sonoma Water, Sonoma County Regional Parks, Sonoma County Farm



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Bureau, Community Alliance for Family Farmers, CalCAN, Resource Conservation Districts, Pepperwood Foundation, and Point Blue.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

Ag + Open Space conducted extensive outreach through the development of The Vital Lands Initiative. We heard consistently that climate resiliency should be carefully considered in our land conservation and management efforts. We are proposing to implement land conservation efforts that meet the expectations of the community. Ag + Open Space will work with present identified priority areas to the Board of Directors in a public meeting. The General Plan update will be a public process that provides ample opportunity for members of the community to provide input into climate related policies. Land conservation efforts will prioritize the protection of land that is accessible to the public in an equitable way and that is available to a diversity of farmers and ranchers for agricultural production. In addition, land conservation priorities will be based upon geographic diversity. Ag + Open Space will incorporate urban greening, urban agriculture, and equity prioritization criteria into the selection of Matching Grant Program projects. In addition, Ag + Open Space is partnering with Regional Parks to conduct a gap analysis for parks and open space throughout the county. Future park and open space acquisitions will be prioritized in areas that are identified as high priority in the analysis.

FUNDING

Ag + Open Space sales tax funds will be used to fund and leverage funding for many of the actions identified in this objective. Specifically, Ag + Open Space funds will be used to acquire conservation easements and encourage enhanced land management practices. Ag + Open Space will allocate an amount of sales tax revenue for land conservation efforts. These funds will also be used to leverage a variety of public agency and private foundation grants including, Natural Resource Conservation Service, Department of Fish and Wildlife, Wildlife Conservation Board, California State Coastal Conservancy, and Gordon and Betty More Foundation. Ag + Open Space hopes to use future Federated Indians of Graton Rancheria mitigation funding, approximately 8 million per year, to create a grant program for landowners to fund enhancement of land management practices, implementation of regenerative agriculture techniques, and restoration of natural systems. Ag + Open Space and the County intend to share the cost of the Climate adaption plan for natural systems. Funding for update of the General Plan will be needed to adopt land use policies as addressed in CAR 5-1.



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HEALTHY AND SAFE COMMUNITIES

- Goal 1** Expand integrated system of care to address gaps in services to the County's most vulnerable.
- Objective 1** Seek legislation to eliminate barriers to data sharing between Safety Net departments (Human Services, Health Services, Community Development Commission, Probation, Child Support and others) by 2023.
- Lead(s)** Marissa Montenegro

IMPLEMENTATION IDEAS AND PROJECTS

Eliminating the barriers to sharing information between safety net departments will allow increased collaboration between safety net departments to provide necessary services to the most vulnerable residents to support them toward self-sufficiency. Major activities to achieve this objective include working with impacted departments to determine current barriers to data sharing and drafting legislative language to present to Sonoma County legislators to carry forward.

Other activities include:

- Enact policy changes that enable disparate client data reportable on single system as efficiently as possible.
 - Advocate for changes in privacy and protected information related to individual Safety Net Systems, so that multiple system users can be viewed on a "golden record" by case workers.
 - Advocate for funding jurisdictions to develop cross-disciplinary strike teams enabling Safety Net Departments the ability to care coordinate and work collectively on a single client to ensure they are achieving their best outcomes.
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Timeline (2021 to 2023)

- Fall 2021 – Work with impacted departments to determine current barriers to data sharing. This is already occurring. We are drafting a one pager to share with Assembly member Wood with a request to carry the legislation.
- Fall 2021 – Draft legislative language to present to legislators
- 2022 – If bill is carried forward, monitor progress through legislative session. There is currently a patchwork of different legislation that allows limited groups access to some data for a limited amount of time (pilot programs). We want an overarching bill that will allow safety net departments to share their information via the MDTs. We want to achieve a scalable regional model.

We need long term funding for long term data sharing. Previous legislation (like whole person care, AB728) recognized the need for data sharing, provided funding for data sharing but only for limited cohorts and for a limited time. We need long term commitment so MDTs can provide long term, effective, holistic support, to the homeless and precariously housed.

- October 2022 – Following successful bill passage, develop implementation plan.

METRICS

Identified metrics are:

- Successful passage of legislation
- Program outcomes:
 - Decreased overlap in services
 - Increased coordinated supportive services to individuals with co-occurring conditions
 - Decrease in homeless and precariously housed individuals and families

COORDINATION & PARTNERSHIP



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Partnerships with cities and community partners will be developed to support the bill throughout the legislative process, as well as develop, collect and analyze program implementation metrics to support additional funding.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

- *How will you engage the public through implementation?*

Will leverage departmental (DHS, HSD...) community engagement findings to build priorities.

How will you measure the success/effectiveness of engagement approach and plans?

- Will work with department findings to build success metrics.

How will you apply an equity lens through implementation, i.e. process, engagement, etc.? Example:

- These efforts will be undertaken in collaboration with safety net departments. Equity is at the core of eliminating obstacles to data sharing between safety net departments. Eliminating data access challenges will improve services for the most vulnerable and disadvantaged community members. Work with safety net departments and Equity office to get their feedback on projects.
- *How will you ensure geographic equity, equity in service access, through implementation?*

Legislative efforts undertaken will benefit all the County communities and geographic areas.

FUNDING

This project is funded through existing resources and will not require strategic plan funding request for year 1.



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HEALTHY AND SAFE COMMUNITIES

- Goal 1** Expand integrated system of care to address gaps in services to the County's most vulnerable.
- Objective 2** Identify gaps in the Safety Net system of services and identify areas where departments can address those gaps directly, and seek guidance from the Board when additional resources and/or policy direction is needed
- Lead(s)** Angela Struckman, Tina Rivera
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IMPLEMENTATION IDEAS AND PROJECTS

Gaps in the safety net system of services are identified at the level of the Safety net collaborative which includes DHS, HSD, probation, child support, and law enforcement partners. The meetings are held on a monthly basis. These meeting serve to discuss any gaps that are being observed and reported such as for instance in the hospital system. Examples of discussions include for instance identifying whether having sobering centers is a gap.

Gaps in the safety net system of services will be addressed with two key strategies: 1) adding new multi-disciplinary cohorts; and 2) developing new technology solutions to eliminate data and referral gaps across departments. These approaches will help strengthen cross-sector partnerships and coordination of services particularly with high need clients.

DHS will improve our existing technology including new phases in ACCESS and Watson Care Manager, by working across departments— Probation, HSD, DA's office, Sheriff's office, etc. to listen and enhance our systems to communicate more efficiently and capture needed information. This work will include coordination with networks, CBO partners, and community engagement with residents to improve coordination of services and user experience. We will improve reporting structures and design reporting that meets the demand and will better inform decision making particularly for work with high needs clients.



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Depending on funding availability – new cohorts could be in place in FY 22-23, with new technology and improvements in existing technology. Planning phases are underway both with Probation and HSD. An example of new cohorts needed and discussed include Project Homekey cohort, which was recently proposed on 10/26 to assist in the gap with respect to individuals needing wrap around services in permanent supportive housing. This cohort will rely on the expertise of staff with clinical skills set as well as City staff for outreach and referral skills set. This will be an opportunity to integrate city staff in cohorts. All Permanent Supportive Housing within Sonoma County will be serviced;

Timeline

- Identification of data gaps is ongoing
- FY 21-22 - HSD/Probation discussion and planning (currently underway).
- FY 22-23 - work with IBM on data mapping and testing database needs, preparing reports, and potentially adding additional phases.
- FY 23-24 – cohort comes online, hiring staff, etc.

Utilizing new reporting features from IBM we will be able to track our progress and ensure data deliverables are met and data integrity is solid. Outcomes will be defined in the planning phase, as the cohort population is not yet identified. We will look at demographic data, geography, emergency department visits, etc., to ensure data integration is pulling the correct data and matching to the cohort, checking for special assessments and forms loaded into the system, and ensure the interface is functioning properly.

METRICS

External metrics include:

- Holding community meetings or town halls;
 - Creating publications to better inform the public on safety net services we provide, and tracking readership and attendance at community meetings;
 - Surveying the community on what else they'd like to see or know, as well as surveying the community for additional unmet needs;
 - Seek feedback from the Equity workgroup specifically on equitable service delivery and communication;
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- Translating our newsletters, and ensuring translation at public meetings, and survey

Internal metrics:

The project team will come up with on the reporting side to assess program success and data integrity.

COORDINATION & PARTNERSHIP

We will work with safety net collaborative intersects with the Racial Equity and Social Justice pillar as our highest priority is to ensure equity in access to services and supports.

Additionally this work intersects with Resilient Infrastructure as this is an infrastructure (technology) to enhance service delivery. Our shared goal is to implement technology solutions that promote resilience by providing quality care for our community. We need to ensure these solutions are understood and the information is accessed by other departments to inform their decision making. We will run de-identified data and share across departments to understand who is being served, housing data, shelter bed data, demographic data, etc.; to intersect and assist departments and inform countywide targets and progress made.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

We already have established partnerships with CBOs and cities and will continue to strengthen partnerships as we form additional multi-disciplinary teams and integrate city-staff (shared meetings, more communication, etc.). We plan to hold community meetings or town halls, and create publications to better inform the public on safety net services we provide.

We are currently in the planning phase to produce quarterly publications that will circulate to Sonoma County public lists; highlighting safety net services, public health, Measure O expenditures, etc. We want to highlight collaborations and services provided in the community and celebrate successes. We will track readership and attendance at community meetings, survey the community on what else they'd like to see or know and seek feedback from the Equity workgroup specifically on equitable service delivery and communication.

Language accessibility (adding indigenous languages and other languages beyond Spanish that have not been met) is an area of focus for this work. We will need to translate our newsletters, ensure translation at public meetings, and survey community for additional unmet needs. The department is always evaluating service delivery for gaps and equitable provision of services across marginalized populations and geographic needs.



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Climate change and health inequities are interchangeable. When we think about food access, disaster response, and geographic challenges; communities of color are disproportionately impacted across the board. But we need to consider climate impacts as we implement programs addressing these health inequities and ensure same lens is used in our solutions.

We are ensuring use of iPads instead of paper for assessments when possible, we have purchased electric cars for staff to use when driving, and have cut down on driving when possible (services to high needs require in-person meetings). And the introduction of Telehealth has vastly reduced driving as well.

FUNDING

An ARPA request has been prepared for Watson and IMDT expansion (one-time) as an investment in infrastructure. Databases and cohorts do have ongoing costs and new cohorts will need ongoing staffing.

Database cost: For new IBM phases each new phase \$1.5 million. For the cohorts, funding will depend on the number of FTEs included in a cohort.

We applied for SAMSHA funding for technology (one-time) and Measure O – limited

We also anticipate funding from Mental Health Diversion Expansion.



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HEALTHY AND SAFE COMMUNITIES

- Goal 1** Expand integrated system of care to address gaps in services to the County’s most vulnerable.
- Objective 3** Create a “no wrong door” approach where clients who need services across multiple departments and programs are able to access the array of services needed regardless of where they enter the system.
- Lead(s)** Angela Struckman, Tina Rivera

IMPLEMENTATION IDEAS AND PROJECTS

Historically, the services provided by the County of Sonoma have been disparate and siloed. In 2017, the Board of Supervisors prioritized strengthening the County’s Safety Net System, to better support vulnerable residents and to develop coordinated strategies to improve their well-being, self-sufficiency, and recovery.

Sonoma County’s Safety Net departments, including Department of Health Services, Human Services Department, Community Development Commission, Child Support, Public Defender, District Attorney, Probation, Sheriff’s Office, and community-based organizations, have been working to integrate and align services to ensure that community members of Sonoma County receive coordinated care, no matter how the individual enters the Safety Net System. This “no wrong door” approach and philosophy provide a roadmap for the County to implement strategies to improve service delivery by enhancing client access to services and their experience with county Safety Net departments. The County wants to ensure that customers receive a consistently high level of service regardless of the program in which they first receive services, and that customers do not have to repeatedly enter county departments to receive the same or different services.

This “no wrong door” strategic plan objective, will build on the work of ACCESS Sonoma which established an Interdepartmental Multidisciplinary Team staffed by representatives from the Safety Net Departments to coordinate care for the most vulnerable and highest utilizers of county services as well as the County’s Upstream Investments



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initiatives, which has provided backbone and technical assistance support to multiple county/community based collaboratives and initiatives focused on expanding prevention-focused and evidence-informed interventions.

To achieve this Strategic Plan objective, the Safety Net departments have identified and will work towards achieving the following milestones over the next five years:

Goal 1: Increase Integration and/or Alignment of Services to serve each individual or family holistically and in a streamlined fashion regardless of their entry point.

Goal 2: Improve Client Experience to improve convenience, accessibility, and satisfaction with access to services. Within policy and programmatic mandates, the Safety Net departments will consider the needs and desires of clients in when, where, and how they receive benefits.

Goal 3: Reduce Service Delivery Complexity to improve access to services whether by raising awareness of services, increasing referrals or improving the referral process across Safety Net programs (where appropriate), or improving the convenience of services.

Goal 4: Realize Operational Efficiencies and adopt innovative technology to improve efficiency in service delivery where possible, and without loss of quality of services. Outcomes, performance, and a positive customer experience will provide the ultimate measure of success.

The Safety Net departments have identified three priority areas for phase one of this objective with the aimed of reducing service delivery complexity by: 1. Raising awareness of available county services and programs to county front line and lobby intake staff by providing training and education to help staffs' understanding of basic eligibility requirements of the most utilized programs across the safety net departments, 2. Develop and distribute a comprehensive resource guide to community-based organizations and Safety Net Department staff with a description and contact information of county programs to help clients navigate the many programs and services offered by the County and, 3. Leverage the county's new website redesign to restructure Safety Net department websites to be client centric and culturally responsive.

SAFETY NET DEPARTMENTS STAFF TRAINING AND NO WRONG DOOR RESOURCE GUIDE

As the County moves forward with a new model of service delivery in which each staff member is at a minimum knowledgeable of the programs and services offered by Safety Net departments, training staff on the services and programs offered by other programs will help them make better referrals for clients and build a common



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understanding of agency mandates, restrictions, opportunities and the “no wrong door” philosophy and approach. This training will be offered to all Safety Net departments’ staff via webinar or zoom at an introductory level and offered at a second, more in-depth level to staff responsible for information and referral services at the front desk or those servicing in program navigation roles. It is envisioned that training would be provided by existing staff and managers. For HSD, we would incorporate these new trainings as part of our Staff Development curriculum.

To ensure that clients can connect with other county services, a cross-departmental workgroup will be formed to support the creation of a comprehensive resource guide to help people in need and assist them in connecting with desired services regardless of the program where they are trying to gain access. The resource guide will be available on-line and as a PDF so that it can be printed and given to individual seeking assistance across county departments.

WEBSITE

HSD has already convened a department-wide content design team to redesign HSD’s landing page and division webpages. This is based on the understanding that all county departments are transitioning content to the new CMS platform. The new website (to be completed mid 2022) will serve as another portal or door to a range of services for clients and community, and will make access more equitable to clients who are not available to seek assistance during traditional County business hours. For HSD, the website became ever more vital during the recent pandemic that forced many community members to seek services online. Recent website tracking metrics show that HSD’s home page received 25,000-30,000 unique CPU visits per month. The top pages included eligibility programs for MediCal and CalFresh. HSD will take this opportunity to redesign pages to point clients to resources we anticipate they need to find quickly. Given the website’s high traffic for eligibility program content, strategies such as a chat bot or live chat feature that may help clients better navigate the intensive eligibility process could be explored as an aspect of this “no wrong door” objective to better understand the cost and effectiveness of the strategy.

Similarly, the KPMG workgroup tasked with compiling and analyzing an inventory of housing and homelessness services, identified the need to develop a website/portal to help clients, community-based organizations and county program staff access information about housing and homelessness services through a single site or virtual one-stop, allowing content to be curated and managed through a CBO/County partnership. Findings from the report and additional information gathered from surveying staff development and training staff at CDC, HSD and DHS, highlighted the need to provide cross departmental training to better connect clients to services and for county staff



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to provide a “warm-handoff” for clients seeking multiple services. These two efforts could be further leveraged as they have common aims.

Major activities, projects, and/or efforts

HSD will take the lead in collaboration with the Safety Net departments to create the work-plan and implementation strategies for year one objectives. A component of the works plan will be organized around the client experience, and will include surveys of both staff and clients to ensure client perspectives are centered. HSD will work with the other Safety Net departments to establishing an internal cross departmental workgroup to identify action steps, timelines and expected outcomes or deliverables.

HSD will assign a project lead and will work with the Planning, Research, Evaluation, and Engagement (PREE) unit to develop an evaluation plan to assess the outcome of year one objectives. PREE will also establish a communication plan to help increase both staff and client awareness of “No Wrong Door” offerings.

High-level timeline and milestones

Year	Milestones
2021-2022	<p>Start-up and Assessment Planning</p> <ul style="list-style-type: none">• HSD assigns staff lead• Lead establishes cross departmental workgroup• Workgroup will assess program access points including website, social media, phones, resource and referral, outreach collateral, staff trainings related to outreach and engagement• Conduct client focus groups to identify barriers to accessing services• Survey staff (including contracted community-based organization partners) to understand the circumstances when clients are turned away or left with unresolved needs• Create recommendations for action and an evaluation plan
2022-2023	Implementation Plan



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- Engage Staff Development to assist in the creation of training modules to train staff on services offered across Safety Net Departments
- Develop resource guide with input from program staff, clients and community partners
- Develop communications plan for staff (internal), clients and contracted community-based organization service providers (external)
- Gather feedback on the plan from contracted community-based partners, clients and Office of Equity core team
- Launches communications plan aiming to improve staff and client awareness of No Wrong Door services
- Evaluate the implementation

METRICS

The workgroup will work with Upstream Investments in utilizing the Results Based Accountability framework to develop performance measure for this project. PREE will support the group to review existing literature and available datasets to find a population level indicator related to this work and specific performance measures to document progress towards achieving the objectives in the work-plan.

The workgroup in partnership with PREE will create a data development plan to identify existing measures that may reveal the success of this improvement plan. The proposed process will include collecting metrics and establishing a key outcome Indicator list to monitor progress. Baseline measures can be established during the planning phase.

Sample metrics include:

- Website click tracking for key terms to measure how well clients virtually navigate to service information
- Program referrals completed across divisions and departments to measure how many program services are offered to clients
- # of staff completing “no wrong door” trainings about Safety Net programs
- # of client reporting positive outcomes (accomplished through client surveys)
- Time duration to access programs or services



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The Safety Net departments acknowledge that there are key gaps in data, as defined by a lack of existing data, available to assess the quality of our service coordination. Disparate data tracking systems and unique forms do not currently allow Departments to track unique clients served. Most departments currently lack the ability to track and report on client demographics, which is data that could help identify data gaps as defined by disparities. Strategic Plan objective HSC 2-3 will be working on a plan to eliminate data gaps. We will coordinate and rely on the support of that workgroup as well as the Results Based Accountability (RBA) work group who is assessing CBO's ability to collect disaggregated data for program reporting.

COORDINATION & PARTNERSHIP

HSD envisions engaging select public groups early on in the project's implementation. Contracted community partners and clients will contribute to the assessment process and implementation plan development. Regular updates will also be provided to the Board of Supervisors, which is another public communication channel.

Staff, contracted community-based partner, and client surveys will include questions measuring the success/effectiveness of the engagement approach.

Engaging clients in the project will ensure that client voices are reflected in service delivery design – client empowerment and efficacy are fundamental to advancing equity.

The Safety Net departments will work to ensure that access to information is culturally appropriate and responsive to the needs of the community including language access and insuring that information will be accessible through a variety of mediums and modalities.

HSD will use data from recent regional focus groups to inform this planning process. For example, a recent evaluation of these focus groups revealed a theme around providing more virtual and satellite supports to clients. In addition, contracted community partner and client feedback will be sought from clients representing various regions. This data can help HSD and the Safety Net departments develop an implementation plan that is inclusive of regional needs and differences.

HSD will explore virtual and phone-based client support strategies for proposed implementation. These strategies may both eliminate the transportation barrier and reduce emissions.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS



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We already have established partnerships with CBOs and cities and will continue to strengthen partnerships as we form additional multi-disciplinary teams and integrate city-staff (shared meetings, more communication, etc.). We plan to hold community meetings or town halls, and create publications to better inform the public on safety net services we provide.

We are currently in the planning phase to produce quarterly publications that will circulate to Sonoma County public lists; highlighting safety net services, public health, Measure O expenditures, etc. We want to highlight collaborations and services provided in the community and celebrate successes. We will track readership and attendance at community meetings, survey the community on what else they'd like to see or know and seek feedback from the Equity workgroup specifically on equitable service delivery and communication.

Language accessibility (adding indigenous languages and other languages beyond Spanish that have not been met) is an area of focus for this work. We will need to translate our newsletters, ensure translation at public meetings, and survey community for additional unmet needs. The department is always evaluating service delivery for gaps and equitable provision of services across marginalized populations and geographic needs.

Climate change and health inequities are interchangeable. When we think about food access, disaster response, and geographic challenges; communities of color are disproportionately impacted across the board. But we need to consider climate impacts as we implement programs addressing these health inequities and ensure same lens is used in our solutions.

We are ensuring use of iPads instead of paper for assessments when possible, we have purchased electric cars for staff to use when driving, and have cut down on driving when possible (services to high needs require in-person meetings). And the introduction of Telehealth has vastly reduced driving as well.

FUNDING

The “no wrong door” initiatives (described above) will continue operating using existing state and federal grant funding. A portion of the tasks to be undertaken during phase one will be covered through existing workloads, however strategic plan funds in the amount of \$350,000 are being requested to support coordination of partners, client engagements consultant, development and production of staff training modules and new resource guide during this phase of the project.

These projects are not eligible for ARPA funds as they are not COVID-19 related.



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HSD does not currently plan to seek external funding for this work, although HSD staff would apply for grant funding for improved client service coordination if such funding became available during the project period.

Revenue sources to support year one strategies are part of ongoing funding from state and federal sources.

Expenditures related to this project will be one time “start-up” costs or ongoing costs. Examples of one-time costs include developing the training curriculum and bulk printing of resource guide, website redesign and extra help.

Backbone staff to support this 5-year project represent another ongoing cost.

HSD will designate a PPEA within the PREE unit to serve as project lead and will work with the other Safety Net department to identify staff to help backbone the effort for the duration of the Strategic Plan.



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HEALTHY AND SAFE COMMUNITIES

- Goal 2** Establish equitable and data-driven distribution of services
- Objective 1** Safety Net departments will begin tracking data using results-based accountability (RBA) for key programs to establish common outcome measures, such as increased service access and utilization by communities of color, or decreased homelessness and poverty rates across the County.
- Lead(s)** Angela Struckman, Oscar Chavez
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IMPLEMENTATION IDEAS AND PROJECTS

In 2019, the Board of Supervisors adopted a set of Contracting Principles for safety net service programs. Subsequently, the Board of Supervisors adopted Results-based Accountability (RBA) as the approach to operationalize these principles. As a result of this adoption, the safety net departments have been working together to develop and implement a plan for applying RBA for County administered programs as well as county contracts with community-based organizations in alignment with the adopted Contracting Principles.

RBA will be used for planning, reporting, and monitoring/tracking of performance measures of County programs and contracts with plans for complete adoption in the next 3-5 years. By incorporating RBA into programs and contracted services, the County will more effectively evaluate program performance and participant outcomes. RBA will also be utilized to map where the greatest needs are for services, broken out by policy priority, region, Race/Ethnicity and other subgroupings of interest to the extent available.

RBA will help the County evaluate the effectiveness of its investments, and allow grantees to sharpen their focus in three key performance areas:



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- How much did we do?
- How well did we do it?
- Is anyone better off?

In addition, RBA provides a process and tools for transparency and accountability. RBA uses an online dashboard that will be utilized by all partners to track quarterly program progress, while connecting program-level efforts to community results and population indicators. This process places contractors alongside County departments to develop performance measures together and to build better engagement in the contracting process.

1. *How will your approach to implementation help to achieve the pillar goal?*

Safety net departments will adopt RBA at an annual increase of at least 10% for contracts above \$50,000 with full adoption by 2026 for all departments. In addition, departments and community-based organizations are provided ongoing training to support implementation. Trainings are offered quarterly for contract managers and community-based organizations.

2. *What major activities, projects, and/or efforts will your department/agency undertake to achieve this objective?*

The safety net departments have been working together to develop and implement a plan for applying RBA for County administered programs as well as county contracts with community-based organizations in alignment with the adopted Contracting Principles.

The Human Services Department, via Upstream Investments, is the managing partner for the RBA implementation plan.

A cross-department Contracting Principles workgroup representing the Human Services Department, Department of Health Services, Probation Department, Community Development Commission, and Child Support Services has been convened to support implementation, and to provide an avenue for feedback during the implementation process.

Key activities:

- Training for RBA contract managers and community-based organizations
- Development of performance measures



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- Dashboard data entry and updates
- Turn the Curve (active contract monitoring)
- RBA Workgroup
- Created and launched a data reporting system in Apricot, a cloud-based data management system, to ease reporting requirements for non-profits and County program managers
 - At the close of each fiscal quarter, organizations using RBA send performance measure data to County contract managers. Contract managers submit data for review through Apricot creating opportunity for dual data quality checks.
- Built Sonoma County Community RBA Dashboard
 - Data from Apricot is entered into the Clear Impact Dashboard to support “Turn the Curve” Conversations between the County and contracted organizations as well as to ensure broader community transparency.
 - The Dashboard aggregates contract level performance measures across the Safety Net Departments. In addition to presenting an aggregate county wide image of contract performance, the Dashboard offers aggregate details on performance measures by department and can also be used to monitor and improve individual contract outcomes.
 - The Dashboard is currently accessible only by authorized users although reports can be shared publicly. The Human Services Department will publish the Dashboard for external use in June 2022.

Lessons learned:

- Common performance measures for aggregate reporting need to be committed to and clearly stated at the beginning of the contracting process.
 - During the first round of RBA contracts, common performance measures for aggregate reporting were selected after contract performance measures were agreed on by County departments and non-profits. This offered the benefit of customizing performance measures for programs but created challenges for meaningful and accurate aggregate reporting.
 - Contracted partners need support collecting and reporting unduplicated quarterly client data sets.
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- Quarterly Turn the Curve conversations may be too labor intensive especially for County staff managing multiple RBA contracts.
 - Adopted work arounds included bi-annual Turn the Curve conversations, third quarter only Turn the Curve conversations and Turn the Curve reflections submitted through a quarterly reporting template.
 - Across departments and divisions, integrating RBA requires staffing resources that many departments/divisions do not have. This results in delayed implementation and reporting.
- Across County departments and contracted partners there is a need to create shared metrics and data collection systems for demographic data and location of service. This needs to include providing a low-cost option to collect data and training on how to collect sensitive data.

3. *What high-level timeline and milestones do you propose for these major activities, projects, and/or efforts?*

RBA will be used for planning, reporting, and monitoring performance measures for County programs and contracts with plans for complete adoption by 2026.

Milestones 2021-26

- Expand RBA training offerings for Department staff and community partners.
- Increase integration of RBA into County contracts by a minimum of 10% annually.
 - Individual Departments determine prioritization for RBA program adoption.
- Publish the Dashboard as an online reference to support Department decisions and transparent contract management.
- Establish systems to collect demographic data.
- Integrate anti-Racist RBA metrics across Safety Net Department contracts.

RBA will be used for planning, reporting, and monitoring performance measures for County programs and contracts with plans for complete adoption by 2026.

METRICS

- Percentage of contracts over \$50K using RBA;
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To maintain a manageable scope of work and ensure a broad picture of the breadth and impact of safety net department contracts, we are currently prioritizing new contracts that are \$50K or more. Ensuring a metered adoption of RBA by County departments allows staff to gradually build out the RBA Dashboard and Apricot data collection system. However, we anticipate that as we reach full implementation (*all* new safety net contracts over \$50K) there will be a tipping point when we will need additional staffing to effectively manage the workload.

RBA will be implemented in all new procurements. Existing contracts will be allowed to sunset without incorporating RBA. However, as existing contracts are renewed/refunded RBA will be incorporated.

- Number of contracts submitting quarterly data through Apricot on time;
- Clear Impact Dashboard online publication;
- Percentage of contracts reporting positive progress.

The following aggregate performance measures will be reported at the County, department, and division levels:

- How Much: # of services/programs provided county/department wide
- How Much: # of people served county/department wide by any program
- Better Off: # of people participating in a county/department program that met one or more target outcomes

As we build and expand demographic data collection systems across the safety net departments, RBA will help inform data gaps and will assist in better directing County investments to areas where there are unmet needs. However, current demographic data collection systems are lacking and will require additional resources and development to adequately collect meaningful data.

The County's RBA Dashboard will need to be aligned with the Portrait of Sonoma County indicators. This will allow the County to better understand more short-term progress of program investments related to the longer-term indicators used to calculate the Human Development Index. Safety Net departments will select and monitor data for key indicators reflective of Portrait priority areas.

A better focus on equity and the intersectionality of racial equity and social justice will need to be outlined and data desegregated appropriately. Upstream is applying an equity lens to the implementation of RBA. Resources will need to be provided to ensure community-based organizations can provide disaggregated data.



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Often organizations do not have good systems in place to collect these data. Work will also need to be done to develop appropriate subgroups. Often race and ethnicity categories are so large that disparities in subgroups get systematically ignored or hidden. In addition, a strategy must be implemented to include subgroups that historically get left out of reports because the data are too small or statistically insignificant.

As resources are made available to build and implement systems to track demographic data, a project management plan will be created with clearly articulated phases and target milestones. Programs funded by ARPA and aligned with the County's strategic plan would offer opportunities to pilot and customize these systems.

Staff resources will be needed to ensure the timely collection of quality data. If this work is embedded with current workload priorities, staff within each of the Departments will not have the time to dedicate to RBA and successfully work towards full implementation by 2026.

COORDINATION & PARTNERSHIP

This objective intersects with the Racial equity pillar. Upstream plans to integrate a racial equity lens in the RBA process by working with the racial equity consultant hired by the Office of Equity – Equity and Results. Upstream staff and committees will be provided training from Equity and Results to deepen their understanding of how a racial equity lens is being applied to the RBA work. A train the trainer model will be used, and once the training is complete, Upstream staff will be better able to integrate a racial equity lens across all RBA offerings.

Supported by the consulting firm Equity + Results, the Office of Equity and the Human Services Department are working to center equity in the County's Results-Based Accountability (RBA) work. Following the completion of the Racial Equity Learning Program, the Upstream Investments team and the Office of Equity will receive additional training and capacity building to integrate equity into the foundations of the County's RBA model. The Office of Equity will work in partnership with the Human Services Department – Upstream Investment to ensure that existing strengths and resources for CBOs are supported by the County's investment in equity professional development.

At its core, RBA offers an opportunity for better engagement between the County and funded organizations through the Turn the Curve (active contract monitoring) process. The regular check-in points give County staff and the contractor the opportunity to review data, analyze the factors that might be positively or negatively impacting the program and then make changes based on these discussions. This allows for a deeper level of collaboration that hasn't existed prior to the implementation of RBA.



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In addition, Upstream is currently contracted to support the application of RBA to the Santa Rosa Violence Prevention Partnership (City of Santa Rosa) funded programs. The City is receiving tailored technical assistance and City staff are attending the Upstream RBA trainings. Upstream is also contracted by First 5 Sonoma County to support the application of RBA to their funded programs. Staff are providing tailored technical assistance and First 5 staff and funded organizations are attending the Upstream RBA trainings.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

Upstream investments has an ongoing training calendar to support community-based organizations and other jurisdictions in the utilization of RBA. Upstream will also vet the list of indicators with community partners through the Portrait of Sonoma County update. Additionally, Upstream will annually present data from the Dashboard to articulate how well the County is doing to promote well-being in the community.

Success will be measured by improvement across performance measures in programs and services to communities of color as we are able to build out systems to accurately collect demographic data. We will also track how the data on the dashboard are being used to guide investment decisions, to inform future Board of Supervisor's strategic plans and ultimately to influence policies. In the end, the success will be based on how well County investments impact positive outcomes for community health and well-being (utilizing disaggregated data as systems are funded and developed to collect demographic data).

Detailed strategies for applying an equity lens will be developed through our work with the consulting firm hired by the Office of Equity, Equity and Results, and will be integrated into all RBA contracting processes.

The RBA framework and resulting Dashboard will have a countywide approach. The RBA work represents community-based organizations with activities spread throughout the County and serving all county populations.

Upstream will continue to use zoom for trainings. Through zoom, Upstream is able to engage geographically outlying communities who don't have to drive, reducing travel time. Upstream will continue to leverage technology for better collaboration, increased interest and attendance thanks to the new flexibility of telework for community partners. Broadly, RBA offers a mechanism to respond to challenges with program delivery due to pandemics, fires and other unusual circumstances more actively because of the regular Turn the Curve meetings. These meetings provide an opportunity for program adjustments to be made in real time.

FUNDING



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1. ARPA for community grants process for the next 3 years. 2 FTE.
2. HSD funding through Upstream Investments and ARPA
3. Aside from ARPA, external funding to leverage County funds not applicable
4. Both one-time and ongoing funds. ARPA funding is time limited and Upstream funding is ongoing through the Human Services Department. As RBA work expands and departments beyond HSD increase the number of contracts using RBA, there may be the need for departments to contribute funding to support staffing and data management systems.
5. Both one-time and ongoing expenditures. The Human Services Department's current contract with Sidekick Solutions and Apricot will support creating a system to collect aggregate demographic data. However, this will not allow for disaggregate (program level) data analysis. Additionally, broad efforts to collect and analyze demographic data countywide would require expanding the data collection system and training for County staff and partners to collect disaggregate program data. Currently, we have 2.0 FTE dedicated to ARPA work and .5 FTE dedicated to County RBA work.

No changes to staffing, 2 FTE (time-limited) already secured to support the ARPA community grants process will help execute this implementation plan.



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HEALTHY AND SAFE COMMUNITIES

- Goal 2** Establish equitable and data-driven distribution of services
- Objective 2** Develop and implement dashboard tracking tools to collect data on common outcome measures across Safety Net departments by 2026.
- Lead(s)** Angela Struckman, Oscar Chavez
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IMPLEMENTATION IDEAS AND PROJECTS

To support effective RBA implementation and data collection of common outcome measures across the safety net departments, the County adopted the Clear Impact Dashboard to support departments contracting with CBOs to standardize data collection and reporting, improve contract performance and measure progress over time. The Dashboard tracks county wide indicators reflective of the five safety net departments (Human Services, Health Services, Probation, Community Development Commission and Child Support Services) and aggregates contract level performance measures across the five departments. In addition to presenting an aggregate county wide image of contract performance, the Dashboard offers aggregate details on performance measures by department and can also be used to monitor and improve individual contract outcomes. Upon publication in June 2022, the Dashboard will also support transparent contracting practices.

Through metered adoption of RBA, the safety net departments are in the process of integrating performance measure reporting and monitoring into all contracts with community partners over \$50,000. The Human Services Department created data reporting forms in Apricot; a cloud-based data management and reporting platform to streamline the data collection process. At the close of each fiscal quarter, organizations using RBA to monitor and support contracted services send performance measure data to County contract managers. Contract managers submit data for review through Apricot creating opportunity for dual data quality checks. Data from Apricot is entered into the Clear Impact Dashboard where it is available to support Turn the Curve Conversations (active contract management meetings)



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between the County and contracted organizations as well as to ensure broader community wide transparency of county investments.

While contract level performance measures are program specific, each contract includes a measure reflective of the following three criteria which will be reported in the Dashboard.

1. How much did we do?
2. How well did we do it?
3. Is anyone better off?

These contract specific measures aggregate to the following department and county level measures:

4. How Much: # of services/programs provided county/department wide
5. How Much: # of people served county/department wide by any program
6. How Well: # of people completing a county/department program
7. How Well: % of people completing a county/department program
8. Better Off: # of people completing a county/department program that met one or more target outcomes
9. Better Off: % of people completing a county/department program that met one or more target outcomes

After one year of implementation, eight County contracts are reporting data in the Dashboard, with an additional 23 anticipated to begin reporting in FY 2021-22. At this time, all departments have submitted draft community wide indicators to represent their work. Indicators will be finalized by November 2021 once the Portrait of Sonoma County update is released. Indicators will reflect areas of need prioritized in the Portrait. Department results statements were taken from existing mission/vision statements.

Dashboard and data management:

- Created and launched a data reporting system in Apricot, a cloud-based data management system, to ease reporting requirements for non-profits and County program managers
 - At the close of each fiscal quarter, organizations using RBA send performance measure data to County contract managers. Contract managers submit data for review through Apricot creating opportunity for dual data quality checks.



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- Build and expand Sonoma County Community RBA Dashboard
 - Data from Apricot is entered into the Clear Impact Dashboard to support Turn the Curve Conversations between the County and contracted organizations as well as to ensure broader community transparency.
 - The Dashboard aggregates contract level performance measures across the Safety Net Departments. In addition to presenting an aggregate county wide image of contract performance, the Dashboard offers aggregate details on performance measures by department and can also be used to monitor and improve individual contract outcomes.
 - The Dashboard is currently accessible only by authorized users although reports can be shared publicly. The Human Services Department will publish the Dashboard for external use in June 2022.

How will your approach to implementation help to achieve the pillar goal?

All safety net departments will engage in the implementation of RBA to assess the effectiveness of County contracts. Our approach includes establishing clear metrics to assess effectiveness of investments, developing a data system to easily monitor the progress of investments, maintaining the Clear Impact Dashboard to allow the County to transparently share program performance data and actively connecting with organizations to discuss factors that are either positively or negatively impacting program outcomes. This information will be used to make program changes that will lead to greater client success and improved long-term community health and well-being. In addition, Departments and community-based organizations are and will continue to be provided ongoing training to support the successful implementation. Our approach will ensure an annual increase of at least 10% of contracts above \$50,000 are utilizing RBA with full adoption by 2026 for each Department.

What major activities, projects, and/or efforts will your department/agency undertake to achieve this objective?

Key activities will include expanding the Dashboard as more contracts are added. In addition to expanding the Dashboard, the Upstream Investments team is providing training on RBA implementation for contracts for non-profit organizations and County staff. Upstream staff is also working with additional local funders to implement RBA to create alignment across the funder community.



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What high-level timeline and milestones do you propose for these major activities, projects, and/or efforts?

Annual increase of at least 10% of contracts above \$50,000 utilizing RBA with full adoption by 2026. To maintain a manageable scope of work and ensure a broad picture of the breadth and impact of safety net department contracts, we are currently prioritizing new contracts that are \$50K or more. Ensuring a metered adoption of RBA by County departments allows staff to gradually build out the RBA Dashboard and Apricot data collection system. However, we anticipate that as we reach full implementation (all new safety net contracts over \$50K) there will be a tipping point when we will need additional staffing to effectively manage the workload.

RBA will be implemented in all new procurements. Existing contracts will be allowed to sunset without incorporating RBA. However, as existing contracts are renewed/refunded RBA will be incorporated.

Milestones 2021 – 26

- Publish the Dashboard as an online reference to support Department decisions and transparent contract management.
- Establish systems to collect demographic data as resources are made available.
- Integrate and report on anti-racist metrics across programs monitored in the Dashboard as resources for disaggregate data collection are made available.
- Formalize processes and systems for RBA data collection, data reporting and Dashboard maintenance.

Expand Dashboard to include new programs integrating RBA.

METRICS

Percentage of contracts over \$50K using RBA; Number of contracts submitting quarterly data through Apricot on time; Percentage of contracts reporting positive progress; Percentage of contracts implementing program changes based on data; Timeliness of data uploads to Apricot, Timeliness of Dashboard updates; Online Dashboard publication in June 2022.

What data will be important to collect and/or track to develop good measures and/or indicators?

How Much: # of services/programs provided county/department wide



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How Much: # of people served county/department wide by any program

How Well: # of people completing a county/department program

How Well: % of people completing a county/department program

Better Off: # of people completing a county/department program that met one or more target outcomes

Better Off: % of people completing a county/department program that met one or more target outcomes

How will you address data gaps?

- The County's RBA Dashboard will need to be aligned with the Portrait of Sonoma County indicators. This will allow the County to better understand more short-term progress of program investments related to the longer-term indicators used to calculate the Human Development Index.
- A better focus on equity and the intersectionality of racial equity and social justice will need to be outlined and data desegregated appropriately. The goal is to apply an equity lens to the implementation of RBA.

Lastly, staff resources will be needed to ensure data are quality and collected timely.

COORDINATION & PARTNERSHIP

If this objective has an intersection with an objective in another pillar, how will you collaborate with the Implementation Lead for that objective?

Human Services is leading both 2.1 and 2.2 which are complementary efforts-2.1 establishes the RBA framework and 2.2 produces the Dashboard to monitor progress. In addition, the Dashboard developed within 2.2 will inform where potential gaps in data for underrepresented groups exist. 2.3 is also linked as it identifies data gaps for underrepresented groups and provides an opportunity to engage communities to find solutions.

What partnerships will you form with cities and community partners through implementation?

At its core, RBA offers an opportunity for better engagement between the County and funded organizations through the Turn the Curve (active contract monitoring process). The regular check-in points give County staff and the contractor the opportunity to review data, analyze the factors that might be positively or negatively impacting the



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program and then make changes based on these discussions. This allows for a deeper level of collaboration that hasn't existed prior to the implementation of RBA.

In addition, Upstream is currently contracted to support the application of RBA to the Santa Rosa Violence Prevention Partnership (City of Santa Rosa) funded programs. The City is receiving tailored technical assistance and City of Santa Rosa staff are attending the Upstream RBA trainings. Upstream is also contracted by First 5 Sonoma County to support the application of RBA to their funded programs. Staff are providing tailored technical assistance and First 5 staff and funded organizations are attending the Upstream RBA trainings. The City of Santa Rosa is working toward complete adoption of RBA for all Violence Prevention Partnership Programs and First 5 Sonoma County has integrated RBA into their 2021 – 2025 Strategic Plan.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

How will you engage the public through implementation?

The implementation of RBA has included non-profit organizations for the beginning. The County and non-profit partners have been learning RBA alongside each other and have been equal partners in giving feedback on how best to implement. Through the Turn the Curve process, trainings, and quarterly RBA workgroup meetings, partners are able to give ongoing feedback on what is working and what might need to be adjusted. In addition, the Dashboard is publicly facing and will be accessible to the general public through a link on the Upstream website.

How will you measure the success/effectiveness of engagement approach and plans?

The success of engagement plans will be measured by tracking how the data on the dashboard are being used to guide investment decisions, to inform future Board of Supervisor's strategic plans and ultimately to influence policies.

Details above about intersection with racial equity, applying a racial equity framework on top of RBA, demonstrate application of an equity lens through implementation and process engagement.

The RBA framework and resulting Dashboard will have a countywide approach and is representative of community-based organizations with activities spread throughout the County and serving all County populations. We will be able to report on a number of contracts by geography and populations served.



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RBA offers a mechanism to respond to challenges with program delivery due to pandemics, fires and other unusual circumstances more actively because of the regular Turn the Curve meetings. These meetings provide a time for program adjustments to be made in real time.

FUNDING

Cost per contract included in the Dashboard will determine funding plan. Also, Safety Net Departments should assess if current staffing is adequate to support expansion (i.e. do they have enough designated staff to support RBA contract management and active contract monitoring?)

This project is currently entirely funded by the Human Services Department. Moving forward the safety net Departments will need to develop a pro rata cost allocation plan based on the number of metrics tracked by each department across the Dashboard and number of Dashboards included in a master dashboard. Additional funding to leverage County Dashboard may be secured through contracts with First 5 and the City of Santa Rosa to develop RBA.

Revenue sources:

Ongoing funding through Upstream to provide implementation support and training on how to use the Dashboard. Human Services currently pays for the cost of the Dashboard. Every year, each Department should budget money to pay for a portion of the utilization of the Dashboard. Cost is a per contract based on total number of performance measures.

Expenditures are ongoing.

Changes to staffing, temporary or ongoing, needed to execute the implementation plan: Contract managers who are monitoring the contracts will need to spend additional time supporting data collection and meeting with the participating organizations for active contract monitoring; as the number of contracts increase, more staff may be needed.



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HEALTHY AND SAFE COMMUNITIES

- Goal 2** Establish equitable and data-driven distribution of services
- Objective 3** Identify and eliminate data gaps for underrepresented groups, and collaborate with the community to implement measures to mitigate the negative impacts caused by the lack of access to services by racial and ethnic groups that are disproportionately under-served by 2026.
- Lead(s)** Alegria De La Cruz, Oscar Chavez, Tina Rivera
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IMPLEMENTATION IDEAS AND PROJECTS

This Objective will begin initial implementation efforts with the creation of the ARPA Equity Work Group, with members named on September 14, 2021. The Group will work to center a community engagement process that will co-create our County's path to an equitable recovery from this pandemic by developing unmet community and business needs evaluation criteria, and by informing the County's future equitable disaster response.

Staff will work with the ARPA Equity Work Group to gather and analyze data and to gather and review community input. New data sources include the August 2021 industry and occupation-level data from EDB through their consultant, Dr. Robert Eyler, that demonstrates areas of ongoing need for economic and workforce recovery that present opportunities for investment, as well as the update to the Portrait of Sonoma, which uses the Human Development Index to highlight disparities across education, income and health indicators.

While this work is focused on pandemic recovery, many of the structural changes and best practices that have been earlier identified can be implemented in an accelerated manner in this pilot stage. This pilot will inform efforts to ensure that equity goals are centered in the collection and analysis of County data.

To identify and eliminate data gaps for underrepresented groups, the Safety Net departments and the Office of Equity will receive specific training to learn to apply an equity + RBA model to track internal and external progress



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in addressing the needs of underrepresented groups and in advancing racial equity. With the ARPA Equity Work Group, the County will develop and apply a set of specific indicators and metrics to inform county investments. With the support of expert resources in the Office of Equity's consultant Equity & Results, working together with our community, County departments will apply antiracist principles to strategically disrupt common funding and investment practices that perpetuate inequities and replace them with actions that address the root causes of the problem and lead to improved outcomes.

Key to understanding whether county resources and programs are being equitably distributed and reaching targeted groups, the Safety Net Departments will develop the data infrastructure to collect data by race/ethnicity, nativity, gender identity, socioeconomic status, and disability status, as well as by neighborhood. This data will help departments gain a better and more accurate understanding of the needs of underrepresented groups in our community and their complex experiences.

Because the safety net departments fund community-based organizations, there may also be a need to invest in the data infrastructure of community-based organizations to track disaggregated data and report back to County departments. Data collected from county programs and CBOs will be shared with impacted communities to ensure they have a say in what data are collected, how data are used and how their own identities and experiences are captured.

Timeline (2021 to 2026)

- Eliminate data gaps:
 - o Creation of ARPA Equity Work Group on September 14, 2021, made up of 15 community members from all 5 Supervisorial Districts: Chelsea Rose, Daniela Bravo, Evette Minor, Faith Ross, Grace Cheung-Schulman, Gregory Fearon, Hector Velazquez, Herman J Hernandez, Jon Wheeldin, Mary Sandberg, Patrick McDonnell, Rebekah Sammet, Regina Brennan, Ronit Rubinoff, and Sandra Uribe.
 - o Staff will begin work with the ARPA Equity Work Group on September 24, 2021
 - o Staff will begin to work on the development of additional capacity building and infrastructure needs with community based organizational partners following the release of the ARPA Request for Proposals in February, 2022.



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- Office of Equity and its consultants will train Safety Net departments implementing Equity + Results Based Accountability beginning in April, 2022.
- Development of specific indicators and metrics to inform county investments, beginning in June, 2022.
- Application of the specific indicators and metrics to inform county investments, July, 2022.
- Development of the data infrastructure to collect data by race/ethnicity, nativity, gender identity, socioeconomic status, and disability status, as well as by neighborhood, August, 2022.
- Work with community-based organizations to support the development of their data infrastructure, track disaggregated data and report back to County departments, beginning in September, 2022 and ongoing.

Elimination of data gaps will allow us to see the negative impacts caused by the lack of access to services by racial and ethnic groups that are disproportionately under-served, and the development and application of performance metrics to address that underservice or underinvestment will support targeted investments to address and mitigate negative impacts.

METRICS

The desired outcome is that all County departments are aware and informed about the community members they serve to ensure the provision of culturally responsive and effective service delivery. Easy access to this information will assist County departments to provide the information as well as access to services as needed for them to lead a safe and healthy life.

The following metrics will be applied to track and demonstrate progress:

- Quantity and quality of community engagement efforts;
- Number of additional demographic categories included in needs assessment, research studies, focus groups, reporting and program design;
- Number of community engagement events in zip codes identified as containing people experiencing disproportionate burdens to inform of County key services and programs; number of partnerships with CBOs to inform development and design of County services and programs;
- Number of survey responses from community members;

Number of community recommendations implemented.



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COORDINATION & PARTNERSHIP

In alignment with the County's Racial Equity and Social Justice Strategic Plan pillar, the County recognizes that meaningful and effective change can only occur when we co-create solutions with the communities most impacted, in this case with the ARPA Equity Work Group, by COVID-19. The Work Group was established to inform the County on urgent needs to support the equitable recovery and to develop suggestions for targeted mitigation strategies to interrupt inequitable funding allocations. From September – November, 2021, the Work Group will review qualitative and quantitative data to identify areas of focus for investment in and development of government/community partnerships.

There are major pieces of connectivity to the Racial Equity & Social Justice Pillar, and this data infrastructure and analysis work will ensure that the County and its partners has the disaggregated data to support focused and targeted investments with common metrics and performance measures across the systems.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

The ARPA Equity Work Group is comprised of multi-sector community leaders that, collectively, are able to identify and speak to the myriad concerns and needs of our low income communities, Black, Indigenous, and communities of color, and LGBTQI communities. They are selected based on their capacity to:

- Accurately represent the current needs of these communities
- Organize and strategize to achieve the Vision and Mission of the Work Group
- Identify and connect to community members and partners

The creation of the ARPA Community Equity Work Group is a pilot project, and the best practices and challenges experienced here are likely to be addressed in the County's future Community Engagement Plan efforts.

FUNDING



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We will need funding to support our work with consultants Equity & Results who are assisting the Office of Equity, Upstream Investments, and Economic Development Board's work with the ARPA Community Equity Work Group with the creation of a Results Based Accountability + equity approach to ARPA funding allocations (\$40,000).

We will also need funding to support the development of a Community Engagement Plan, which will assist to identify the best practices in sharing equity reports and data with the larger community. The Office of Equity has submitted an ARPA proposal to support the development of that Plan, including payments of stipends to community members and community based organizations to participate in the development of the Plan. (\$150,000 for stipends and contracts with community based organizations, and \$200,000 for consultant services).

There are likely additional costs to train and support our community based organizations to deepen their capacity to collect and report new data points. Costs: unknown and ongoing.



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HEALTHY AND SAFE COMMUNITIES

- Goal 3** In collaboration with cities, increase affordable housing development near public transportation and easy access to services.
- Objective 1** Rezone up to 59 unincorporated urban sites suitable for housing development, increasing density allowance from 354 units to 2,975 units, and partner with developers and the community to break ground on as many sites as possible by 2026.
- Lead(s)** Brian Oh

IMPLEMENTATION IDEAS AND PROJECTS

By rezoning up to 59 sites for multifamily housing development into the County's upcoming Housing Element update, the County ensures these sites will be appropriately analyzed for the increase in density. By investing time and resources in partnering with developers and the community to streamline development of these sites, the County can ensure we can break ground on as many sites as possible by 2026. Partly due to recent state laws such as SB 9 and SB 35, staff will be creating a set of Objective Design and Development Standards, which will be the primary method of evaluating new residential development. By creating a set of objective criteria to process residential development, Permit Sonoma will be streamlining the development of housing throughout its jurisdiction. By working with the community throughout this process, we will ensure an inclusive engagement practice throughout this process.

Major activities, projects, and/or efforts to undertake in order to achieve this objective, and Timeline:

- Board adoption of Objective Design and Development Standards by June 2022
 - Rezoning of sites through Board of Supervisors adoption of an EIR by Jan 2023
-



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- Through the outreach process of the Housing Element update, policies and programs will be identified for inclusion in the Housing Element update. These policies and programs will be focused on supporting redevelopment of eligible sites for affordable housing developments

In addition to rezoning the sites and updating the Housing Element, focused outreach to builders and property owners will need to be done to streamline as many sites as possible by 2026.

METRICS

Measures and/or indicators demonstrating progress towards achieving the objective:

- Final adoption of a set of Objective Design and Development Standards by June 2022
- Final adoption of a certified Housing Element update by Jan 2023, which will include the rezoning of an adequate number of sites
- # of housing permits approved annually
- # of applications submitted by year until 2026

Key data to collect and/or track to develop good measures and/or indicators:

- Housing development trends
- New permit applications
- New housing units built

Data gaps will be addressed by working with State and regional counterparts.

COORDINATION & PARTNERSHIP

To ensure partnership with Cities and Community members through implementation the project will support the creation of a Housing Working Group that can help us partner with developers and the community to break ground on as many sites as possible by 2026. Furthermore, the County of Sonoma recently kicked off a new regional collaborative to work with Sonoma and Napa County jurisdictions to work together on addressing housing policy.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

Engaging the public will happen through the update of the County's Housing Element, which will be done in coordination with community-based organizations, service providers, and developers. Any policy updates that get



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identified by this implementation plan would need to be reflected in this policy update to the County's General Plan (specifically its Housing Element).

Success will be measured not just by the amount of engagement, but also on quality and inclusiveness of the approach and plans (e.g., have we included the public in the decision making process, where has the public been able to reflect its needs in the process, etc.).

An equity lens through implementation, i.e., process, engagement, etc., will be applied by working with the community to develop the implementation strategy on how best to achieve our goals. Appropriate compensation and value of the community's time.

Geographic equity, equity in service access, through implementation will be ensured by implementing an equity prioritization within the 59 sites for staff in implementation of this goal.

By identifying sites near public transportation and easy access to services, the project goal includes consideration of climate impacts. Additional consideration can be adopted by creating new climate policies within the Housing Element update.

FUNDING

While staff was not successful in including this as a recommended ARPA proposal, staff has submitted a one-time request for \$180,000.00 through the Climate Implementation Fund. Staff is submitting a duplicate request through the County's Strategic Plan implementation fund.

While Permit Sonoma has recently secured \$47,588.00 from ABAG to partially fund the county's Housing Element update, staff estimates needing an additional \$180,000.00 of consultant work to support staff in completing this work on time and meeting a key implementation strategy of the county's Strategic Plan.

Planning does not have FTE allocated to support working with developers and the community on specific sites to redevelop as part of the Housing Element update. Allocating funding to support this work would also be done in coordination to achieve HSC Goal 3.3.

ARPA funding: A certified Housing Element will allow the County to continue to seek State funding for affordable housing, and will contain provisions to make affordable housing development in the County more efficient and cost-



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effective. Furthermore, housing insecurity, overcrowding, and homelessness were risk factors for COVID-19. Therefore, staff feels all of these proposed activities are eligible for ARPA funds.

External funds: Staff has already recently secured funding from ABAG to leverage existing FTE to complete the work. This one-time request of funds would fully supplement staff's estimates on total funds needed to complete this work.

No new revenue streams are expected to be created.

All expenditures will be one-time funds.



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HEALTHY AND SAFE COMMUNITIES

- Goal 3** In collaboration with cities, increase affordable housing development near public transportation and easy access to services.
- Objective 2** Identify and leverage grant funding sources for permanent supportive and affordable housing development.
- Lead(s)** Dave Kiff
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IMPLEMENTATION IDEAS AND PROJECTS

The CDC staff and our partners in cities and the Continuum of Care (CoC) will collaborate as a region in applying for Sonoma County's share of new State and Federal dollars associated with Permanent Supportive Housing and Affordable Housing, as well as seeking to maximize existing re-authorized sources. These new and existing sources include:

- Project Homekey - These State dollars are specifically oriented towards permanent supportive housing for persons leaving homelessness, and can include modular units like at Los Guilicos Village.
 - HHAP – Round 3. In August 2021, the State announced its allocations to counties, large cities, and CoCs for the third round of Homeless Housing, Assistance and Prevention Program (HHAP) funding. Our region will receive over \$8.5M in just a few months, and can prioritize both services and housing for persons experiencing homelessness. Another similar amount is expected in HHAP's 4th round in 2022. Receipt of HHAP-3 funds requires an updated Homeless Action Plan (by June 30, 2022). This plan necessarily involves the active participation of the public, especially disadvantaged communities and persons with lived experience in homelessness.
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- **HOME Funds.** This Federal funding source funds housing rehabilitation as well as new construction (and site improvements related to each) for income-restricted units. To use HOME Funds, at least 90% of the families benefited must have incomes at or below 60% of Area Median Income (AMI). The remaining 10% of units must be for families at 80% of AMI or lower.
- **CDBG/Urban County Funds.** Decisions over our annual allocation of Federal Community Development Block Grant (CDBG) funds are shared with seven non-entitlement cities (all Sonoma County cities except Santa Rosa and Petaluma). The Cities and Towns Advisory Committee (CTAC) and the Community Development Committee (CD Committee) have prioritized spending of these funds for qualifying affordable housing projects in the Urban County.
- **ARPA Funds.** The CDC has asked the Board of Supervisors to consider allocating \$5M in Federal American Rescue Plan funds for a one-time infusion into the County Fund for Housing (CFH), which annually releases a NOFA for affordable housing support in the range of \$2M (the NOFA for Fall 2021 is expected to be in the range of \$1M to \$2M without the ARPA dollars).
- **County Fund for Housing (CFH).** As noted, this funding is released annually and comes from a combination of developer in lieu fees, County general fund contributions, hotel bed taxes, an allocation from the State known as Permanent Local Housing Allocation (PLHA) generated from a documentary transfer tax of \$75 per home (SB 2, 2017), and other funds.
- **Measure O.** Measure O has an allocation of roughly \$500,000 per year for supportive housing projects (based on a sales tax assumption of \$25,000,000 total). This is a new ongoing revenue source for these units (for 10 years).

Our implementation approach is to focus the CDC, the CoC, and our partner cities on regularly collaborating (via “all hands” meetings) to prepare for and offer our best projects for these funding sources, where the sources are competitive. Activities and projects here include regular strategy meetings, disseminating information about each grant opportunity on a regular basis, and summarizing approaches at the CoC Board meetings on a regular basis. More specifically:

- Collaboration meetings at least quarterly through June 2023
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- Monthly CoC Board meeting reports – these meetings are open the public and public comments are encouraged.

Monthly updates of the funding calendar showing timelines for NOFAs and awards – these will be posted on the CDC webpage for public awareness.

METRICS

Measures and/or indicators demonstrating progress towards achieving the objective:

- Taking 2021 as a starting point for PSH and Affordable Housing units under planning, development, construction and completed, and comparing that from 2022-2026.
- Determining what amount of State and Federal funds Sonoma County is entitled to receive by need/population, and using that as a benchmark to see if we received that amount or more.
- Ensuring that we never miss a deadline to secure competitive and other funding, and that we never have to return funds unused.

As such, data important to the above measurements includes knowing the amounts and sources of funds, knowing the number of PSH and Affordable units in the pipeline, and awareness of the deadlines noted above. Much of this information is currently collected, as the only known data gap today is a comprehensive calendar of pending NOFA dates and deadlines (which is now in a draft form with the CDC staff).

COORDINATION & PARTNERSHIP

Our project intersects with the Racial Equity and Social Justice Pillar as well as the Climate Action and Resiliency Pillar. To ensure that we are collaborating with both, we will ask the Office of Equity to review our application strategies, our projects under consideration, and our outreach and communication efforts for the public input portions of our effort (including the Homeless Action Plan). We'll do this to ensure that the end products – housing units - will be accessible to and secured by persons from disadvantaged communities in a manner proportionate with the Sonoma County demographic data. A follow-up data point will be whether that equity in persons housed is achieved.



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As to the Climate and Resiliency Pillar, new construction and many rehabilitation projects funded here will follow updated building and fire codes and regulations.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

This plan necessarily involves the active participation of the public, especially disadvantaged communities and persons with lived experience in homelessness.

Depending on the Covid19 situation: Holding community forums between Jan 2022 and April May 2022; April to BOS; submitted to state by June.

FUNDING

The best implementation funding for this effort would be additional revenue for the one fund that is entirely at the County's discretion, the County Fund for Housing. The Fall 2021 ARPA request of \$5M for the CFH would provide up to 2.5x as much funding for affordable and supportive housing projects as we'd see typically. When that is combined with new State Project Homekey and HHAP-3 dollars, the region should see significant progress in expanding units in the housing continuum's pipeline for supportive housing and affordable housing.

CDC Staff will also continue our aggressive approach to securing the region's share of competitive grant funding, such as Project Homekey.

Of these sources, the CFH (at generally \$2M per year) and Measure O's funding (at generally \$500,000/year) are recurring. Federal CDBG and HOME funding levels are fairly consistent as well, depending on the administration and Congress. While in recent years there have been annual allocations of Project Homekey and HHAP (and a significant one-time allocation via ARPA), these funds right now are not structured to be recurring, as the others are.

As to expenditures, the CDC staff time for our Affordable Housing and Ending Homelessness units is a recurring and ongoing expenditure already in the CDC and County budget. No new one-time expenditures are envisioned by this Implementation Plan.



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HEALTHY AND SAFE COMMUNITIES

- Goal 3** In collaboration with cities, increase affordable housing development near public transportation and easy access to services.
- Objective 3** Identify and leverage grant funding sources for permanent supportive and affordable housing development.
- Lead(s)** Dave Kiff, Brian Oh
-

IMPLEMENTATION IDEAS AND PROJECTS

Approach to implementation:

By working with partners such as developers and communities in need of affordable housing, staff ensures that its approach to implementation will help increase the number of affordable housing units near good access in the County. Working directly with those involved throughout the development cycle ensures that the staff is promoting desirable incentives. State law recently changed. State incentivizes housing development around transit. This changes the playing field, we need to assess the types of incentives that will align with state law, such as looking at more density development or fee waiver. As we learn about those changes, we could move forward with the more effective ones

Major activities, projects, and/or efforts undertaken to achieve this objective:

- Create an objective Design and Development Standard for multifamily developments (by summer 2022 to align with HSC3.1)
 - Establishment of Housing Working Group to support the County's efforts on facilitating affordable housing in the County.
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High level timeline:

Annual review by Permit Sonoma and staff report to the Board consent calendar on existing incentives, increase of units, and recommendations for next year as to ways to improve these incentives.

METRICS

- Number of units built before and after policy implementation
- Reduction in the cost of developing multifamily and affordable housing by reducing permitting timeframes
- Increased certainty for housing developers as to the process for approval, and for community members as to what to expect from multifamily housing developments

The following data will be important to collect and/or track to develop good measures and/or indicators:

- Number of units built before and after policy implementation
- Cost of building multifamily and affordable housing
- Permitting timeframes before and after policy implementation

Data gaps will be addressed by working to collect the needed data (e.g. during intake of new permits, surveys with partners, etc...).

COORDINATION & PARTNERSHIP

In terms of intersection with other objectives Brian is the lead on HSC3.1, which is a related goal to this objective (same pillar).

Partnerships with cities and community partners through implementation will rely on:

- Establishment of a Housing Working Group that includes city partners will be critical.
- Staff leads a similar effort that includes Planning Directors in all Sonoma County jurisdictions.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS



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To engage the public through implementation, Staff intends to leverage a recently on-boarded consultant who is tasked with facilitating a Housing Collaborative between Sonoma and Napa County jurisdictions. The scope includes a robust public engagement strategy and staff intends to leverage this effort to establish a Housing Working Group for the County of Sonoma.

Success will ultimately be measured by the county's ability to provide safe and affordable housing to its constituents. Success of its engagement approach and planning may be measured by how inclusive of a process it will be and the level of input that is received by the community. Success will be measured by how effective staff was in including a diverse group of stakeholders.

Equity will be a key component through all aspects of this effort. By being inclusive of communities most in need of affordable housing, staff can ensure a robust engagement process to develop incentives for affordable housing development.

To ensure geographic equity, Staff will work with each District office and confer with existing data on where the focus our efforts in the County.

Climate impacts consideration will be addressed by identifying sites near public transportation and easy access to services, the project goal includes consideration of climate impacts. Additional consideration can be adopted by creating new climate policies within the Housing Element update.

FUNDING

One-time fund of \$161,927.00 to hire a consultant to create an administrative approval process for housing developments. Implementation activities will be supported through County Fund for Housing, Project Homekey-2 (for supportive housing projects), HHAP-3 (for supportive housing projects), Measure O (for supportive housing projects), and the American Rescue Plan (ARPA) allocations.

Staff will continue to look for external funds at the state and regional level to supplement our existing staff efforts. Please see the Implementation Plan for HSC3.2.

Measure O and CFH are ongoing sources of funding for housing development. Project Homekey-2, HHAP-3 and ARPA are one-time funds, but can be re-allocated depending on Congress and the State Legislature.

Consultant work will be a one-time expenditure.



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HEALTHY AND SAFE COMMUNITIES

- Goal 4** Reduce the County's overall homeless population by 10% each year by enhancing services through improved coordination and collaboration.
- Objective 1** Conduct a peer review of neighboring counties, other agencies, and successful models in other states to identify best practices for preventing and reducing homelessness through various housing options and supportive service models.
- Lead(s)** Angela Struckmann, Tina Rivera
-

IMPLEMENTATION IDEAS AND PROJECTS

This objective has largely been met by the April 2021 *Improving Integration & Outcomes to Benefit County Residents: Assessment of Housing and Homeless Services and Programs* Report by KPMG. Utilizing this report, internal teams in partnership with cities are preparing recommendations for the BOS. In this report, a number of peer reviews were conducted and a list of best practices adopted in other counties directly correlating to preventing and reducing homelessness is included. Additionally it includes estimated quantified impact of new practices on preventing and reducing homelessness.

Currently internal teams are putting together homeless and housing inventories, funding inventories, and assessing County/city collaborations for housing options and supportive service models that best meet the needs of Sonoma County's residents.

METRICS

- Number of peer reviews and list of best practices identified and selected to inform county projects
 - Number and scale of County Projects incorporating peer review, communities and CBOs recommendations.
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COORDINATION & PARTNERSHIP

We will continue to hold monthly meetings with cities and CBOs to talk about our encampment practices, and to identify what are the best practices as far as encampment outreach, clearing, and enforcement practices are concerned. These discussions enable us to share and learn from each other, such as comparing and discussing the County's clearing practices and how the cities do it. This engagement enables both jurisdictions to identify the most recent best practices. Furthermore, the city of Santa Rosa and County are under a federal injunction, thus we always need to identify best options for the homeless and how to achieve zero functional homelessness.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

We organize several opportunities for Community engagements hosted in conjunction with each one of our supervisors;

We hold community meetings in collaboration with the district supervisor and CBOs located within that district. We also meet with neighbors to educate them about services we are providing as well as receive ideas from neighborhoods. We held community meetings with Supervisors: Hopkins, Coursey, Gore and Gorin.

These meetings take place at least on a bimonthly basis, but also as needed depending on the circumstances and encampment issues. For instance, if we are looking to providing safe parking, we engage communities to get suggestions around indoor outdoor sheltering.

FUNDING

This is an ongoing activity that is already funded. No additional funding requested.



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HEALTHY AND SAFE COMMUNITIES

- Goal 4** Reduce the County's overall homeless population by 10% each year by enhancing services through improved coordination and collaboration.
- Objective 2** Partner with cities to build a strategic plan for homeless prevention and housing strategies by 2023.
- Lead(s)** Dave Kiff

IMPLEMENTATION IDEAS AND PROJECTS

The CDC staff and our partners in cities and within the Continuum of Care (CoC) will collaborate as a region in developing a single, unified Strategic Plan for homeless prevention and housing strategies not later than 2023, but sooner than that if we can do so. In addition, the same parties will be working on a Homeless Action Plan (HAP) to be complete and approved by the Board of Supervisors and CoC Board not later than June 30, 2022. The RFP for this HAP was issued and a consultant has been selected. The HAP may be considered as important background material to and a first-year series of action steps that follow strategic objectives later outlined in the 5-Year Strategic Plan.

A 5-Year Strategic Plan for Homeless Prevention and Housing Strategies is likely to include:

- An overall vision for the Plan and its expected goal (likely to be functional zero persons unhoused in Sonoma County).
- Background on homelessness in Sonoma County, with statistics and updated data based on the 2022 Point in Time Count as well as:
 - Historic programs
 - An inventory of current programs and services
 - An updated Housing Inventory



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- An updated summary or listing of affordable units outside of the Housing Inventory
- Causes of homelessness in Sonoma County, varying types of unhoused experiences – chronic, recent, and more.
- Estimated costs of homelessness – monetary, societal, and more
- Definitions and terms
- Solutions and approaches with action steps and estimated program costs.
- Proper organization of County and other structures and departments to provide effective services, programs, and oversight.
- Known and likely funding sources – Federal, State, Local, philanthropic and more.
- Known and likely stakeholder and partner groups, including community-based organizations, municipalities, other governments, other agencies in the County family, and more.
- A communications effort to assist the general public in understanding the Plan as well as the best methods to solve and prevent homelessness
- Expected outcomes with measurable goals and timelines.

Our implementation approach is as follows:

- Begin work with the CoC Board, cities and stakeholders on a 2022 Homeless Action Plan (HAP) as required by the Homeless Housing, Assistance and Prevention (HHAP) Round 3 due by June 30, 2022. This work has already started and will continue through April 2022. The 2022 HAP will allow us to gather early data, write the background, and the initial strategies that will build into the 5-Year Strategic Plan. This may include:
 - An RFP for and hiring of HAP and strategic plan consultant
 - Securing the early use of HHAP-3 funds for development of the 2022 HAP.
 - Conducting a Needs Assessment of our homeless population as suggested in the KPMG report.
 - Completing and updating a Programs and Services Inventory showing existing/current actions.
 - Completing and updating our Housing Inventory, including types of housing units and numbers of beds, from Emergency Shelter to Affordable Housing units.
- Use the 2022 HAP to build a more strategic 5-year plan in Fall 2022, a process that may also include:
 - Facilitation
 - A mission, vision, and values process.
 - A working group involving CoC representation, County representation, and city representation.



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- A public participation component, including an emphasis on ensuring equity of participation and equity in results.

The timeline is as follows: The HAP will be due in June 2022. The Strategic Plan will be due on December 2022. The implementation starts right away for HAP: in July 2022, and for the strategic plan in January 2023.

METRICS

Success can be measured by:

Completion of the Needs Assessment by February 15, 2022;

Completion of the 2022 HAP by May 1, 2022, with approval from the CoC Board and the Board of Supervisors and submittal to the California Department of Housing and Urban Development (HUD) not later than June 30, 2022.

Completion of the 5-Year Strategic Plan by March 2, 2023, with approval by the Board of Supervisors, the CoC Board, and interested city councils not later than June 30, 2023.

Data important to the success of this Objective includes identifying information from the 2020 and 2022 Point in Time Count(s), amounts and sources of Federal, State, and Local funds, updating and completing a Programs and Services Inventory, updating and completing our Housing Inventory (including getting a better understanding of affordable units outside of the units in our Housing Inventory, such as affordable units).

Much of this information is currently collected and regularly updated, but more research will be needed to better capture housing units outside of our inventory as well as current programs and services.

COORDINATION & PARTNERSHIP

Our project intersects with the *Racial Equity and Social Justice* Pillar as well as the *Climate Action and Resiliency* Pillar. For these: we will ask the Sonoma County Office of Equity to participate in our HAP and Strategic Plan development, and to review the draft document(s) and our public outreach plan. One goal will be to ensure that the end products – housing units - will be accessible to and secured by persons from disadvantaged communities in a manner proportionate with the Sonoma County demographic data. A follow-up data point will be whether equity in persons housed is achieved.



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It is likely that both plans (the HAP and the Strategic Plan) will identify a need to place additional supportive housing and services near transit. We note too that all new construction and many rehabilitation projects funded here will follow updated building and fire codes and regulations.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

As mentioned above, a communications effort will take place to assist the general public in understanding the Plan as well as the best methods to solve and prevent homelessness.

The 5-Year Strategic Plan for Homeless Prevention and Housing will also include community forums, including surveys, and at least two rounds of feedback: feedback before CoC and feedback before the BOS.

FUNDING

Funding for the 2022 Housing Action Plan (HAP) is likely to come from the County's and or the CoC's allocation for HHAP-3 funds, which specifically allow for the development of a HAP as a part of early funding.

We estimate that the development of the HAP and Strategic Plan will require about \$250,000 across two fiscal years FY 2021-22 and FY 2022-23, but up to half (the FY 2021-22 allocation) may be from HHAP-3 given the role that the 2022 HAP plays in starting off the Strategic Plan effort.

CDC staff, DHS' Health Program Policy and Evaluation (HPPE) staff, and representatives from cities and the CoC Board will be tasked with development of the HAP (as facilitated by a contractor) and for guiding the development of the 5-year Strategic Plan (as facilitated and possibly written by a contractor).

The HHAP-3 funds are one-time funds, linked to a one-time effort (the development of the 2022 HAP). The completion of the 5-Year Strategic Plan (building from the 2022 HAP) will likely be a one-time expenditure of General Funds or other sources in FY 2022-23.



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HEALTHY AND SAFE COMMUNITIES

Goal 4 Reduce the County's overall homeless population by 10% each year by enhancing services through improved coordination and collaboration.

Objective 3 Increase investment in programs that treat underlying causes of homelessness, including substance abuse, mental illness, poverty, and lack of affordable housing.

Lead(s) Angela Struckmann, Tina Rivera, Dave Kiff

IMPLEMENTATION IDEAS AND PROJECTS

DHS will be utilizing Measure O, Project Homekey and Project Roomkey funds and other grants to expand and implement new programs that treat underlying causes of homelessness, including substance abuse, mental illness, poverty, and lack of affordable housing.

Some of these major projects include utilizing Measure O funds for expansion in the following areas:

- Residential Care Facilities (\$3,076,250) provide housing and services to individuals with Severe Mental Illness (SMI) who need additional social and behavioral health support.
 - Crisis Stabilization Unit (\$4,529,629) provides services to individuals in psychiatric crisis, to assist them to stabilize and return to the community or transfer to a psychiatric facility for ongoing treatment.
 - Residential Crisis Services (\$1,395,851) or Crisis Residential Treatment facilities provide housing & mental health services to individuals who require longer-term services to stabilize & do not require a locked setting.
-



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- Inpatient Hospital Services – Adult (\$1,500,000) provides inpatient psychiatric care to Medi-Cal beneficiaries on involuntary holds or otherwise in need of intensive psychiatric services as required of the County Department of Health Services, as the Mental Health Plan.
- Mental Health Services at Children’s Shelters (\$551,000) provides on-site mental health services to children who have experienced trauma living in the County Children’s Shelter.
- Services to support Residential Care Facilities, Permanent Supportive Housing, and other Housing (\$2,144,000) helps individuals with mental health and/or Substance Use Disorder (SUD) needs who require in-home and community-based services to live successfully in the community. These services will support individuals provided with permanent supportive housing, which interrupts the cycle of homelessness.

Additionally, DHS is moving forward with new projects utilizing Measure O funds that include:

Transitional Housing - a needed service for individuals who have high levels of mental health needs and do not have a long-term placement agreement. Individuals experiencing a psychiatric crisis, who make progress, but are not yet able to return to their homes safely, require a supportive transitional housing option. This allows individuals to step down from the CSU or crisis residential program, to a setting that offers appropriately less intensive time-limited supportive services. Supporting the timely “stepping down” of individuals, opens CSU and crisis residential beds to others awaiting psychiatric stabilization services.

DHS will seek to acquire property(s) along with state funding we will likely receive, or identify other funding to purchase property(s). We will hold funds for services to wrap-around transitional housing in new location until funding for the facility is secured. Once property is secure, DHS will administer a request for proposals (RFP) for community provider to provide services. Additionally DHS will hire a Housing Manager in the Department of Health Services Behavioral Health Division to oversee transitional and supportive housing programs run by the County (Mental Health Services Act (MHSA), No Place Like Home, etc.). Also we plan to support Probation’s Justice and Mental Health Collaboration Program (JMHCP). JMHCP is a mental health pretrial release program for individuals who qualify for pretrial release, but whom the Courts otherwise would detain due to concerns for their safety because of their acute mental health impairment. Through the program, the Courts can grant such individuals pretrial release in good conscience, knowing that they will receive an assessment and discharge plan in the jail and a warm handoff to stabilization resources and mental health treatment in the community. There is a need for a local



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locked psychiatric health facility (PHF) to serve Sonoma County residents. This will ensure individuals access emergency psychiatric services more timely, at a cost savings to the County. The PHF will serve approximately 100 Sonoma County residents annually. Individuals in psychiatric crisis who do not stabilize within 24 hours under the care of the Crisis Stabilization Unit (CSU) must be transferred to a psychiatric facility for additional care. The state and county shortage of psychiatric hospital beds results in inappropriately long stays at the CSU and hospital emergency rooms and, frequently transfer out of Sonoma County away from their support system and service providers. The PHF will be the first such facility in Sonoma County and will offer 14 beds dedicated to local residents. It enables DHS to provide acute psychiatric services in a timely manner, improving treatment as well as the availability of CSU beds for others in crisis.

Qualifying as a Medi-Cal facility, the PHF will offset county costs for adults (age 22 – 65) by approximately 50 percent by drawing down federal dollars for which other hospitals are ineligible. \$4.6 million has been invested for construction and development of the facility (source: local hospitals, IGT-DHS, Marin County).

Youth and young adults with mental health needs will receive services for prevention, early intervention and case management via a partnership with Santa Rosa Junior College to provide the following: Enhanced Diversity of Mental Health Provision via permanent therapist positions to provide individual therapy and outreach to Latin/x and Black/African-American students. They will hire 7 unlicensed mental health trainees each year to provide therapy, provide a stipend higher than average for the region in order to attract trainees of color and skill and provide mental health training for District Police department focusing on work with diverse populations. The second major focus will be Health Promotion via Health Promotion Assistants to focus on work with student Veterans, faculty departments, and peer health educators during crises.

DHS will expand Sonoma County Drug Medi-Cal Services to provide outpatient and residential treatment services to individuals with substance use disorders (SUD). This project establishes administrative infrastructure to support Measure O-funded expansion and preparation for an application to Department of Healthcare Services (DHCS) to join the Organized Delivery System (ODS) Waiver in approximately 1 year.

Measure O will increase SUD services directly supporting Youth SUD Services. The planning and RFP process will determine the number of clients to be served. DHS currently operates its SUD services within the Drug-Medi-Cal service system. An opportunity to join the Organized Delivery Services (ODS) is projected for some time in 2022. Moving from a Drug-Medi-Cal system to an ODS system will significantly expand the type and volume of SUD



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services available within the county, and increased investment of local funds will bring considerable larger amounts of state and federal funding into the service system. While Sonoma County has needs for SUD services beyond what is currently provided across the demographic and service continuum, the need for youth services stands out. DHS plans to increase services to address community need and Early Periodic Screening Diagnosis Treatment (EPSDT) responsibilities by issuing an RFP (\$314,000) for Youth SUD services. (Note: Would draw down FFP, increasing amount of Service Contract)

Individuals who are homeless or need mental health and substance use disorder services to successfully transition to housing in the community. The Whole Person Care program focuses on intensive outreach and case management to homeless or at risk of becoming homeless individuals with chronic and persistent mental health needs, chronic medical issues, substance use disorders, high utilizers of emergency medical services, frequent crisis mental health services, and criminal justice problems. In calendar year 2020 (Year 5 of Whole Person Care), 1,457 individuals were served through outreach and engagement and 154 of these individuals participated in Intensive Case Management. Services aim to stabilize individuals linking them to resources and housing, addressing mental health and medical needs, and reducing utilization of emergency medical, acute psychiatric, and criminal justice systems.

High Needs Homeless (HNH) services are currently funded through a state pilot program, Whole Person Care (WPC). Funding for the WPC pilot ends 12/31/21. The state is replacing WPC services with an Enhanced Care Management (ECM) benefit to be managed by Partnership Health Care Plan (PHP). DHS is in negotiation with PHP to provide ECM, and to continue to serve its current clients. Ideally, ECM funds will allow the DHS HNH program to continue operating. If not, DHS will redesign HNH to continue to provide services that do not interfere with or subsidize ECM. The determination of whether or not DHS is an ECM provider will be made between now and the end of the calendar year.

Measure O funds could be used to cover High Needs Homeless (HNH) Team (the WPC team), which would be redesigned to ensure it is not duplicating or subsidizing ECM/CalAIM. Redesign will be in collaboration with cities, align with the Continuum of Care Strategic Plan, and KPMG Report recommendations.

At the CDC level, discussions are taking place with the CDC/Housing Authority team, the Santa Rosa Housing Authority team, community-based organizations, and cities about **housing locators**. Housing locators tend to be persons knowledgeable in the real estate industry who are skilled at identifying, educating, recruiting, and



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maintaining the satisfaction of property owners who rent to persons of low Area Median Income (AMI), who have housing vouchers, and/or who are coming out of homelessness.

The collaboration for the recent Emergency Housing Vouchers (EHVs) program reminded us that we need more available units. Given the status of current discussions, teams are assessing two paths:

- (1) If we have the right number of housing locators who have the right skills, then it makes more sense to prioritize a way to regionally communicate better, and/or to develop a regional shared infrastructure; or
- (2) if we don't have the right number of housing locators today, how can we get to that point with the right persons and the right skill sets, and then how we will regionally collaborate?

METRICS

- Increase in access to housing and services to individuals with Severe Mental Illness (SMI) who need additional social and behavioral health support. (number of individuals with SMI provided with access to housing and services; and length of stay; rate of recidivism among the housed)
- Expansion in the type and volume of SUD services available within the county
- Increase SUD services directly supporting Youth SUD Services (number youth accessing the program and successfully receiving services)
- At the CDC level, metrics for the housing locators include launching a Centralized Housing Location Pilot to test either or both of the options described within the housing location section above.

COORDINATION & PARTNERSHIP

We collaborate with cities providing similar programs as the crisis care mobile units in Rohnert Park, Petaluma, and Santa Rosa and have made investments (or will be) in their pilot MST-like programs.

DHS and CDC have strengthened city/County partnerships to collaborate on multiple applications to rehab existing motel/hotel/schools etc. into Interim Housing and Permanent Supportive Housing units. These include in the cities of Santa Rosa, Rohnert Park, Petaluma, Healdsburg, Sebastopol, and in the unincorporated areas.

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Within all of these new strategies, an attention to racial equity and social justice, and a climate-impact focus are inherent to doing work differently and being responsive to the needs of our community. Staff involved feel passionately about implementing new procedures around data collection, surveying clients and patients for feedback, and hiring diverse staff and providing training on cultural sensitivity and reducing our carbon footprint.

FUNDING

- A Project Homekey NOFA was released at end of September 2021, and DHS and CDC have looked at city/County and community-based organization partnerships to collaborate on applications to rehab existing motel/hotel/schools etc. into Interim Housing or Permanent Supportive Housing units. Applications will come forward from Healdsburg, Petaluma, Rohnert Park, Santa Rosa, and the County.
- We have also recently received additional funding in Project Roomkey for Non-Congregate Shelter (NCS) sites coming thru HSD. We will seek additional funding for the NCS as well.
- We also received notice that there will be approximately \$1M dollars from state/fed funds available to apply for on behalf of cities for mental health services.
- Additionally we will be applying to DHCS for the Crisis Care Mobile Units (CCMU) Program for Crisis Care Mobile Teams. We are already collaborating with cities providing similar programs in Rohnert Park, Petaluma, and Santa Rosa and have made investments (or will be) in their pilot MST-like programs.
- There was a \$2M investment by BOS for safe parking and staff are in discussions with the city of Santa Rosa and have identified sites in Petaluma, Santa Rosa, Sebastopol, and the Sonoma Valley.

Funding needs vary across the programs and will utilize state and federal grants, FEMA dollars, Project Roomkey and Homekey dollars, and Measure O funds.

Regarding the housing location efforts, \$100,000 is requested to secure the expertise of a firm/individual to organize either or both of those efforts described in the implementation ideas and project.



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HEALTHY AND SAFE COMMUNITIES

- Goal 4** Reduce the County's overall homeless population by 10% each year by enhancing services through improved coordination and collaboration.
- Objective 4** Create a housing resource tool for Safety Net departments to efficiently assist residents with accessing available housing by 2022.
- Lead(s)** Angela Struckmann, Tina Rivera
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IMPLEMENTATION IDEAS AND PROJECTS

DHS will work with our CDC partners to create a tool that tracks in real time the county's shelter beds and temporary & permanent housing availability in one location. Staff are in preliminary discussions with IBM to create this resource, which could be potentially completed in 2022 depending on funding. Multi-disciplinary teams case managing individuals will be able to access this database and see spaces available at scattered sites and Palms Inn, Elderberry, Mickey Zane, etc. It will show units available, when sites will be ready, eligibility for specific locations, and potentially private market leasing available.

This database could potentially include BH placements, SUD placements in real time as well.

The bed inventory pilot began with COTS of Petaluma. This pilot with COTS is included in the SAMHSA grant. The tech team has had some meetings with Watson Care Manager demonstrating the functionality. Timing for implementing would probably be 2-3 months for the pilot once funding is received, but some of the general referral process mapping with COTS can begin in January once the latest version update to WCM takes place (scheduled for Jan 14th).

METRICS



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- Reduction in time spent to match residents with available housing
- Increase in the number of people housed thanks to housing identified through this new tool
- Increased rate of retention and number of people who don't return to homelessness due to the quality of housing options identified.

COORDINATION & PARTNERSHIP

Various meetings are being held with CBOs, with city partners about data sharing and the bed inventory tool, such as city of Santa Rosa, Rohnert Park, and Healdsburg; Additional discussions on other options outside of IBM, such as other types of software to consider are being held. We are holding regular monthly meetings, including with the CDC to discuss how we could share data with respect to bed inventory. Cities would have to put some money in.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

The database enhancement will require an attention to racial equity and social justice to ensure we are making this tool useful to all residents of Sonoma County. This will be core to the changes made by IBM and they are on board with keeping equity at the core of our data transformation. Additionally this work will allow for less travel and paperwork from clients and staff so it inherently has a positive climate-impact.

FUNDING

An ARPA request has been created for this (IBM Bridge request) and staff are exploring using grant funding such as SAMHSA, which we anticipate to secure within this fiscal year. This would be part of the funding that will pay for this IBM tool.



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HEALTHY AND SAFE COMMUNITIES

- Goal 4** Reduce the County's overall homeless population by 10% each year by enhancing services through improved coordination and collaboration.
- Objective 5** Continue to collaborate with local partners, including Continuum of Care, to advance planning and policies to address homelessness
- Lead(s)** Dave Kiff
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IMPLEMENTATION IDEAS AND PROJECTS

The Community Development Commission (CDC) staff and our partners in cities and the Continuum of Care (CoC) will collaborate as a region to advance policies and planning that leads us to housing our unhoused population.

To further collaborate, we will:

1. Maintain the County Administrator/City Managers work group, which began meeting in 2021 to ensure good communication and data sharing about homelessness efforts.
 2. Engage with the CoC Board with a spirit of transparency and openness, sharing information and knowledge with our Board partners.
 3. Regularly update the Board of Supervisors, the Community Development Committee, the Cities and Towns Advisory Committee (CTAC), cities and the CoC Board on items of interest, including providing a monthly (or at another schedule reflecting the timeliness of a specific issue) emailed update to all parties interested in CDC, CoC, and housing and homelessness issues with current information and links to resources.
 4. Develop informational tools to help collaborate, such as:
 - a. A funding and timing document, showing what outside funds go where, their eligibility, and pending releases of Notices of Funding Availability (NOFAs).
-



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- b. A master calendar of meetings.
- c. Explanatory documents, helping show the housing pipeline, who provides what services in Sonoma County, and more.

Some of these actions are already done and expected to be completed by June 2022. After this deadline, semi-annual update will continue (every six months is appropriate).

5. Convene regular “all hands” strategy sessions on Zoom or in person that allow for strategizing and best practices team-sharing regarding items of key interest. These sessions will take place on a monthly basis starting in January 2022.

METRICS

We can measure our progress here by:

- Checking in with our partners regularly to ensure that we building trust, sharing information, and are meeting this objective overall. We will measure consistency in holding County Administrator and City managers meeting. We will target quarterly check-ins starting fall 2021.
- Meeting the monthly email/update obligation.
- Regular updates on the finding and timing document, as well as the master calendars. We will measure update consistency and target an update every six months, if not earlier.
- Production of funding and timing document
- Implementation of meeting calendar: consistency and quality of meetings

COORDINATION & PARTNERSHIP

Our project intersects with the Racial Equity and Social Justice Pillar. We will ask the Office of Equity to review our communications materials.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS



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All the meetings are open to the public. The general membership meeting has an open forum, and the agenda driven meeting provides an opportunity for public comments.

FUNDING

There is no significant funding impediment to this objective, as it can be done with current staff. We estimate that it will take about 10-15 hours for one or more individuals (collectively) per month.



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HEALTHY AND SAFE COMMUNITIES

- Goal 5** Continue to invest in public safety so that residents and visitors feel safe in our community.
- Objective 1** Continue to invest in cultural responsiveness and de-escalation training and techniques for County law enforcement workforce.
- Lead(s)** Jim Naugle

IMPLEMENTATION IDEAS AND PROJECTS

How will your approach to implementation help to achieve the pillar goal?

Adding or expanding training (both in content and number of training hours per deputy) is the only way to achieve the pillar goal as it relates to training. More detail can be found in the BIR that was submitted to the Board below.

What major activities, projects, and/or efforts will your department/agency undertake to achieve this objective?

We will be expanding our pre-existing training related to de-escalation and bias. We have incorporated bias policing topics into our quarterly use of force training program, in addition to the POST mandated training we have always provided. We are also adopting an overarching de-escalation policy for our office.

We have already incorporated additional de-escalation concepts into our current training. There are also new mandates from the California Commission on Peace Officer Standards and Training (POST) that have set out new recommendations for de-escalation training. In fact, we have six deputies attending the Force Options Use of Force/De-escalation train the trainer course within the next two months. This course will certify these students to be instructors and satisfy the requirements of SB 230 and AB 26.



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What high-level timeline and milestones do you propose for these major activities, projects, and/or efforts?

These changes have already been implemented or are well under way. The department's de-escalation policy was recently adopted. The timing for any additional trainings would depend on funding being made available and staffing levels.

METRICS

What measures and/or indicators will you use to demonstrate progress towards achieving the objective?

We track the number of training hours provided for each Deputy Sheriff.

What data will be important to collect and/or track to develop good measures and/or indicators?

Training hours per Deputy.

How will you address data gaps?

N/A

COORDINATION & PARTNERSHIP

If this objective has an intersection with an objective in another pillar, how will you collaborate with the Implementation Lead for that objective?

N/A

What partnerships will you form with cities and community partners through implementation?

We work with IOLERO, DHS Behavioral Health, and various community groups for feedback.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

How will you engage the public through implementation?

Through our regular community outreach and IOLERO.



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How will you measure the success/effectiveness of engagement approach and plans?

Unknown

How will you apply an equity lens through implementation, i.e. process, engagement, etc.?

N/A

How will you ensure geographic equity, equity in service access, through implementation?

N/A

How will you consider climate impacts through implementation?

N/A

FUNDING

What implementation funding plan do you recommend?

We would need additional funding to add any additional training. We are currently covering all of the mandated training and additional training mentioned above. If we were to add training, it would require additional funding from the Board of Supervisors.

What current sources of funding, County discretionary or other, are available to support implementation activities?

Unknown

Are any Implementation Plan activities or projects eligible for ARPA funds?

Yes, this training is eligible for ARPA funds. The Sheriff's Office submitted a proposal requesting ARPA funds to expand de-escalation and cultural responsiveness training, and IOLERO submitted a related proposal to implement a local Community-Oriented Policing program. (These proposals are separate though).



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How will you seek external funding to leverage County funds?

We submitted a request for ARPA funding, and can explore other grant funding if/when it becomes available.

Which revenue sources are one-time funds vs. ongoing?

If the Board approves the Sheriff's ARPA proposal, the one-time ARPA funds would expire December 2024. We would need local discretionary funding sources to cover annual training costs after 2024.

Which expenditures will be one-time vs. ongoing?

Any additional training expenses will be ongoing if they are going to be effective and lasting.

What, if any, changes to staffing, temporary or ongoing, will be needed to execute the implementation plan?

Any time we implement additional training, there is a direct impact on staffing. We cannot bring deputies in off of patrol to train without replacing them. So they will either need to come in on overtime, or we will have to backfill them while they train. No additional permanent staffing would be required.



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HEALTHY AND SAFE COMMUNITIES

- Goal 5** Continue to invest in public safety so that residents and visitors feel safe in our community.
- Objective 2** Better integrate services and handoffs within the Safety Net departments.
- Lead(s)** Tina Rivera, Angela Struckmann

IMPLEMENTATION IDEAS AND PROJECTS

Implementation of the following projects and efforts will assist in achieving pillar goal Ref # HSC 5-2) as all aspects are designed to, and have proven effective at, streamlining access, improving service integration, and bolstering coordination of care among the Safety Net Departments. The work presented below reflects both existing and potential for future expanded efforts of the IMDT.

Sonoma County has utilized the ACCESS Sonoma's Interdepartmental Multi-Disciplinary Team (IMDT) technology, infrastructure, and its specialized cohorts of staff to effectively respond to those experiencing homelessness, conducting outreach, engagement and case management.

This summary will highlight project necessity, project impact, and discuss rationale for pursuing staffing investment to support our impacted community in the following efforts.

ACCESS Sonoma - IMDT Cohorts

HEART Expansion / CERG

Those in our community experiencing homelessness have been greatly impacted by COVID-19. Most recently shelter outbreaks and related emergency room COVID-19 positive cases have resulted in the necessity to re-open the ACS, and double down vaccination and outreach efforts for those vulnerable to COVID. The nature of



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homelessness creates a heightened risk, and as such the CERG and IMDT expansion cohorts have been tirelessly supporting those who are medically vulnerable and at the NCS sites

With the recent shelter outbreaks and having vaccinated individuals hospitalized the ongoing need to support and protect COVID-19 vulnerable homeless and the community at large is clear. As of 7/9/21 there were 175 homeless COVID-19 vulnerable persons sheltered at different Non Congregate Shelter (NCS) and Homekey locations. The CMSP CERG funded IMDT COVID cohort is committed to supporting these individuals with comprehensive case management at the NCS sites, but the CERG grant is set to expire 10/31/2021. As such, the IMDT is pursuing ARPA funds for sustainability to these CERG staff, beyond that grant end date, as it is anticipated the need will persist. With the Delta variant increasing its impact, the need for the CERG team, NCS sites and related efforts seemingly exist for the near future.

There is potential for upwards of 260 individuals needing case management at NCS sites alone in the future state necessitates a minimum of 13 FTE staff dedicated. Between CERG and IMDT expansion, 10.0 FTE's currently provide this support. Of those, 5.0 FTE's are in jeopardy or time-limited with the grant end date noted. The additional 5.0 FTE's from IMDT expansion working the NCS sites would need to cover that gap, along with being available to serve as support for HEART encampments. This would result in caseloads upwards of over 50 per staff, which is not sustainable or effective in providing in depth support.

Behavioral Health Diversion Cohort Expansion:

ACCESS Sonoma's Behavioral health Diversion Cohort will be pursuing funding to expand staffing by 3.7 FTEs to serve an additional 25-30 clients, effectively increasing program capacity by 125%. This increase would fold in existing qualifying clients being served by other SCBH teams that would be better housed in the diversion program. It would increase capacity to engage unserved clients involved in the criminal justice system.

This work would reduce burden of care to the criminal justice system with reduced recidivism, related costs savings, and mitigating COVID-19 risk by keeping vulnerable persons out of custody, a higher risk congregate setting.

To accomplish this aim, adding 2.0 BHC, .20 Psychiatrist, and .20 Nurse and .30 SOA would enable the appropriate scaling at the ground floor. A 1.0 Clinical Specialist would provide supervisory oversight, complete necessary risk assessments, and support admission functions that would eliminate the requirement to expand the HPM allocation further ultimately saving costs.



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Additional development of new assessments, reporting, compatibility for new data input, and enhancements to existing cohort items will be folded into phase of development with IBM.

Whole Person Care

The state funded Whole Person Care program is undergoing transition in the coming Calendar year, to the more robust and comprehensive CalAIM programming. This effort is being led by the WPC Manager and BH Director, in effort to prepare the WPC program for this transition. Per DHCS, “CalAIM is a multi-year initiative by DHCS to improve the quality of life and health outcomes of our population by implementing broad delivery system, program and payment reform across the Medi-Cal program. The major components of CalAIM build upon the successful outcomes of various pilots (including but not limited to the Whole Person Care Pilots (WPC), Health Homes Program (HHP), and the Coordinated Care Initiative) from the previous federal waivers and will result in a better quality of life for Medi-Cal members as well as long-term cost savings/avoidance.”

ACCESS Sonoma - IMDT Data Solutions

IBM Licenses and Bridge Between Watson Care Manager (WCM) and CDC for Homeless Bed Count:

This project proposes to address a funding gap in the ACCESS IBM License funding. Funds would be utilized to cover these costs in FY 22/23, FY 23/24, FY 24/25, and FY 25/26.

The “Connect P” technology is to be piloted with COTS. Preliminary discussions and demos have taken place in previous IBM development phases and the piloting agency is onboard. This software functionality allows community partners and county staff to share information about and coordinate utilization of a resource or service with multiple vendors. In the case of this piloting project, shelter beds with varying attributes for hundreds of clients could be coordinated through “Connect P” in WCM. This functionality saves immense time by eliminating the need for multiple phone calls from provider to provider. It has capacity to empower a user to search for a single resource such as homeless bed from as many partners as are set up in the system without making a single phone call, and then requesting one or more of those resource items.

The development of a “Bridge” between WCM and Homeless Management Information System (HMIS) would further improve efficiencies and is proposed. A “Bridge” would allow direct data entry into HMIS from WCM by the end user. This “Portal” of data entry could be integrated with community partners. Functionality to export bed



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count data from WCM and importing it into HMIS would be built which will enable updating bed inventories in HMIS using WCM and the portal by both county staff and community partners.

Data Extracts, Hub Maintenance

This project will provide critical support to further develop and implement data and reporting components of the ACCESS initiative, specifically facilitating data extraction from the various sources systems into the Cognos 360 Reporting Portal and further building upon the recently completed initial development of the 360 reporting hub. The project will provide funding for that data extraction and reporting portal maintenance, as well as funding for a DHS Department Analyst position to coordinate source systems, build standard reporting across systems, provide analysis of those reports and to assist internal staff in determining gaps in services that guide program priorities and development of future cohorts. Along with the new DHS Analyst role, this project would support an ISD Program Manager to oversee all technical aspects of the reporting portal. ISD previously had a manager assigned and unfunded by the Board, who was reassigned to other priority areas for ISD and the funding for that role was folded into aspects of the ISD IBM contracts for Watson Care manager and the Cognos 360 reporting portal. Since this occurred the Department Director has filled in, but the ISD manager is critical and would provide critical technical and system specific oversight of the data extractions, import into the reporting portal and management of any new or future additions to the system.

This work would provide critical analysis and reporting support for all of the IMDT cohorts, allowing for the IMDT and ACCESS initiative as a whole to improve community costs savings. To accomplish this aim, adding 1.0 Department Analyst and a 1.0 FTE ISD Program manager would enable the appropriate staffing to accomplish these efforts. The projected costs associated with this effort are further clarified in the Narrative Explanation of Estimated Project Costs section.

Additional Data Sources

This project will support the development of a “bridge” between WCM and CDC’s Continuum of Care (CoC) and Sonoma County Housing Authority (SCHA) databases, to provide bed counts, utilization and availability for contracted providers of housing programs (Homekey sites, SCHA, PSH and others). The projected cost for the bridge is \$200,000, which will be built in consultation with IBM and appropriate CDC/SCHA database vendors. This will provide regular and detailed information to WCM via an API (Application Programming Interface), allowing for a real view of the scale, scope and utilization of non-emergency beds available throughout the CDC and County. It is



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anticipated that this will require a .50 Community Development Specialist, to facilitate the development of and continuing management of the bridge, as well as returning representation of the Ending Homelessness team on the IMDT (participation has been reduced due to competing priorities and limited staffing on the Ending Homelessness team).

KPMG Study Driven Actions:

Along with the aforementioned efforts at improving programming and data solutions, the IMDT aims to gain funding for and invest in improved integration with community partners including cities and CoC board organizations. This strategic objective will require a one-time \$350,000 investment in data mapping of key city data systems for integration with the County data hub. Once systems are mapped, a \$200,000 one-time investment to build a “bridge” with the assistance of IBM will create the appropriate technological mechanisms to share data between city systems and the resulting enhancement to the county data hub.

In order to leverage and utilize data obtained from cities and other sources, data must be in digestible reporting format. A \$100,000 additional one-time investment in developing additional analytics and reporting in Cognos with IBM will allow the county to develop displays, reports, and analytics to support County objectives. These enhancements would provide more specialized and granular geographic data to identify city needs, disparities, and assist with data driven responses in alignment with higher level BOS priorities.

A .50 FTE ISD Project Manager will be required at \$110,000 per year to assist with data programming, monitoring, and maintenance.

A .50 FTE Program Manager will be required at \$100,000 per year to assist with analysis and program monitoring across County.

CER/COVID and MH Diversion Cohort - This COVID project started in May 2020 with IMDT cohorts providing support in response to the COVID-19 pandemic at the original Sonoma State University Non Congregate Shelter (NCS) location. . The COVID efforts may wane before that time, but that timeline is available should the projects be funded.

The Mental health Diversion program likewise has been in operation, major milestone would be attaining expansion funds, recruiting staffing and serving the 100-125% additional capacity. ARPA funding is being pursued for both cohorts, and if awarded allows expenditure of funds between 12/15/2021 through 12/31/2024. IF ARPA funded, the



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Diversion expansion project could launch 2/01/2022, with funding expiring 12/31/2024. Milestones would be continued tracking of the numbers served, and additional data outcome noted below in question 4&5

IMDT Data Solutions –

1) IBM License and Bridge Between WCM and CDC for Homeless Bed Count:

License (picking up funding gaps):

Project Start Date: 07/01/2022

Project End Date: 06/30/2026

“Connect P” and “Bridge”

Project Start Date: 01/01/2022

Project End Date: 01/01/2024

2) Data Extracts, Hub Maintenance

Project Start Date: 01/01/2022

Project End Date: 1/31/2024

3) Additional Data Sources

Project Start Date: 01/01/2022

Project End Date: 1/31/2024

KPMG Study Driven Actions:

One-time investments (Data Mapping, Data “Bridge”, and Cognos)

Project Start Date: 01/01/2022

Project End Date: 01/01/2024



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Staffing

Project Start Date: 01/01/2022

Project End Date: 12/31/2024

METRICS

- The indicators of progress for the IMDT cohort related projects (CERG and BH Diversion expansion) will include: reduced incarceration and recidivism, increase access to housing, benefits and related stabilizing resources, and reduced access to emergency services such as ER, Ambulance, and similar services.
- The indicators of progress for the IMD Data Solutions will be the effectiveness in achieving the goals and outcomes proposed above. Each task will have specific timelines and indicators of progress, tracked internal and by IBM as WCM vendor.
- The indicators of progress for the KMPG related activities will be tracking actions taken to meet the KMPG report recommendations, whether they are fully implemented or need further effort.

It is anticipated that metrics will track:

- Increase in the numbers of referrals between programs and departments.
- Increase in the numbers of referrals resulting in programs enrolment and avoiding crisis events (nonevents).
- Increase in the estimated savings resulting from accurate referrals and coordination of services
- Reduction in utilization of higher-cost emergency services.

Data collected and tracked as part of IMDT efforts will include:

- numbers served/enrolled
- numbers referred/enrolled in safety net services/benefits
- numbers housed

The very nature of the projects currently under way and also being proposed addresses data gaps, in this case specifically by improving live data on shelter bed availability, improved reporting functionality, as well data



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integration with existing databases and efforts noted above. All the above Data Solutions are aimed at further enhancing the IMDT Watson Care Manager system and reporting tools.

COORDINATION & PARTNERSHIP

This objective does not cross into other pillars of the Strategic Plan, but the work of the IMDT and efforts under this objective will support additional objective in the Healthy and Safe Communities Pillar of the plan. Namely these efforts support the objectives noted in Goal 1 - Expand integrated system of care to address gaps in services to the County's most vulnerable. Goal 2 - Establish equitable and data-driven distribution of services and Goal 4 - Reduce the County's overall homeless population by 10% each year by enhancing services through improved coordination and collaboration.

The ACCESS Sonoma initiative and IMDT are partaking regularly in CoC meetings, as well as regional planning and service coordination groups within the various geographic areas of the County (West, North South, Central and East), so as to improve partnerships with community providers, jurisdictions funding similar services and also healthcare and similar partners so as to improve the IMDT model. This includes weekly Community Transitions to Care meeting with all community Hospitals and Clinics, Project Hope with City of Santa Rosa, NCS and weekly IMDT meetings bringing together the safety net departments.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

The public will mainly be engaged via outreach and engagement activities noted of the HEART, IMDT Expansion, CERG, WPC and Diversion teams. They will be connecting with community, providers and the public to carry out this work on a regular basis.

Effectiveness will be measured by progress in implementing the above stated expansion and new project activities, while maintaining strong outcomes for existing efforts and programming.

These projects will be further alleviating economic and racial disparities in Sonoma County, seeking to support the most undeserved and unhoused in our community. Information from the 2018 census indicates that the majority of people living in Sonoma County identify as White (86.8%). Some identify as Hispanic or Latino (27.2%). Few identify as multi-racial (4.0%) and even fewer identify as Black or African American (2.1%). In 2019, the number people experiencing homelessness at the PIT was 2,951, with 994 of those staying in shelters or transitional



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housing programs, and 1957 unsheltered, or in cars, parks, tents, sidewalks or other places not meant for habitation. The percentages of individuals experiencing homelessness and identifying as White was significantly lower than the percentage of individuals identifying as White county-wide in 2019 (65% vs. 86.8%).

By contrast, the percentage of individuals experiencing homelessness and identifying as either Alaska Native or American Indian (6%) or Black and African American (9%) was disproportionately higher than the county's census numbers (1% and 2%, respectively). This demonstrates that individuals in these racial groups are disproportionately more likely to be homeless in Sonoma County.

The proposed project will continue to address this racial disparity of those experiences of homelessness in communities of color, by further providing accurate data and connecting those communities to services by increasing outreach and engagement opportunities. Additionally, those experiencing homelessness are often extremely low income, which the IMDT works to address this via benefits enrolments, and income enhancement efforts when possible.

To further apply an equity lens through implementation, the IMDT cohorts are comprised and proactively seek to employ a diverse and robust staff, representing a variety of communities, perspectives, and experiences so as to provide a culturally competent and welcoming service environment.

ACCESS Sonoma and IMDT services are available and conducted throughout the County. In addition to conducting outreach and engagement services in the County areas of oversight, the IMDT aims to provide coordination first with local jurisdiction contracted providers, and as needed support those organization in collaborative outreach efforts. As noted prior, IMDT is involved with regional planning and homelessness efforts throughout the County, to ensure this very geographic representation access.

While not a main focus of the projects, the IMDT cohorts do aim to minimize climate and environmental impacts of work, utilizing lease green vehicles and reducing vehicle trips. In addition, the WCM provides a paperless database for care coordination, and IMDT outreach staff are equipped with tablets and remote internet, so as to be able to conduct live data entry in the field, further reducing trips and use of office supplies.

FUNDING

The implementation funding plan includes a combination of existing funds, as well pursuit of additional funds from available resources, including ARPA proposal, possible SAMHSA funding and earmarked legislative federal funds



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supporting these efforts of ACCESS Sonoma and IMDT. Measure O funds were approved to provide a year of funding for the IMDT expansion team. Ongoing funding will be needed as each year, we are faced with this situation for the sustainability of our COHORTs.



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HEALTHY AND SAFE COMMUNITIES

- Goal 5** Continue to invest in public safety so that residents and visitors feel safe in our community.
- Objective 3** Assess and determine the most appropriate community response program to respond to individuals in the community experiencing a psychiatric emergency, including an analysis of whether to expand the Mobile Support Team, and bring a recommendation to the Board of Supervisors by 2023.
- Lead(s)** Tina Rivera
-

IMPLEMENTATION IDEAS AND PROJECTS

The Mobile Support Team (MST) accompanies law enforcement on calls to provide crisis intervention to individuals in psychiatric distress. Santa Rosa, Petaluma, Rohnert Park, and Cotati have developed two different pilot programs similar to MST (SAFE and inRESPONSE), and the County is working to expand and improve the availability of MST across all districts in Sonoma County.

Sonoma County and the cities of Santa Rosa, Petaluma, Rohnert Park and Cotati have received conditional approval of their joint application to the state Crisis Care Mobile Unit (CCMU) RFP. This state grant will support the establishment and expansion of new psychiatric & SUD mobile crisis units with 75% of the funds committed to infrastructure costs and 25% is set aside for services to individuals, who do not have insurance coverage. Rohnert Park & Cotati have received \$1M for their partnership which will establish a mobile crisis unit operated by the Petaluma People Services Center (PPSC) which has begun training and should launch early next year. The City of Petaluma Specialized Assistance for Everyone (SAFE) program, also operated by PPSC, which has been operating since July, received \$1M to expand. The Santa Rosa inRESPONSE mobile crisis services program, a program established by Santa Rosa Police Department is a partnership that includes Santa Rosa Fire Department, Sonoma County Department of Health Services (DHS), Buckelew Programs and Catholic Charities, will receive \$498,899 for the program that will begin in November 2021.



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Staff are working with Kaiser Permanente Emergency Department (ED) to implement a pilot that will make MST staff available to support the transfer of individuals from their ED. This project is designed to test whether or not this service will be effective in expediting transfers from an ED, improving client care and reducing the impact of psychiatric crises on EDs. It will also address "downtime" the MST program experiences as it is currently designed. Leadership is working with employee relations to submit a summary of this program for unions to review.

MST expansion as directed by the Board during Budget Hearings in September of 2020 to North County and Saturday Sunday services has been delayed by recruitment challenges, however recruitment will be ongoing until we have adequate staffing to implement expansion.

METRICS

The cities running MST-like pilots are working with the County to establish a collaborative program outcome and evaluation workgroup led by the DHS Health Policy, Planning and Evaluation (HPPE) Division. Within this project, Sonoma County Mobile Support Team (MST), Santa Rosa in RESPONSE, Petaluma SAFE and Rohnert Park/Cotati mobile crisis programs will share common data definitions, data platforms and analyses to ensure that the cities and county are identifying lessons learned from their programs to support program quality improvement, as well as the expansion of these enriched mobile crisis services across all of Sonoma County's communities.

COORDINATION & PARTNERSHIP

DHS is working with Santa Rosa Police Dept. to merge the MST Santa Rosa Team with their new mobile crisis program 'In Response' as launched in November.

DHS met with Petaluma Police Dept. and Petaluma People Services Center to discuss integrating their program with MST and determined the MST Petaluma team should stay in place until their program is operationally stable. Leadership will be negotiating a limited amount of support MST will provide to Petaluma Pilot Program team (i.e. placing 5150 holds, responding to complex situations, etc.), and modify the deployment of the MST Petaluma team to reflect a reduced need for MST services in the city. Rohnert Park and Cotati will be duplicating Petaluma's model.

The MST teams take part in regional planning and service coordination groups within the various geographic areas of the County (West, North South, Central and East), so as to improve partnerships with community providers,



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jurisdictions funding similar services and also healthcare and similar partners so as to improve the MST model. This includes weekly Community Transitions to Care meeting with all community Hospitals and Clinics, Project Hope with City of Santa Rosa, NCS and weekly IMDT meetings bringing together the safety net departments.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

MST expansion will be highlighted in Measure O communications to the public via a quarterly newsletter and press releases. MST staff will be connecting with community, providers and the public to promote and educate regarding the availability of these services.

Effectiveness will be measured by progress in implementing the above stated expansion and new project activities, while maintaining strong outcomes for existing efforts and programming.

MST helps to address racial disparities by providing a path towards help for mental health crises instead of routing individuals in crisis to Emergency Departments or jail. It will also continue to be very important to provide accurate data and connect marginalized communities to services by increasing outreach and engagement opportunities. Applying an equity lens through implementation, we will proactively seek to employ a diverse and robust staff, representing a variety of communities, perspectives, and experiences to provide a culturally competent and welcoming service environment.

MST services are available and conducted throughout the county and expanding to ensure geographic equity. While not a main focus of the projects, MST staff minimize climate and environmental impacts of work by utilizing lease green vehicles.

Staff will be looking at performance measures over the course of 1 year for each pilot, and assess how well each performed with the goal of all MST programs aligning.

FUNDING

The County has already put in discretionary funding of \$5.5M over 3 years for MST expansion. MST is also a critical part of the Measure O expenditure plan and for the first year will provide investments in infrastructure to cities running MST-like pilots. From Measure O, the BOS has allocated a one-time investment of \$428,000 to Cotati/Rohnert Park and Petaluma each and \$85,887 to Santa Rosa to assist those jurisdictions in developing their pilot programs for a total of \$941,887. DHS will assess performance of the 3 programs over 1-2 yrs to inform



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decision making and future investments. Additionally MST staff will assist Santa Rosa's inRESPONSE team as an in-kind support to their pilot.

Additional funding sources for MST include Coronavirus Response & Relief Supplemental Appropriations Act (CRRSAA) funding that will be jointly applied for by DHS and city partners in August 2021. Funds will be up to \$1.5M per city. This will cover staffing including Peer Support and Law Enforcement as well as infrastructure (vehicles, communications, etc.) Additional funding allocated from the State is described above.

MST is an ARPA-eligible program but we do not anticipate asking for ARPA funds to support the project.

DHS will provide infrastructure funding for the first year as these pilots get started (vehicles, communications, etc.) and evaluate further investments at that time.

The state is releasing funding announcements that should bring additional financial resources to Sonoma County.



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HEALTHY AND SAFE COMMUNITIES

- Goal 5** Continue to invest in public safety so that residents and visitors feel safe in our community.
- Objective 4** Expand detention alternatives with the goal of reducing the jail population, from pre-pandemic levels, by 15% at the end of 2022, while simultaneously reducing recidivism amongst the supervised offender population.
- Lead(s)** David Koch
-

IMPLEMENTATION IDEAS AND PROJECTS

Approach to implementation to help achieve the pillar goal: Use of appropriate alternatives to detention serve to safely reduce the jail population and also increase potential for recidivism reduction.

Major activities, projects, and/or efforts undertaken to achieve this objective: A robust pretrial services program is already in place and achieving desired goals. Likewise, the Courts, justice partners and Behavioral Health have implemented the Mental Health Diversion program and expanded the Mobile Support Team program; both offer a more appropriate response to people in the community experiencing mental health distress. It should be noted however that these two initiatives do not lend themselves to measurement other than to count the number of individuals successfully diverted from the justice system. Probation anticipates implementing the Behavior Management System which provides a more consistent and structured approach to sanctioning, relying on objective risk assessment measures to impose sanctions – including short periods of incarceration, electronic monitoring, imposition of work crew and community service hours, as well as resumption of behavioral intervention programming – with the supervised offender population. Transitional housing, provided by Inter-Faith Shelter Network with funding from the Community Corrections Partnership and State grant funds, is a resource for unsheltered, justice-involved individuals releasing from custody (jail or prison) and as an intervention for those individuals who are at risk of being incarcerated for violating supervision conditions.



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High-level timeline and milestones

The Pretrial Services and Mental Health Diversion programs are already in place and functioning. Implementation of the Behavior Management System and expanded MST are anticipated by the end of CY 2021.

METRICS

Data collection and measurement criteria are already in place for pretrial, MH Diversion, and transitional housing. Justice system and Behavioral Health data on the MH Diversion population include offense type and severity, basic defendant demographic information, housing status, MH assessment, and ultimate case disposition. Key performance measures include satisfactory or unsatisfactory program completion. Pretrial reports on number of assessments completed, number released to pretrial monitoring, number detained, booking offense, risk assessment level, arrestee demographic data including age, race/ethnicity, gender, release decision, conditions ordered, compliance with monitoring conditions, number of condition violations, and disposition of original offense. Key performance measures: re-offense while on pretrial monitoring (Y, N, type); FTA for Court (Y, N, number of times); and pretrial monitoring outcome (successful/unsuccessful).

The number and length of custodial sanctions and electronic monitoring/work crew hours imposed on the supervised population needs to be collected to compare pre-response grid with post-response grid activities to ascertain differences in length of stay, frequency of incarceration, severity of violation behavior and ultimately recidivism measures.

We will address data gaps by determining data already available, identifying data collection gaps and implementing data capture/reporting mechanisms through the Integrated Justice System, Odyssey (Courts) and Behavioral Health database.

COORDINATION & PARTNERSHIP

We will identify potential points of intersection and coordinate data collection efforts to gain efficiencies.

Primary partnerships will be with local law enforcement; ongoing dialogue, information sharing and collaboration on data collection. Additional discussion with InterFaith Shelter Network, which provides transitional housing and case management services to the population of mentally ill individuals placed on pretrial monitoring.



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COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

We will conduct information/education campaigns especially directed toward above-referenced community-based organizations and potentially through IOLERO.

We will apply an equity lens through the validation and review of these data in relation to use of the Public Safety Assessment (pretrial risk assessment) as well as analysis of data regarding use of behavioral response grid/policy.

All programs mentioned above are offered county-wide, and access to service is not denied to any person requiring assistance. The pretrial program has measurement criteria assessing whether racial inequities exist in our practices. Similar data analysis can be developed for all the other programs referenced above. For example, data on race, ethnicity, sexual orientation, gender identity, etc. are already captured with respect to people entering the criminal justice system.

FUNDING

Currently, all programs to be evaluated are funded. A combination of general fund, State/grant funds and Measure O funds are utilized.

Probation will receive Measure O funding to support case management of mentally ill defendants released to pretrial supervision.

The ARPA proposal for related services is not prioritized for funding: Probation submitted an ARPA proposal to support case managed housing for mentally ill defendants released to pretrial supervision. This proposal was not recommended for funding.

We continue examining State and Federal grant funding opportunities related to implementation efforts. Our request for Measure O funding was successful as regards case management for pretrial defendants with mental illness.

- Community Corrections Partnership (State) budgeted funding for Pretrial Services and case managed housing amounts to \$2,695,283 in FY 21-22.
- Measure O funds for case management amount to \$80,000 for half of FY 21-22 and \$160,000 annually starting in FY 22-23.



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- Estimated Judicial Council (Superior Court) funding for pretrial operations is \$1,083,833 in FY 21-22, decreasing to an estimated \$500,000 in following years.
- County general fund covers cost of existing adult probation staff implementing the behavior response system.
- Existing MADF, DA, Public Defender and Probation staff who have a hand in implementing pretrial services and the behavior response system are funded through County General Fund contributions and Community Corrections Partnership allocations.

All current funding sources are deemed ongoing; however, they may be considered one-time as State and County approval of budgets occur on an annual basis. Measure O funding is in place for at least 3 years.

Strategic Plan funding will be requested for:

Programming and database development to input, track and evaluate sanctions (short-term incarceration, electronic monitoring and work crew/community service hours) imposed in the context of implementing the behavior response grid/policy, as well as limited programming needed to fine-tune pretrial services operations, data capture and reporting on outcomes. Business systems analysis and ISD programming costs are estimated at \$450,000 (total) over three fiscal years.

The need for additional staff in pretrial services will be evaluated in FY 21-22.



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HEALTHY AND SAFE COMMUNITIES

- Goal 5** Continue to invest in public safety so that residents and visitors feel safe in our community.
- Objective 5** Conduct outreach and engagement campaign with communities to build and strengthen community and law enforcement relationships, including education on the difference between calling 2-1-1 and 9-1-1.
- Lead(s)** Paul Gullixson

IMPLEMENTATION IDEAS AND PROJECTS

- Identify community partners and trusted sources of information within the community.
- Build off {SCSO or IOLERO} community engagement work group to develop work plans and actionable items by June 2022.
- Document lessons learned from police brutality and civil unrest cases.
- Under moderation/consultation from CBO, coordinate discussions with relevant County departments and the community to identify needs and resources.
- Develop educational public outreach campaign on the differences and benefits of 211 and 911.
- Implementation will then involve three components including:
 - 1) A series of monthly public community briefings (Zoom-based for 2021-22) involving representatives of law enforcement, Office of Equity, IOLERO, Communications, etc. focused on community safety with weekly themes ranging from sexual assault to elder abuse to cybersecurity to crisis and safety management, etc.



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2) The launching of a County newsletter that will help promote better community understanding of law enforcement/County programs and individuals dedicated to public health and safety; and

3) The launching of a marketing campaign by the end of 2022 to promote 2-1-1 line with potential for Spanish-language PSAs in particular.

METRICS

Success of outreach and engagement will be measured using a multi-pronged approach including data analytics, various community listening tools and ongoing feedback solicitation. These will include:

1. Hosting community forums across the County through a variety of formats including in person, on Zoom and via digital engagement platforms.
 - a. Measure community participation
 - b. Measure retention $(END - NEW) / START \times 100 = \text{Retention Rate } (\%)$ for follow up forums
2. Analytics of individuals calling 9-1-1 as well as 2-1-1
3. Survey
 - a. Have a paid group conduct a survey on the success of the plan
 - i. Address data gaps
 - ii. Improve information cycle
4. Data to be utilized also will include:
 - a. Number of unique visitors and engagement of those following live-streamed and recorded community webinars;
 - b. Average viewership for any online videos/forums
 - c. Click-through rate and engagement of those reading the new county newsletter;

Numbers of those signed up to receive the newsletter as well as engagement opportunities (on-line surveys, opportunities to share feedback, etc.) that will be included in the digital newsletter itself; and click-through rates and as well as key



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metrics for marketing component including: Overall traffic, bounce rate; new vs. returning visitors and user demographics.

COORDINATION & PARTNERSHIP

This pillar intersects with the Racial Equity & Social Justice pillar goal 4, which will serve to engage community members and stakeholders to develop priorities and to advance racial equity. Same leads are assigned to both goals, which will facilitate the coordination of work and exchange of information.

Identify geographic and culturally responsive partners throughout the county to engage in reaching impacted communities. Research what other local jurisdictions, United Way of the Wine Country, and local law enforcement have in place to educate the public on law enforcement and community relationships and the difference between 211 and 911. Partner with groups such as Nuestra Comunidad that are already producing this type of work in the community. Develop informative collateral and partner with identified organizations to disseminate, present, and further inform community members. Will work with city partners to explore opportunities for joint community engagement with law enforcement in incorporated areas.

Also intersects with Organizational Excellence Goal 2, Objectives No. 1 & 2 calling for increased information sharing and transparency and improvement of County and community engagement.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

Public engagement will be the primary objective in achieving the objective of building and strengthening community and law enforcement relationships. This will be achieved through a variety of platforms including social media, streamed town hall webinars, the launching of a new county newsletter and other engagement tools that will operate through an equity lens. In addition, the Communications team will be working with stakeholders and trusted community-based organizations groups to ensure public education is achieved with an emphasis on geographic equity. The equity lens also will be used in the development of collateral materials that will be used to inform community members. Public participation rates will be used as a metric to help determine success and effectiveness of this effort. The Office of Equity will be a key partner throughout this process.

FUNDING



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The cost of implementing this objective is still being researched. Bulk of costs appear to be covered through available ARPA funds and existing funds.

Estimated Project Costs	Estimated Project
Costs	
Marketing Campaign for 2-1-1 line	\$40,000
Cost of initial newsletter software	\$20,000
Estimated Total Project Costs	\$60,000



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ORGANIZATIONAL EXCELLENCE

- Goal 1** Strengthen operational effectiveness, fiscal reliability, and accountability
- Objective 1** Align the Board of Supervisor’s strategic priorities, policy, and operational goals with funding and resources.
- Lead(s)** Peter Bruland
-

IMPLEMENTATION IDEAS AND PROJECTS

How approach to implementation helps to achieve the pillar goal

1. Ensure that available resources are directed toward Board priorities in a strategic manner.

Major activities

1. Identify funding needs associated with strategic plan objectives
 - a. As part of implementation plan development for strategic objectives, leads are developing funding plans for implementation.
 - b. Staff will review funding plans that call for discretionary resources.
2. Identify funding available for strategic plan
 - a. As part of the FY 2021-22 Adopted Budget, the Board approved \$5 million in one-time funding toward strategic plan initiatives.
 - b. Staff will assess ability to carve out ongoing resources specifically for strategic plan implementation beginning in the FY 2022-23 budget cycle; availability will be contingent on allocation of ongoing resources to other strategic priorities, including the County Center redesign.
3. Incorporate strategic plan alignment into all funding decisions
 - a. PG&SP, in conjunction with O&B, will solicit proposals for use of the \$5 million in Strategic Plan funds allocated during budget hearings, with items to be evaluated in February.
 - b. Strategic Plan Alignment, at the objective level, is incorporated into the ARPA departmental funding process.



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- c. Future Program Change Requests and Ad Backs, whether seeking funds specifically allocated to the strategic plan or not, will be explicitly evaluated based on alignment with the Strategic Plan at the Objective Level.
- d. Departments will be encouraged to examine existing funding sources for opportunities to shift resources towards strategic priorities.
- e. Departments and implementation leads are encouraged to seek outside funding sources for implementation of objectives.

Milestones & Timeline

<ul style="list-style-type: none"> • Identify \$5 million of 1x funding for the strategic plan 	Completed – July, 2021
<ul style="list-style-type: none"> • Identify initial strategic plan objective funding needs 	Fall 2021, in conjunction with implementation plans
<ul style="list-style-type: none"> • Include strategic plan alignment in ARPA funding discussions 	December, 2021
<ul style="list-style-type: none"> • Revise budget instructions and Program Change Request forms to include strategic plan alignment 	December, 2021
<ul style="list-style-type: none"> • Distribution of \$5M set aside for strategic plan 	February, 2022
<ul style="list-style-type: none"> • Inclusion of strategic alignment in all funding decision matrixes 	June, 2022; Ongoing
<ul style="list-style-type: none"> • Inclusion of strategic plan alignment discussion in budget book 	June 2023; ongoing

METRICS

Success Measures

1. Completion of funding plans and overview of expected needs as part of Implementation Plans for all Strategic Plan objectives; Compilation of identified needs associated with these objectives and any funding metrics that are included



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2. Completion of new forms and instructions to integrate strategic plan into budget funding decisions
3. Track assignment of specific funds toward strategic objectives. Note tracking of that total funding toward strategic objectives will not be possible as much of the work is being accomplished within existing allocations and within the normal cost of business.
4. Inclusion of strategic plan lens in Budget request evaluation process and presentation to the Board
5. Inclusion of Strategic Plan alignment in Budget document

COORDINATION & PARTNERSHIP

This item is tied to all strategic objectives, as it is designed to align resources with these objectives. Completion of this objective will require close coordination between teams at the CAO office, particularly between the Operations and Budget team and the Policy, Grants, and Special Projects team in compilation of information about objectives and in evaluation of funding requests. It also requires coordination with departments to ensure that they understand the need to align resources and resource requests with strategic priorities.

Because this relates to the Board's strategic priorities, there is not direct outreach or connection with the public for this item.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

How the proposed activities and efforts uphold the values and principles identified in the strategic plan, including geographic equity, leveraging funds, climate resiliency and equity

1. By aligning funding with the Strategic Plan, the values and principles of the plan will be upheld.
2. Equity is a core component of the strategic plan, and as such will be included and considered in all funding decisions.
3. The direct implementation of this plan does not have geographic equity or climate impacts.

FUNDING

Recommended Funding Plan

1. Outlined work on implementation will be incorporated within normal budget activities and accomplished with existing CAO and departmental staff.
2. Should more in depth tracking of all funding to align with strategic plan objectives be required, significant additional resources would be required, including one-time funding for adjustments to budget systems and



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ongoing funding due to an increase in administrative staff work in departments and the CAO that would likely require additional staffing. A cost estimate has not been developed as this action is not recommended.



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ORGANIZATIONAL EXCELLENCE

- Goal 1** Strengthen operational effectiveness, fiscal reliability, and accountability
- Objective 2** Establish a master list of technology needs that support operational/service improvements by mid-2022, identify enterprise solutions, and develop fiscal strategies to fund and implement improvements.
- Lead(s)** Sherry Bevens, Steve Sorensen, Michelle Arellano
-

IMPLEMENTATION IDEAS AND PROJECTS

How approach to implementation helps to achieve the pillar goal

Ensure that available resources are directed toward Board priorities in a strategic manner. It will also elevate prioritization of technological tools required to maximize operational productivity and resources countywide.

High Level Strategy

Successful development of a master list of technologies will require the implementation team to: (1) understand the priorities and needs of county departments, (2) identify those priorities requiring supporting technologies, and (3) identify existing systems supporting departmental operations to facilitate best sharing of technology solutions. These needs are already being captured in a variety of ways (e.g., Board priorities, departmental goals and objectives, strategic planning focus groups, strategic planning implementation plans, ARPA funding request submissions). The ability to meet this objective will be determined by how effectively the implementation team can draw on these knowledge sources in the most efficient manner. Another determinant of success will be the ability to provide the data in a format that adds value to the consumers of the information. For instance, cloud hosted technologies better support business continuity, disaster resiliency and reduced carbon footprint. Public facing technologies with online self-service functionalities broaden our ability to reach our constituents in need of services that reduce the reliance on transportation which is ultimately more equitable and climate friendly. Identifying which metadata to capture will be a key task for the implementation team.



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Major Activities

- Determine which set of metadata best defines and clarifies the purpose of the proposed technologies.
- Work with all Strategic Planning Steering Committees to gain access to implementation plans to identify the technology component.
- Interview ISD management who are already working with department clients to develop technology solutions.
- Engage with departments to obtain a list of existing technology solutions that create efficiencies for common internal processes, provide input on the technology list, and to identify any missing information and/or additional technology solutions required to enhance internal operational efficiencies and/or service to the community.
- Perform a countywide review of technological needs identified and determine if opportunities exist where solutions may be adopted across departments.
- Work with departments to identify available funding sources for implementation of technology solutions.
- Develop financial strategies to fund technology improvements.
- Establish a periodic review process to ensure that the master list remains up to date based on changing priorities and needs.

Milestones

• Finalize master list metadata and format	October 30, 2021
• Meet with Strategic Planning Steering Committees across pillars	November 30, 2021
• Meet with ISD for technology feedback	November 30, 2021
• Survey departments	January 30, 2022
• Release draft master technology list for review	June 30, 2022
• Finalize master technology list	July 30, 2022
• Develop funding strategies	October 31, 2022

METRICS



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Success Measures

The primary success measures for this objective include:

- (1) The master technology list reflects the needs and priorities of the departments and guides in the selection of technology solutions, as well as catalogs existing systems in place that streamline essential departmental operations.
- (2) The master technology list contains sufficient attributes for each technology such that decisions makers can adequately assess the appropriate use of technologies to include department lead, objective, estimated cost ranges and high-level project timelines.
- (3) Development of financing strategies to fund technology improvements.

The assessment of technologies listed in the master list should reflect whether each technology supports and maps back to at least one pillar objective or goal, or a department goal outlined in their 18-month plan(s). This data point can be included as part of the metadata for each technology to assist decision makers in prioritizing the technology list.

Allowing departments the opportunity to review a draft list prior to finalization will create a feedback loop, identify any gaps in data, and quality gate to help ensure that the technologies are in line with needs. Likewise, incorporating a review step with the key stakeholders of the objective will ensure that useful data is being collected for these consumers.

COORDINATION & PARTNERSHIP

Leads for this objective will work with Pillar Coordinators to identify Strategic Plan pillar objective implementation plans that have a technology solution component and review plans to determine if solutions should be included in the master list. This process will include coordinating with respective Implementation Leads as needed.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

The data information solicited through the department survey process will include whether each technology aligns with pillar objectives or goals to include tools that will facilitate both equity in operations and services as well as contribute to reducing the County's climate footprint. These data points will assist decision makers in prioritizing implementation of technologies listed.



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FUNDING

Funding and Fiscal Impact Analysis

The implementation team will make best efforts to formulate an estimated cost range based on information available and best practices associated with each technology solution identified. The implementation team will strive to obtain projected one-time and on-going costs, and if feasible inclusion of costs associated with departmental staffing and ISD labor needs.

Projected Information Systems Department implementation costs for FY 2021-22 are estimated at \$34,875.00 in staff labor. This expense is funded through currently budgeted ISD Replacement A ACO fund balance.

Based on information collected for each project, fiscal strategies may include:

- Identification of available ongoing and one-time funding by department
- Identification of discretionary funds, including available restricted discretionary fund balances with fund purposes that align with proposed technologies.
- One-time use of \$177,081 in available Technology Investment fund balance (Fund 10025). This fund was established by the Board in FY 2001-02 as a one-time general fund contribution for priority technology projects as approved by the Board.
- One-time contribution from Strategic Plan project funding and/or other discretionary funding to the Technology Investment Fund to support one-time costs associated with technological systems acquisition and implementation.
- Strategic Plan Project funding requests submitted for technology needs identified in the Master List.
- ARPA funding requests submitted by departments for technology needs identified in the Master List.
- Potential use of existing, or establishment of new internal services rates for identified enterprise solutions.
- Exploration of multi-departmental cost sharing for technology needs that intersect two or more department operations and/or provide services for shared clients.
- Utilizing grant writing resources to seek grant opportunities (i.e. eCivis grant locator system, County Grant Writer Services, consulting with Grant Writer Program Coordinator).



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ORGANIZATIONAL EXCELLENCE

Goal 1	Strengthen operational effectiveness, fiscal reliability, and accountability
Objective 3	Establish expectations and performance measures for customer service for all county departments
Lead(s)	Peter Bruland, Carol Allen

IMPLEMENTATION IDEAS AND PROJECTS

How approach to implementation helps to achieve the pillar goal

By creating clear standards and consistent metrics for the public, and supporting these metric through internal training, we will be able to increase effectiveness and accountability of customer service through the County

Major Activities

1. Research customer service metrics in other jurisdictions and understand any best practices
 2. Outreach to departments:
 - a. Survey departments to understand customer interactions, existing data collection and metrics, and existing standards
 - b. Form staff workgroup to discuss standards, data collection, metrics, etc.
 3. Community Data
 - a. Review results of Community Satisfaction survey to understand how community interacts with County departments and what areas are important to them
 - b. Determine baseline level of satisfaction, and better understand expectations
 4. Development of customer service metrics
 5. Deployment of measurement tools and begin collecting data
 6. Development of countywide specific standards and goals
 7. Development/enhancement of training curriculum around customer service
-



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8. Provide resources for departments and measure progress in achieving goals

Milestones & Timeline

<ul style="list-style-type: none"> Review results of community satisfaction survey (OE-2.1) for feedback/results to inform development of customer services standards. 	July, 2022
<ul style="list-style-type: none"> Survey Departments to identify types of customer interactions, current customer services standards and metrics in use at the department level. 	Completed January 2023
<ul style="list-style-type: none"> Establish County working group to review data and identify any gaps. 	January – July , 2023
<ul style="list-style-type: none"> In coordination with County workgroup, research Customer Services Best Practices in other Jurisdictions 	August – December , 2023
<ul style="list-style-type: none"> Determine need for engaging services of an outside vendor to establish metrics/standards/goals 	December , 2023
<ul style="list-style-type: none"> Develop and communicate customer service standards and metrics 	January, 2024 – December 2024
<ul style="list-style-type: none"> Conduct training on measurement tools and begin tracking data 	January, 2025 – March, 2025
<ul style="list-style-type: none"> Develop needed ongoing training curriculum 	December 2025
<ul style="list-style-type: none"> Create process for annual reporting on metrics 	December 2025

METRICS

Success Measures

1. Review of current customer service metrics and standards
2. Development of metrics based on best practices and customer expectations



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3. Development of Standards based on best practices and customer expectations
4. Regular reporting on metrics once developed and implemented
5. Regular reporting on progress towards achieving/exceeding standards

There are likely to be gaps in the collection and availability of relevant customer service data. Where feasible, we will work with departments to begin collecting this information, however in some cases it may be too expensive or labor-intensive to collect all relevant information.

COORDINATION & PARTNERSHIP

Intersection with objective 2.1, community satisfaction survey. Implementation leads will coordinate on survey questions and results to inform this objective and determine the need for any additional survey work.

Local agencies will be included in research of customer services metrics and standards in use at their respective agencies. Potential to lead to regional customer services best practices.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

1. The public is the customer and will be included in the initial customer satisfaction survey.
2. Implementation leads will consult with the Office of Equity to establish processes that will apply an equity lens.
3. As part of the work with departments to identify leads, targeted outreach to users of County services (such as surveys of customers or focus groups) will be used to identify concerns and expectations.
4. Consistent County-wide standards will ensure geographic equity since the same standards will apply regardless of location.

FUNDING

Funding Plan:

Funding is not anticipated to be needed for the initial phase of this plan. As the service metrics are defined there are likely to be funding needs for:

- 1) Possible consultant to assist in creation of metrics and protocols.
 - 2) Potential costs around data collection, such as implementation of electronic queueing systems.
 - 3) Potential funding for outreach, including work to identify community expectations.
-



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- 4) Funding for training development and implementation.
-



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ORGANIZATIONAL EXCELLENCE

- Goal 1** Strengthen operational effectiveness, fiscal reliability, and accountability
- Objective 4** Streamline routine administrative procedures and workflows and delegate more signature authority to department heads in order to re-direct work force resources to more strategic priorities.
- Lead(s)** Christina Rivera, Caroline Judy
-

IMPLEMENTATION IDEAS AND PROJECTS

Streamlining routine administrative procedures can improve organizational effectiveness by reducing staff time and as a result create the highest and best use of resources. In sum, implementation will include completing an internal survey and utilizing focus groups to review routine administrative processes to identify improvements that can assist to strengthen operational effectiveness, fiscal reliability, and accountability. Process improvement involves the business practice of identifying, analyzing and improving existing business processes to optimize performance, meet best practice standards or simply improve quality and the user experience for customers and end-users.

Scope

Assess the number and level of resources needed for existing routine administrative procedures, and identify resource intense processes that will benefit from workflow streamlining and increased delegated authority.

Milestones:

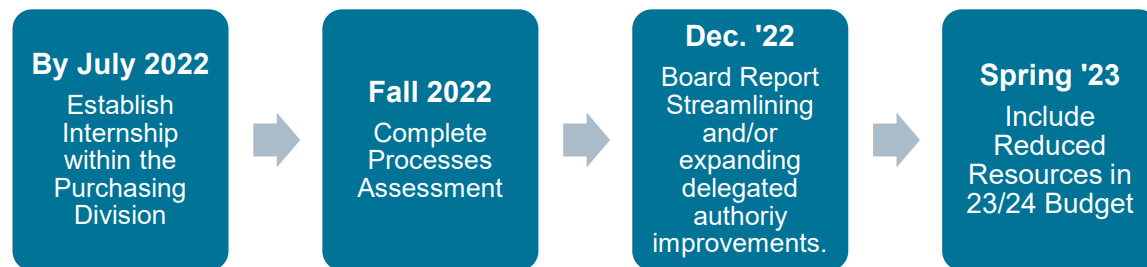
1. Establish a 6-month paid internship to have an individual dedicated to the assessment of administrative procedures.
 2. Survey department/agency management to inventory processes and quantify annual resources invested.
 3. Identify resource intensive workflows.
-



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4. Develop recommendations that once streamline and delegated signature measures are implemented will result in improved use of resources, as well as an augmented fiscal reliability and accountability (transparency).



METRICS

Success Measures

Departments' resources budgeted in FY 2023-24 for specifically identified resource intense administrative processes will reduced by 15% when compared to baseline identified in the Dec. 2022 Board Streamlining and/or expand delegated authority improvements

COORDINATION & PARTNERSHIP

Intersection with other Pillars

Not applicable.

Community Engagement

Not relevant/applicable

There is no intersection with other Pillars for the increased budget appropriations. Likewise there is no partnership or community engagement opportunities for the implementation of increased budget appropriations rather it is internal budget accounting for County departments.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS



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Not relevant/applicable

FUNDING

Funding and Fiscal Impact Analysis

1. Up to \$100,000 one-time for salaries and benefits associated with a 1-year paid internship. Request from Strategic Funds will be necessary.
2. Additional delegated authority and workflow streamlining should result in some cost savings to departments. The December 2022 Board report recommendations will include estimated fiscal savings.



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ORGANIZATIONAL EXCELLENCE

- Goal 1** Strengthen operational effectiveness, fiscal reliability, and accountability
- Objective 5** Align procurement and grant guidelines with strategic priorities and racial equity principles.
- Lead(s)** Christina Rivera, Caroline Judy

IMPLEMENTATION IDEAS AND PROJECTS

Scope

Comprehensive review of Sonoma County's Procurement & Grant Award policies and procedures, which will include living wage compliance, selection criteria, collaboration with cities and other public and educational entities, and develop a local minority and women owned business program.

A comprehensive review of statutory requirements for goods, services, and public-works construction contracting is a significant undertaking. Review will include grant award and funding agreements issued by the Board of Supervisors. The County has adopted Ordinances that augment State of California and Federal procurement legal requirements, and has adopted policies and procedures that guide County departments as they solicit for goods, services or construction work.

The County's procurement and grant award model and processes are a hybrid-decentralized approach where departments are responsible for contracting activities associated with their service requirements, living wage compliance, and contract performance management. The Purchasing division of General Services is responsible for posting solicitation opportunities, ensuring compliance and use of standardized procurement template documents as approved by County Counsel, addressing bid protests, and processing requisitions and vouchers for payments to vendors. Implementation of the Enterprise Financial System created high volume transactional



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workload for the Purchasing division. Staff turnover, long term disaster support assignments, and budget reductions have significantly reduced the level of expertise and support that Purchasing can provide to County departments.

A comprehensive report of procurement and grant award best practices, evaluation of the existing County procurement model and grant/funding agreement processes, and compliance will identify opportunities towards strengthening operational effectiveness, and augmenting fiscal reliability and accountability. Further, the review scope will include identifying measure that will increase the volume of public funds awarded to businesses and non-profit partners that meet equity profiles and advanced the Board's goals Climate Resiliency and augmenting services to disadvantage populations. The recommended consultant report will also evaluate best practices for encouraging greater opportunities for local bidders, green purchasing, minority and women owned contracting, and increased collaborative procurement opportunities with cities and special districts.

Key Activities, Milestones, Timeline

Comprehensive Procurement Study – key activities anticipated to require 12 – 18 months in total to complete:

Dec. 2021	1. Confirm funding for professional services agreement: <i>\$250,000 - \$350,000 estimate</i>
Feb. 2022	2. Identify Public Entities Interested in Participating
Apr. 2022	3. Present RFP to Board of Supervisors for Acceptance
Jun. 2022	4. Award Professional Services Agreement
Jul. '22 to Dec.'22	5. Facilitate and coordinate with consultant and partners entities
Late Jan. '22	6. Collect feedback from community stakeholders I.e. chambers of commerce
Feb. 2023	7. Reviewing and finalizing Consultant Report
Spring '23	8. Present Review and Recommendations to Board of Supervisors

Following acceptance of the report and findings, staff will prepare an implementation plan for the necessary adjustment to policies, procedures, and employee and vendor training.



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METRICS

Success Measures

- Board adoption of the consultant report findings
- Board acceptance of Procurement & Grant Award Redesign Recommendations
- Establish a Women and Minority priority contracting program
- Establish a Green Procurement criteria that will be need to be met before good and services contracts are awarded.

COORDINATION & PARTNERSHIP

Intersection with other Pillars

Racial, Equity & Social Justice pillar intersection will necessitate input from Office of Equity and the Climate Resiliency CAO Division. Engage cities and educational entities to determined interest in creating a regional approach to awarding public funds with the goal of addressing equity and climate resiliency goals.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

Ask local chambers of commerce to provide space and time to collect input from members.

FUNDING

Funding and Fiscal Impact Analysis

The comprehensive Procurement Study will require about \$250,000 in one-time funding for consulting services. In addition, a 0.50 management level staff for 1 year, (approximately \$100,000) which may be accomplished with Extra Help or limited term additional position. The capacity is necessary to coordinate and facilitate with consultant.

CAO staff has identified remaining one-time balance available from the Constituent Management System and Homeless Services review that can be redirected, with Board approval, to this procurement review project.



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ORGANIZATIONAL EXCELLENCE

- Goal 1** Strengthen operational effectiveness, fiscal reliability, and accountability
- Objective 6** Develop training and staffing structures that effectively support disaster services work and emergency operations, particularly for large-scale and ongoing events.
- Lead(s)** Chris Godley, Christel Querijero

IMPLEMENTATION IDEAS AND PROJECTS

How will your approach to implementation help to achieve the pillar goal

As seen in the response to the many recent disasters, County staff are the greatest resource the County can offer our residents. By developing the knowledge, skills and abilities (KSAs) of County staff to support emergency response, continuity of operations, and other Disaster Service worker functions, the County can significantly increase its resilience and effectiveness in major emergencies and disasters.

KSAs may be defined as follows:

- Knowledge – Mastery of facts, range of information in subject matter area.
- Skills – Proficiency, expertise, or competence in given area; e.g., science, art, crafts.
- Abilities – Demonstrated performance to use knowledge and skills when needed.

The Emergency Staff Development program includes identification of staff positions/roles, selection of required and suggested initial/sustainment training, and integration with the County's Learning Management System (LMS). This goal implements the Board of Supervisor's directive to utilize up to 1% of all County staff time to ensure that staff are prepared to serve as Disaster Service Workers. The program currently supports delivery and tracking of training for staff assigned to the Emergency Operations Center (EOC).



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Major Activities

Complete the design of, and implement, the County’s new Emergency Staff Development Program. The comprehensive, targeted, effective, measurable, and sustainable program will prepare County employees and volunteers to serve in a broad range of disaster roles, through individual and collective training – both on-demand and in-person. The program will also integrate tabletop discussion and functional role-playing exercises to reinforce training and provide critical pre-disaster experience.

As all County staff are designated as Disaster Service Workers (DSW), all staff will receive initial and ongoing DSW Awareness training to orient them to potential roles and responsibilities. Many County staff will be assigned specific DSW including supporting the County’s Continuity of Operations (COOP) program, Emergency Operations Center (EOC), Department Operations Centers (DOC), Local Assistance Center (LAC), Congregate Shelters, and Field Damage Assessment. The program will also support the unique role of elected officials. In each area, key DSW positions (ex. EOC Director) are staffed three deep to provide for sustained operations as well as ensure continuity of skills and knowledge as staff rotate out of those positions.

The program will ensure the County remains compliant with state and federal requirements in the Standardized Emergency Management System (SEMS) and National Incident Management System (NIMS).

Timeline and Milestones

Major activities and approximate timelines include:

Pilot offerings via Learning Management System (LMS)	June 2021
EOC team trainings (Operations, Planning, Logistics)	August 2021
EOC software (WebEOC) training for County staff and cities	September 2021
Shelter management training for County staff and cities	September 2021
Offer DSW Awareness Training Course to all County staff	December 2021



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Assess and define KSAs for key DSW assignments	March 2022
Conduct Earthquake scenario EOC functional exercise	April 2022
Assess training participation	May 2022
Develop courses for COOP, LAC, and damage assessment	June 2022
Develop multi-year training and exercise calendar	July 2022
Revise Emergency Staff Development Program Framework	November 2022
Expand training opportunities to cities	December 2022

METRICS

Success Measures

Via the LMS, DEM will monitor training participation indicators including:

- Staff assigned to DSW roles
- Number of staff completing initial and sustainment training courses and exercises
- Percentage of staff attending training by functional area and by department
- Assess the number of training hours relative to the annual requirement for all County staff to spend at least 1% of their time participating in disaster preparedness efforts.

DEM will also regularly assess surveys and feedback from training attendees as well as assess post-disaster after action reports for issues that address staff preparedness or KSAs. DEM to summarize County staff training and exercise participation as part of an annual report to the Board on the state of the Operational Area's disaster preparedness.

COORDINATION & PARTNERSHIP

Strategic Plan Intersection

This project also supports the Organizational Excellence pillar in Goal 3, Objective 3 (Support employee professional growth and retention by investing in high quality training, development, and leadership programs).



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Many of the KSAs that the Emergency Staff Development Program will support will also be used by staff in their regular duties. For example, team skills that are critical in an EOC environment are also important in day-to-day efforts. These include establishing effective working relationships among team members and participating in solving problems and making decisions. DEM will work with Human Resources to identify training opportunities that may benefit additional County staff.

City & Community Partnership

DEM will explore the potential to collaborate with cities, some special districts, and potentially some community based organizations to develop a common core DSW training and exercise program that will promote unity of effort across the Operational Area as well as realize cost-savings in training program management. This may also support the ability of staff in other jurisdictions to quickly integrate and provide support to an impacted jurisdiction.

This collaboration may be integrated and formalized as a component of the proposed restructuring of the County's Emergency Council.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

Public Engagement

This program focuses primarily internally on County staff and potentially support other local governments. There is no direct public engagement component in this program. By strengthening the effectiveness of County staff in responding to disasters and ensuring Continuity of Operations, County residents will receive more effective disaster response and recovery services.

Equity

As part of DSW training opportunities, the program will integrate key elements of the County's pilot *Cultural Competency in Emergency Management* course. As the County's Equity program develops additional training and implementation tools, they will also be incorporated in the emergency staff development program. DEM staff will evaluate the potential to build the pilot training effort into a standing Equity in Emergency Management course.



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Climate

This program will enhance the capability of the County to more effectively address public safety impacts of climate change. Staff will be better prepared to address climate change induced hazards (ex. wildfire), multiple and overlapping incidents, and secondary impacts (ex. public health).

FUNDING

Funding Plan

The program will be supported via ongoing DEM operating budget and ongoing HR LMS contracted services. Development of some custom training courses or courses that may benefit from enhanced video presentation may incur one-time costs. Existing DEM staff to provide program management and oversight.

Seeking external funding to leverage County funds

Homeland Security grant funding may be pursued to develop new or critical in-person training courses and/or exercises. Homeland Security grants generally require a 25% local match.

DEM will monitor the potential to leverage revenue from the proposed 2022 fire fund sales tax to expand and enhance training and exercise opportunities for the County and other jurisdictions in the Operational Area.



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ORGANIZATIONAL EXCELLENCE

Goal 2	Increase information sharing and transparency and improve County and community engagement
Objective 1	Conduct a community satisfaction survey to identify baseline expectations.
Lead(s)	Christel Querijero, Paul Gullixson

IMPLEMENTATION IDEAS AND PROJECTS

How this implementation plan approach helps to achieve the pillar goal

The community satisfaction survey will collect the data needed to inform the County's community engagement work. The subsequent implementation of the community and engagement outreach plan will improve the County's ability to engage community members and increase community access to information.

High Level Strategy

Staff will work with a vendor to develop a community survey tool and implementation plan to support the deliverables associated with Organizational Excellence objective 2.2, which requires the development and launch of a community engagement and outreach strategy, by the end of 2022.

Implementation leads have identified funding efficiencies in combining the vendor selection process for this objective (community survey) with the vendor selection process for OE-3.2 (employee engagement survey). Leads for these two objectives will determine whether a Request for Proposal (RFP) or Request for Qualifications (RFQ) is necessary. They will also explore possible coordination of vendor services for both surveys.

Staff will then work with the selected vendor to conduct the survey, to identify baseline expectations for community satisfaction and engagement. Initial staff research indicates that there are several vendors that provide benchmark data of this nature that provide a comprehensive picture of residents' perspective about local government services, policies, and management.



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The links below provide two examples of community surveys:

<https://public.tableau.com/app/profile/polco.nrc/viz/livermore-ncs/About>

<https://data.austintexas.gov/City-Government/Community-Survey/s2py-ceb7>

Major Activities

- **Community Survey Scoping:** Objective Implementation Leads will research survey tools. Part of this scoping will include coordination with survey vendors to understand survey types, outreach tools, and pricing available.
- **Contract Development:** The Implementation Leads will negotiate a contract with the survey vendor to provide services, whereby a detailed implementation plan will be developed and the timeline and milestones for the community survey will be established.
- **Stakeholder Engagement & Marketing:** Staff will implement a marketing plan, including working with community stakeholders, to promote and increase survey participation.
- **Conduct Survey**

Milestones

• Research Community Survey Best Practices	September 30, 2021
• Identify Potential Vendors	October 30, 2021
• Explore coordinating services and vendors with Implementation Leads for OE-3.2, Employee Engagement Survey	November 30, 2021
• Present to BOS Pillar Liaisons	December 9, 2021
• Conduct RFP if needed and Select Vendor	February/March, 2022
• Develop Marketing Plan for Survey	February/March 2022
• Conduct Survey	June 30, 2022



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• Estimated Survey Completion Date	June 30, 2022
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METRICS

Success Measures

The primary success measures for this objective include:

1. Development of the RFP and vendor selection
2. Design of the survey and sampling plan (for statistical analysis, participation rates may also be used as metric of success)
3. The completion of a benchmark survey that measures community satisfaction that will source future policy decisions for the Board as well as sourcing the development of a community outreach and communications plan as identified by Organizational Excellence Objective 2-2.
4. Presentation of the survey results

Robust community participation in the survey is needed to collect data that reflects the community satisfaction levels throughout our community. Staff will develop a marketing plan and work with community stakeholders to encourage survey participation among hard to reach populations.

COORDINATION & PARTNERSHIP

As mentioned above, Implementation leads will collaborate with the leads of OE-3.2 objective (employee engagement survey) for potential opportunities to coordinate services and vendors. The Office of Equity will be consulted on survey questions and process to apply an equity lens.

The RFQ/RFP/contract for the survey vendor will include stakeholder engagement, including opportunities for partnership with the cities.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

Public engagement will take place during the following milestones:

- **Public Board of Supervisor meetings:**
 - January/February 2022 Strategic Plan implementation plan presentations and funding recommendations



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- **Implementation of Marketing plan:** the marketing plan will include outreach to the public to encourage participation in the survey. Outreach will include strategies to reach populations that are geographically distributed throughout the county.
- **Post-survey outreach and engagement plan:** This objective will be complete after the survey has been conducted. The data from this survey will support the deliverables associated with Organizational Excellence objective 2.2, which requires the development and launch of a community engagement and outreach strategy, by the end of 2022.

Survey participation rates may be used as a metric of success/effectiveness of the engagement approach.

FUNDING

Funding and Fiscal Impact Analysis

Research indicates that the full cost for this customized survey will be \$150,000, including hiring a consultant(s) with expertise in designing, conducting and analyzing surveys. Funding will also cover survey outreach costs. Staff is requesting this money from the Strategic Funds.

Note: Human Resources is submitting a separate, parallel proposal for the employee engagement survey. Coordination of the RFP/RFQ process for these two surveys presents potential cost savings in staff administration time needed to support the vendor selection and contract process.



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ORGANIZATIONAL EXCELLENCE

- Goal 2** Increase information sharing and transparency and improve County and community engagement
- Objective 2** Using results from survey, develop and launch a community engagement and outreach strategy, establish a process for engagement and collaboration, and ensure the strategy is inclusive of all underserved populations by the end of 2022.
- Lead(s)** Christel Querijero, Paul Gullixson
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IMPLEMENTATION IDEAS AND PROJECTS

How this implementation plan approach helps to achieve the pillar goal

The development and launch of the community and engagement outreach strategy will improve the County's ability to engage community members and increase community access to information.

High Level Strategy

This objective is a follow-up to Organizational Excellence objective 2-1, which requires the County to conduct a community satisfaction survey to identify baseline expectations. The survey will be conducted by June 30, 2022. As staff work to engage a consultant to develop, conduct, compile and analyze the results of the survey, they will also continue researching community engagement best practices and identifying the existing engagement practices within the County. The goal for this work is to develop recommendations for an overall County community engagement framework with strategies. A framework and agreed upon strategies will align and support the Board's policies and priorities related to community engagement. To capture and build on the lessons learned through other engagement models used for recent County efforts (e.g. COVID Health Task Force, Redistricting, ARPA, Climate Town Hall, Upstream Investments, etc.), staff with guided facilitation support, will convene community engagement leads within departments/agencies to document successful strategies to inform recommendations for a countywide framework and strategies. These recommendations will also address staff and/or contractor capacity needs for successful, meaningful engagement and



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input. Staff plan to engage community partners on the draft framework and strategies developed for their input. The strategy will have an emphasis on achieving equitable participation and access to government services and resources for communities traditionally underserved and communities of color. Staff are targeting December 2022 to establish a County Community Engagement Framework.

Major Activities

- **Community Engagement Best Practices Scoping:** Objective Implementation Leads will research community engagement best practices, including looking at engagement strategies in other jurisdictions.
- **Contract Development:** Assuming funding is obtained, the Implementation Leads will negotiate contracts for 2 different scopes of work: 1) consultant to convene County staff and document existing community engagement and outreach strategies, best practices, and lessons learned; 2) consultant(s) available for project specific community engagement.
- **Convenings of County staff involved in community engagement:** A series of conversations to review the County’s existing community engagement efforts.
- **Documentation of current community engagement strategies:** An overview of engagement strategies the County is currently using or has used in recent years, along with lessons learned.
- **Stakeholder engagement, community outreach:** Work with community members to develop countywide engagement & outreach strategy.
- **Board of Supervisors adoption and County implementation of engagement strategy**
- **Community Engagement consultant services:** available on an as-needed basis to support the County’s high priority projects.

Preliminary Activities and Milestones

• Research Community Engagement Best Practices	September – December, 2021
• Present to BOS Pillar Liaisons	December 9, 2021
• Conduct RFP and Select Consultant for assessment and documentation of current engagement practices	March –May, 2022
• Conduct RFP and Select Consultant for project-specific community engagement	March-May, 2022



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• Conduct OE-2.1 Community Satisfaction Survey	June 30, 2022
• Meetings with County staff to discuss existing strategies	July/August, 2022
• Documentation of existing practices and lessons learned	August, 2022
• Work with stakeholders to develop Community Engagement Outreach Strategy Options	September, 2022
• Community feedback on proposed outreach strategy options	October, 2022
• Present Community Engagement Outreach Options to the BOS	November, 2022
• Incorporate Feedback from Board	November, 2022
• Board Approves Community Engagement and Outreach Strategy	December, 2022

METRICS

Success Measures

The primary success measures for this objective include:

1. Best practices research
2. Development of RFP and consultant selection
3. Analysis of results of community survey and County's existing community engagement activities
4. Development of engagement plan options/plans
5. Collection of community feedback (# of individuals and CBOs providing feedback)
6. Adoption of County Community Engagement and Outreach Strategy
 - a. Board-approved Community Engagement principles established (could be part of the framework).
 - b. Community Engagement Framework including strategies, models and processes for inclusive engagement finalized and approved by Board.
7. Development of Community Engagement Framework Implementation Plan and accompanying website
8. Creation of Annual Community Engagement Plan to align with Significant Items



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COORDINATION & PARTNERSHIP

This objective has intersections with the Healthy and Safe Communities Objective 5.5 (conduct outreach and engagement campaign with communities to build and strengthen community and law enforcement relationships, including education on the difference between calling 2-1-1 and 9-1-1) and Racial Equity and Social Justice Objective 4.1 (Establish a process for engagement and collaboration with community members and stakeholder groups, and launch a community engagement strategy by the end of 2022 with a focus on racial equity). Implementation leads will work together to align strategies within implementation plans where appropriate.

Partnerships can be formed with local jurisdictions and community-based partners to leverage their contact with the public, especially in target communities. For example, the City of Santa Rosa has the Community Engagement initiatives, as do other jurisdictions. Many community-based partners focus their work in diverse geographic areas of the County, facilitating our need to reach all residents.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

Public engagement will be a central principle in developing the County's community and outreach strategy. The engagement strategy will be partially informed by data from the public via the community satisfaction survey. Additionally, the County will be tasked with working with stakeholders and community groups to create the proposed outreach strategy. Examples of engagement strategies beyond the survey may include town halls, focus groups and stakeholder conversations, advisory committees, and citizen committees.

Public participation rates throughout the development of the outreach strategy may be used as a metric of success/effectiveness of the engagement approach. Furthermore, the success and effectiveness of the engagement strategy will be measured by subsequent community assessment surveys and by other methods including the Portrait of Sonoma, Los Cien Scorecard, etc.

The Office of Equity will be a key partner throughout this process, applying an equity lens to ensure that the adopted outreach strategy meets the needs of the entire community, including communities traditionally underserved and communities of color. Centering the community is essential at crucial steps of the process and the inclusion of community voices in the decision-making process. Vitally important is to geographically identify partners in all areas so that the engagement and information is disseminated in the broadest manner possible.



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Where possible, we will ensure that climate impacts are considered in meetings and information sharing, including holding virtual meetings, limiting printing of collateral, and offering other ways of providing useful information.

FUNDING

Funding and Fiscal Impact Analysis

The development and launch of the community engagement and outreach strategy will require \$250,000 in one-time funding. Costs include \$50,000 for a consultant to 1) facilitate meetings with County staff and document existing outreach strategies, and 2) support the County in working with the community to develop an engagement and outreach strategy. The budget also includes \$200,000 for project-specific community engagement work with consultants. In addition to consultant time, additional costs include stipends and materials for community engagement and focus groups, interpretation and translation costs. Staff is requesting this money from the Strategic Funds.



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ORGANIZATIONAL EXCELLENCE

- Goal 2** Increase information sharing and transparency and improve County and community engagement
- Objective 3** Ensure County budget process and information are understandable, accessible, and in a format that enables the public to identify County investments and funding for major initiatives and services.
- Lead(s)** Peter Bruland

IMPLEMENTATION IDEAS AND PROJECTS

How this approach to implementation helps achieve the pillar goal

All steps in this goal are targeted toward ensuring a well-operating and transparent budget that is a cornerstone of organizational excellence.

Major Activities

Staff are developing a Budget Improvement Road Map based in part on the 5-year Budget Plan that was completed in 2018 and further informed by the Strategic Plan. This plan will increase transparency by:

1. Implementing Service Area Budgeting, under which departmental budgets will be aligned to the primary services provided by those departments for greater transparency and accessibility. This will allow both for internal improvements, including improved automation of reporting, and for a budget that is more understandable and relevant to the public and the Board.
 2. Implementing Performance Metrics which align with the Service Area Budget and enable greater transparency on how funding is used and what results are achieved. Work will begin during the FY 2022-23 budget cycle, but metrics will not appear before the FY 2024-25 budget.
-



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3. Continuous process improvement: in addition, staff will continue to prioritize smaller improvement items. Many of these relate to streamlining internal processes, but some may also address changes to presentation or display of the budget.

In alignment with the goal above, staff will be evaluating the existing budget book and online budget format in order to ensure that the content better reflects county operations.

See attached Budget Improvement Plan for additional details.

Milestones & Timeline

• Launch Service Area Budgeting transition with pilot departments to better understand challenges and opportunities	October, 2021
• Include service area budgets for initial wave of departments in FY 22-23 Budget Book	June, 2022
• Begin work with volunteer departments to develop practices for compiling, monitoring, and reporting metrics.	August 2022
• Survey Departments on metrics that are currently tracked, how they are reported, and how they are used.	December 2022
• Expand Service Area Budgets to all departments and revamp budget narratives around service areas in FY 2023-24 Budget book.	June, 2023
• Develop metrics in conjunction with “early adopter” departments	June 2023
• Develop metrics in conjunction with remaining departments	June 2024
• Assorted continuous improvement items	Ongoing

METRICS

Success Measures

Achievement of milestones as described above.



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Review budget materials with Supervisors and District Directors to assess level of satisfaction and ongoing areas for improvement.

Review 3rd party ratings of budget clarity and transparency provided by Government Finance Officers Association (GFOA).

COORDINATION & PARTNERSHIP

We will look for opportunities for feedback and ideas for improvement over time, including looking at ways to receive feedback on the web tools such as SoCo budget and the online budget documents. In general, the budget document does not receive significant public interest, and so more general opportunities such as surveys or public workshops are not likely to engage significant numbers of people.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

Alignment with Strategic Plan values and principles (including geographic equity, leveraging funds, climate resiliency and equity)

Creating a more transparent budget benefits all users. The budget is primarily accessed online, so there are not significant geographic barriers to its use. As part of the continuous improvement model, staff will consider additional options to further make the budget accessible, including exploring whether the document should be translated, however as a very long document with relatively low readership, there may be other lower-hanging fruit.

FUNDING

Initial Funding Plan

1. The primary need, particularly for early steps, will be staff time. As the County grows more serious about incorporating performance metrics into its presentation of departmental work, the scope of work in the Operations and Budget team will grow. With the existing team already strapped, an additional analyst may be needed to absorb the growing workload in future years, at a cost of approximately \$215,000 annually. The Operations and Budget division has absorbed a significant increase in its workload due to the proliferation of funding sources in the Non-Departmental budget and the detailed level of management demanded for these new areas. Staff may look to leverage these funds in order to support administrative work, which would free up existing general fund to support the new position. Staff will review the need on an ongoing basis and may request the new position during the coming years.
-



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2. Staff will focus on leveraging existing systems to handle new operations, such as presentation of the budget and compilation and presentation of performance metrics. This should limit the cost of the item.
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ORGANIZATIONAL EXCELLENCE

- Goal 2** Increase information sharing and transparency and improve County and community engagement
- Objective 4** Develop a new website that is more customer friendly, community focused, and supports County and community needs by 2022.
- Lead(s)** Paul Gullixson, Jeff Deffenbaugh, Sherry Bevens

IMPLEMENTATION IDEAS AND PROJECTS

The new website will simplify the process of sharing information via the web. Community members will see increased accessibility and improvements in the website's user experience, finding what they need when they need it. Internal county users will find the system easier to navigate and more intuitive, allowing departments to more effectively share information with the public.

Scope

Over the past 18 months, the County Administrator's Office (CAO) in partnership with the Information Systems Department (ISD) embarked on two efforts to improve County websites:

- (1) The Content Management System (CMS) replacement project includes a complete redesign of the County website. The new system will add more value to our County constituents by promoting a more modern look and feel, improved search functionality and results in an easy to use CMS. A strong focus on Americans Disability Act (ADA) compliance and Spanish translation ensures that we reach broader segments of our population. This implementation project has been underway for the past 6 months and nearing completion of phase I, which includes the conversion of external facing county websites.
 - (2) A redesign project to improve the SoCo Emergency website striving for a more organized, simpler site for emergency management. This project was completed in June 2021.
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Major Activities

- Detailed requirements gathered from most County departments in order to understand current issues, hear feedback from their customers' likes and dislikes.
- Design phase conducted by project design team made up of multiple departments across the County to ensure a collaborative design process. Standard project management metrics have been used throughout the project, such as review sessions on design of site conducted with design and leadership teams.
- Project status reporting shared regularly to ensure that stakeholders are informed of progress.
- Migration in progress of more than 6,000 pages from current County site and microsites.

Milestones & Timeline

• Board Approval	November 19, 2019
• Project Kickoff	December 5, 2019
• Website Design	January 2021
• Website Build	May 2021
• Migration	October 2021
• Training	October 2021
• Quality Assurance / Testing	October – December 2021
• Go Live	Q1 2022

METRICS

- Once the implementation is complete, we will conduct an internal survey amongst users to understand the success of the redesign and implementation.
 - Overall look and feel



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- Usability
- Intuitiveness
- Search functionality improvement
- Metrics
 - Webtrends and Google Analytics
 - Page views
 - Time on page

COORDINATION & PARTNERSHIP

Social Justice Objective 4.1 (Establish a process for engagement and collaboration with community members and stakeholder groups, and launch a community engagement strategy by the end of 2022 with a focus on racial equity)

The county website is an important tool used to communicate and engage our communities. By increasing accessibility, the improved website will allow all community members to more easily navigate the content which we are sharing and promoting.

Social Justice Objective 4.4 (Develop and establish a language access policy for the County of Sonoma by end of 2021)

The new website will be immediately translatable via Google translate, and will feature tools we anticipate to utilize in a future phase. This will allow us to create an exact copy of certain pages or the entire site for translation, subject to board direction and financial allowance for translation.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

We will inform the public of the new website through social media and in discussions with community partners. We will plan outreach to key stakeholder groups to highlight the features of the website that most impact their members.

The improved translation features of the new website will increase access for non-English speakers, adding a language justice and equity component to this project.



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Having information more easily accessible via the new website will reduce trips for the public to county offices, reducing CO2 emissions and helping the County achieve its climate goals.

FUNDING

Information in Progress – Fully Funded Project

Funding for the estimated \$200K in FY 2021-22 implementation expense is funded by currently budgeted use of fund balance from ISD Replacement A ACO funds. Once live with the new CMS system, ongoing funding for the product support and maintenance will continue via existing cost allocation and recovery methods used to support County website technologies and staff.



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ORGANIZATIONAL EXCELLENCE

Goal 2	Increase information sharing and transparency and improve County and community engagement
Objective 5	Develop strategies that improve information and knowledge sharing within and between County departments.
Lead(s)	Christel Querijero, Christina Cramer

IMPLEMENTATION IDEAS AND PROJECTS

How the implementation approach helps to achieve the pillar goal

By improving information and knowledge sharing within and between County departments, the County will increase its capacity for information dissemination, allow for greater transparency of cross-County department and agency activity, and promote organizational learning.

High Level Strategy

Staff will assess the current levels of internal information and knowledge sharing within and between County departments to determine where there are gaps in sharing and opportunities for improvement. Once this baseline is established, staff will conduct research on best practices and prepare recommendations for strategies to achieve this objective. This research will involve employee and stakeholder engagement, and seeking input on strategies and prioritization. Staff will then develop a project proposal and the accompanying funding plan necessary to implement new strategies.

Major Activities

1. **Baseline assessment:** Staff will identify the existing level of information and knowledge sharing within and between County departments. They will solicit feedback from Department Heads and coordinate with the
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development of the Employee Engagement Survey (OE-3-2) to include questions about information and knowledge sharing.

2. **Project scoping:** Staff will research information and knowledge sharing strategies to address the gaps and opportunities identified in the assessment data. Scoping will include consideration of strategies that build on existing knowledge sharing models within the County such as SoCo HIGHER and SoCoLERN. Staff will also research new approaches ranging from low-cost options such as drop-in networking events to higher-cost mentoring and coaching models. Communication strategies such as staff newsletters and intranet tools that support operational data sharing will also be considered.
3. **Stakeholder engagement:** Implementation leads will share the project scoping findings with stakeholders to receive feedback. Examples of stakeholders include Office of Equity and labor organizations.
4. **Develop project proposal and funding analysis:** Staff will develop a proposal to implement information and knowledge sharing strategies, including an analysis of associated costs and funding options.
5. **Implementation and evaluation:** Staff will implement strategies, evaluate the results, and make program improvements as needed. There is an opportunity to incorporate evaluation questions into the employee survey that will occur every 2-3 years (included in implementation plan for OE Objective 3.1).

Milestones & Timeline

• Incorporate questions related to information/knowledge sharing in employee engagement survey (OE 3-2)	June 30, 2022
• Baseline assessment: 1) data from Employee Engagement Survey, 2) Department Head feedback	September 2022
• Project scoping: compile list of potential strategies	March 2023
• Stakeholder engagement: request feedback on list of strategies	August 2023
• Proposal & funding plan development	December 2023
• Implement new strategies and evaluate results	December 2024



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METRICS

Success Measures

The primary success measures for this objective include:

- (1) Completion of employee survey, project scoping, and stakeholder meetings
- (2) Design of the information and knowledge sharing strategies
- (3) Number of employees participating in information and knowledge sharing strategies
- (4) Increase in levels of employee information and knowledge sharing demonstrated in future employee surveys

COORDINATION & PARTNERSHIP

This objective does not have any significant intersections with objectives in other pillars. It does have some connections to strategies associated with the following Organizational Excellence objectives:

- *OE 1.2: Establish a master list of technology needs that support operational/service improvements by mid-2022, identify enterprise solutions, and develop fiscal strategies to fund and implement improvements.* This scoping phase of Objective 2.5 may result in the identification of technology to support information and/or knowledge sharing.
- *OE 3.2: Conduct an employee engagement survey by mid-2022, and based on survey data, develop and implement strategies to incorporate survey outcomes into future operational planning.* The implementation plan for Objective 2.5 proposes that one or more questions related to information/knowledge sharing be included in the employee engagement survey to collect baseline data.

Implementation leads of this objective will stay in communication with the leads of the objectives above to discuss opportunities for collaboration.

This is an internally focused objective with strategies aiming to increase internal information and knowledge sharing. However, during the scoping project staff will consider whether there are opportunities to partner with cities and community partners to share resources related to information and knowledge exchanges.



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COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

As previously stated, staff will look for opportunities to engage the broader community as part of the implementation of this objective. The primary engagement will be with County staff. The metrics above include data to measure the effectiveness of employee engagement, including tracking the number of employees that participate in the County's information and sharing strategies.

The strategies for this objective will be designed to maximize employee participation equitably and at all levels of the organization.

FUNDING

1. The baseline assessment, project scoping, and stakeholder engagement work will be incorporated within normal budget activities.
2. Once the knowledge and information sharing strategies have been selected for implementation, additional funding may be needed. The amount will depend on the selected strategies.



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ORGANIZATIONAL EXCELLENCE

Goal 3	Become an employer of choice with a diverse workforce that reflects our community, and an employer of choice with a positive work culture that builds engaged and developed employees.
Objective 1	Implement programs and identify opportunities to support employee work-life balance and a positive work culture, including a Telework Policy.
Lead(s)	Carol Allen

IMPLEMENTATION IDEAS AND PROJECTS

How the implementation approach helps to achieve the pillar goal

1. Surveying current employees will provide the data needed to evaluate the current work culture with existing programs in place and identify areas for improvement.
2. Surveying outside agencies and companies will provide information on new programs for consideration.
3. New programs and training if responsive to employee feedback will lead to a more positive work culture and improved employee retention.

Major activities

1. Complete Implementation of Countywide Telework Policy and evaluate its effectiveness one year from implementation.
 2. Coordinate with the development of the Employee Engagement Survey (OE-3-2) to include questions about work-life balance and work environment and solicit employee suggestions for programs/opportunities.
 - a. Evaluate survey results and consider new or enhanced programs that could be responsive to employee feedback.
-



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- b. Establish a working group to evaluate, recommend, and develop options for consideration and implementation.
- 3. Outreach to outside agencies/companies
 - a. Create comprehensive list of current County programs.
 - b. Conduct a survey of selected agencies/companies to identify gaps and possible programs to evaluate/consider.
- 4. Review and Develop/Enhance supervisor/manager training curriculum, tools, and resources for creating a positive work environment.
 - a. Identify relevant on-line classes and advertise to appropriate audiences.
 - b. Develop new curriculum as needed.
- 5. Communicate/Advertise County programs and commitment to work/life balance and positive and inclusive work culture in recruitment /marketing materials and internally.

Milestones & Timeline

<ul style="list-style-type: none"> • Complete Implementation of Countywide Telework Policy 	January, 2022
<ul style="list-style-type: none"> • Identify and communicate currently available training curriculum 	February, 2022
<ul style="list-style-type: none"> • Incorporate questions related to work-life balance and work environment in employee engagement survey (OE 3-2) 	May, 2022
<ul style="list-style-type: none"> • Begin Evaluating Survey results 	June, 2022
<ul style="list-style-type: none"> • Outreach to outside agencies/jurisdictions 	September , 2022
<ul style="list-style-type: none"> • Establish Working Group to begin reviewing data 	December , 2022
<ul style="list-style-type: none"> • Evaluate data and identify potential options for consideration. 	Jan – June, 2023
<ul style="list-style-type: none"> • Communicate/Advertise County programs and commitment to work/life balance and positive work culture in recruitment /marketing materials and internally. 	September , 2023



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<ul style="list-style-type: none">• Develop new training curriculum as needed	December , 2023 and on-going
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METRICS

Success Measures

1. Employee exit survey responses show satisfaction with work-life balance and work culture.
2. Annual review of turnover statistics indicate stability or reduction of voluntary resignations year over year.
3. Employee survey results every 2-3 years that show majority of survey respondents:
 - Are aware of new and existing programs
 - Are participating in new and existing programs

COORDINATION & PARTNERSHIP

Coordination with other Objectives

Intersection with Organizational Excellence Objective 3.2 (Conduct an employee engagement survey by mid-2022, and based on survey data, develop and implement strategies to incorporate survey outcomes into future operational planning.) This survey will include questions about work life balance and solicit employee suggestions.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

How the proposed activities and efforts uphold the values and principles identified in the strategic plan, including geographic equity, leveraging funds, climate resiliency and equity

This goal has an internal focus on County employees. Engagement will be with the employees and the labor representatives. Outreach will include other agencies to identify potential additional programs.

Specific to the telework policy, telework contributes to climate objectives because remote workers are not commuting, thereby reducing greenhouse gas emissions.



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Implementation lead will strive for diversity on the working group and set expectations for a focus on equity in consideration and communication of new and existing opportunities and programs.

We will work with Office of Equity to ensure we are applying an equity lens to the development and implementation of programs and metrics.

FUNDING

Initial recommendation for a funding plan?

1. Initial one-time funding of \$100,000 will be needed for the employee engagement survey to hire a consulting firm specializing in this area to develop, administer and provide survey results. The request for funding is under the OE 3.2 objective. However, it should be noted that this funding will be critical for the accomplishment of this objective.
 2. The initial survey will be a one-time expense. Subsequent surveys for purposes of metrics and further program development will require additional funding. Subsequent surveys that do not require design work may be less than \$100,000.
 3. The development of the telework policy is currently being accomplished with existing resources. Implementation of new programs will be limited without additional FTEs.
 4. Additional funding needs are unknown and will depend on new initiatives and/or training program costs. These needs will be requested in subsequent budgeting cycles.
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ORGANIZATIONAL EXCELLENCE

- Goal 3** Become an employer of choice with a diverse workforce that reflects our community, and an employer of choice with a positive work culture that builds engaged and developed employees.
- Objective 2** Implement programs and identify opportunities to support employee work-life balance and a positive work culture, including a Telework Policy.
- Lead(s)** Carol Allen
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IMPLEMENTATION IDEAS AND PROJECTS

Conducting an employee engagement survey will provide the baseline data needed to assess the current work culture and to identify opportunities for improvement.

Major activities

1. Survey partner agencies to identify any that have conducted an employee engagement survey
 2. Identify potential vendors
 3. Determine if RFP is necessary
 4. Explore coordinating services and vendors with Implementation Leads for OE-2.1, Community Survey
 5. Compete for funding
 6. Conduct an RFP as needed to contract with a vendor to assist with the design, development, implementation, data collection, and analysis of the survey
 7. Identify and engage stakeholders regarding questions to include in the survey
 8. Engage Labor Representatives with the objective of getting Labor's active support in engaging union employees to participate
 9. Develop a communication and outreach plan to increase participation in the survey
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10. Conduct Survey
11. Analyze survey results
12. Establish a cross-county working group to review survey results and develop strategies to address outcomes
13. Evaluate options, engage appropriate stakeholders, plan, develop and implement new programs/policies
14. Conduct subsequent surveys to assess progress and to inform continued need for program/policy development.

Milestones & Timeline

<ul style="list-style-type: none"> • Survey partner agencies and identify any that have conducted an employee engagement survey 	September , 2021
<ul style="list-style-type: none"> • Identify potential vendors 	October , 2021
<ul style="list-style-type: none"> • Explore coordinating services and vendors with Implementation Leads for OE-2.1, Community Survey 	November , 2021
<ul style="list-style-type: none"> • Compete for Funding (\$5million) 	January/February, 2022
<ul style="list-style-type: none"> • Conduct RFP if needed and Select Vendor 	February/March, 2022
<ul style="list-style-type: none"> • Identify and engage stakeholders and labor representatives 	February/March 2022
<ul style="list-style-type: none"> • Develop communications plan 	April ,2022
<ul style="list-style-type: none"> • Conduct Survey 	June , 2022
<ul style="list-style-type: none"> • Establish a cross County working group to begin evaluating data 	December, 2022
<ul style="list-style-type: none"> • Evaluate options, engage appropriate stakeholders 	January-June, 2023



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<ul style="list-style-type: none"> Request funding for program implementation as needed 	January , 2023 and on-going
<ul style="list-style-type: none"> Plan, develop and implement new programs/policies as needed 	April – December 2023 and on-going
<ul style="list-style-type: none"> Conduct subsequent surveys no sooner than every 2 years to assess progress and to inform continued need for program/policy development 	2024 and on-going

METRICS

Success Measures

1. Achieve acceptable survey participation rate based on vendor recommendation for average survey responses.
2. Subsequent survey data to show improvement to ratings.
3. Favorable survey ratings on programs and initiatives implemented as a result of survey outcomes.

COORDINATION & PARTNERSHIP

Coordination with other Objectives

Intersection with OE- 2.1 – Conduct a community satisfaction survey to identify baseline expectations.

- Explore if efficiencies can be gained by coordination of external and internal survey efforts.

Intersection with OE Goal 3, Objective 1 – Implement programs and identify opportunities to support employee work-life balance and a positive work environment, including a Telework Policy.

- Include survey questions on work-life balance and work environment to obtain data on potential programs/opportunities.

This internally focused objective will not involve coordination with city/county partners.



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COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

This objective is internally focused on County employees. Focus will be on including strategies to maximize employee participation equitably and at all levels of the organization.

Implementation lead will strive for diversity on working group and consult with Office of Equity on questions and process to apply equity lens.

FUNDING

Human Resources staff does not have the capacity or expertise to design, conduct, and analyze an employee engagement survey. Request of \$100,000 from Strategic Funds will be necessary.

Initial activities prior to the survey will be accomplished with existing HR staff within existing budget.

As listed in the milestones, we surveyed partner agencies and identified three Counties that have conducted an employee engagement survey. The three Counties are Solano, San Mateo, and Santa Clara. Costs to design conduct and analyze the surveys ranged from \$64,400 - \$150,000. Since we have very specific objectives we are planning to accomplish for this objective and OE- 3-1, we will not be able to use an off the shelf survey. Our survey will require customization. We anticipate we will need \$100,000 to hire a consultant with expertise in designing, conducting and analyzing employee engagement surveys to meet this objective. The initial survey will be a one-time expense. Subsequent surveys for purposes of metrics and further program development will require additional funding. Subsequent surveys that do not require design work may be less than \$100,000.

As included above, we will be exploring potential efficiencies that can be achieved by coordinating with the Implementation Leads on the community survey.



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ORGANIZATIONAL EXCELLENCE

- Goal 3** Become an employer of choice with a diverse workforce that reflects our community, and an employer of choice with a positive work culture that builds engaged and developed employees.
- Objective 3** Support employee professional growth and retention by investing in high quality training, development, and leadership programs.
- Lead(s)** Christina Cramer
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IMPLEMENTATION IDEAS AND PROJECTS

County employee demographic data shows that diversity in the County's entry-level positions is promising and getting progressively closer to the community's demographics of Sonoma County. An important strategy to diversifying the supervisory, management, and executive management levels will be through internal promotions from this diverse base of employees. Ensuring employees are developed through high quality professional development training will make them stronger candidates for promotional opportunities within the County, and will also contribute to building engaged and developed employees.

Major activities

1. Develop a process for updating core performance competencies for each major level of employment (foundational, supervisory, managerial, executive).
 - a. Engage employees at all levels of the organization in the process of updating existing competencies (using survey, focus groups, interviews, etc.) ensuring diversity, equity and inclusion in the process.
-



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2. Review course offerings and identify/develop additional courses as needed for each County employment level that includes a mix of in-person Instructor Led Training (ILTs), Virtual Class Training (VCTs), and on-line courses.
3. Develop an entry/middle management employee development “academy”.
4. Continue the executive leadership program (SoCoHIGHER).

Milestones & Timeline

<ul style="list-style-type: none"> • Compete for Funding (\$5million) 	January/February, 2022
<ul style="list-style-type: none"> • Continue the executive leadership program (SoCoHIGHER) 	March , 2022 and on-going
<ul style="list-style-type: none"> • Develop a process for updating competencies for each level of employment. 	September , 2022
<ul style="list-style-type: none"> • Review current training course offerings and identify/develop courses for each employment level. 	January , 2023 and on-going
<ul style="list-style-type: none"> • Develop an entry/middle management employee development “academy”. 	February , 2023
<ul style="list-style-type: none"> • Review programs annually for effectiveness and update as needed. 	December , 2023 and on-going

METRICS

Success Measures

1. Participation in Training statistics (How many?, Who?, Frequency? etc.,).
2. Training class and course evaluations average satisfactory or better.
3. Exit Survey results indicate employees are leaving for reasons other than lack of training and development.
4. County promotional data reflects an increase in internal promotions over time.



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5. Employee Survey data indicates employees are being supported in their professional growth and given training and development opportunities.

COORDINATION & PARTNERSHIP

Coordination with other Objectives

Intersection with Racial Equity and Social Justice (RESJ) Goal 1 – Objective 2 – *Invest in an ongoing and continually developing racial equity learning program, including understanding the distinction between institutional, structural, interpersonal, and individual racism for County leadership and staff by end of 2021.*

- Coordinate with implementation lead on competencies and identify training for academies as appropriate.

Intersection with RESJ Goal 2 - Objective 1 – *Identify opportunities to enhance recruitment, hiring, employee development, and promotional processes to reflect the value of having the perspectives of people of color represented at all levels in the County workforce.*

Partnerships with cities - Re-establish the opportunity for cities to access County training programs on a fee basis.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

This objective is internally focused.

We will consult with the Office of Equity to ensure we apply an equity lens through the process beginning with the review of competencies.

As included above, we will collaborate with cities to re-establish opportunities for cities to access County training programs on a fee basis.

On-line training reduces employee travel and Greenhouse Gas Emissions in support of the County's climate objectives

FUNDING

The investment in a Learning Management System in 2019 has provided significant potential to efficiently deliver more training, but budget dollars and capacity of 3.5 FTE limits HR's ability to improve and expand program



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offerings. The increasing demands being made on the LMS and the HR-WorkDev staff as well as the County's experience with the LMS over the last two years indicate that additional resources are needed to meet this objective. To create capacity to develop high-quality comprehensive customized County training programs for supervisors and mid-managers will require an increase to the current funding for training and organizational development consulting services by \$50,000 in FY 22/23 and \$25,000 on-going. The addition of this funding will give the Workforce Development Manager and existing HR Training Analyst the capacity to focus on overall County training program development, curriculum and content development, communication, marketing, delivery of in-classroom training, management of training vendors, development of expertise in existing and future Virtual Learning Environments (VLEs) e.g., Zoom, WebEx, MS Teams, Ring Central, to meet County strategic objectives and to evaluate the County's training program with an equity lens. The current Workforce Development division in central Human Resources has a total FY 21/22 budget of \$946,298 which includes a staff of 3.0 FTE and .5 FTE for system administration related to the learning management system. Using the approximate average employee headcount of 3,800, the training program translates to an average amount spent on training of approximately \$250 per regular employee. Extra-help employees also participate in the training programs with some mandatory trainings. Including the approximate number of extra-help employees, the amount spent on training per employee is approximately \$210. Human Resources provides training to the entire County organization and all special agencies/districts. Following is a summary of the many areas the County training program covers: the executive leadership program; general professional development such as trainings for new and aspiring managers and supervisors on topics such as transitioning to supervision, foundations of supervision, performance management, conflict resolution, effective communication, customer service; introductory trainings to diversity awareness; mindfulness, mandatory sexual harassment; new employee orientation; workplace safety; and general office and computer skills. Within the County, the Human Services Department has a robust in-house training program to meet extensive mandated and technical training requirements, and general professional development trainings. HSD's total FY 21/22 training budget is \$1,930,160 with a staff of 7.4 FTEs. There are approximately 1,000 employees in HSD. This translates to an average of approximately \$1930 spent on training per employee. HSD's training program includes leadership and supervisory training in addition to mandated and technical job specific training. The above provides perspective and demonstrates that the central training program in Human Resources that is intended to provide services to the full organization is limited in its ability to provide a robust training program. Because the program has such limited capacity, departments have used their own budgets to hire/develop general professional development trainings through the use of consultants because central Human



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Resources could not meet the need in a timely manner. This is not optimal for purposes of cross-County consistency.



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ORGANIZATIONAL EXCELLENCE

Goal 4	Seek out grant funding to enhance programs and improve infrastructure
Objective 1	Secure a total of \$60 million in grant funding by 2026 for strategic priorities, including technology tools, climate resiliency, and other capital projects.
Lead(s)	Christel Querijero

IMPLEMENTATION IDEAS AND PROJECTS

How approach to implementation helps to achieve the pillar goal

This approach aims to secure grant funding in a strategic manner to enhance the County's work.

High Level Strategy

The County Administrator's Office (CAO) will accomplish this objective in collaboration with other County agencies, departments, and community partners. Staff have already had success in leveraging funding for strategic priorities, including State Coastal Conservancy Wildfire Resilience Grants and a FEMA Building Resilient Infrastructure and Communities Grant (BRIC) for the County's vegetation management work.

Staff will build upon this success to further leverage grant funds, with an emphasis on funding needs identified in the Strategic Plan implementation plans. The CAO's Policy, Grants and Special Projects (PGSP) team will continue to work closely with the County's Legislative staff to identify existing state and federal funding opportunities.

Similarly, the CAO's Climate Action and Resiliency Division (CARD) will be closely tracking climate-related state and federal funding opportunities and applying, or helping others apply, to the appropriate funds. Additionally, the CAO will coordinate the countywide grant steering committee, helping provide resources, share information, and track grant seeking activities throughout the departments/agencies. Internal grant research and writing capacity will be supplemented with contract consultant grant services.



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Major Activities

1. Determine funding needs associated with strategic plan objectives.

- a. Implementation Leads will develop funding plans for the implementation of each objective.
- b. PGSP staff will work with Implementation Leads to identify any gaps in funding for each objective and work with the County's grant consultant to find potential grant opportunities to fill these gaps.
- c. PGSP staff will support departments/agencies in increasing project readiness for projects prioritized in the Strategic Plan. Staff will develop lists by category/area of shovel ready projects that are updated regularly to take full advantage of funding opportunities that often have quick turnaround.

2. Funding advocacy.

- a. PGSP staff will support CAO Legislative staff in determining alignment between Strategic Plan efforts and the County's Legislative Platform. This is an opportunity to elevate specific legislative issues/asks that need advocacy.
- b. CAO Legislative staff will work with state and federal lobbyists to raise awareness about the County's prioritized funding needs, focusing on strategic priorities.
- c. Staff will look for opportunities to leverage advocacy capacity by working with other jurisdictions. For example, staff will seek legislative actions that offer funding opportunities to more than one jurisdiction.

3. Identify funding partnership opportunities.

- a. PGSP staff will create a list of funding partners including existing partners and potential entities for future funding collaboration.
- b. County staff will build on existing partnerships such as those relationships with Regional Climate Protection Authority and local jurisdictions to pursue further joint funding opportunities.
- c. County staff will develop new relationships to explore partnerships that may increase grant proposal competitiveness, for example working collaboratively with Bay Area jurisdictions to identify regional funding opportunities.

4. Develop timeline and funding plan to secure \$60 million in grant funding for strategic plan implementation by 2026.



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- a. PGSP staff will work with grant consultants to develop the funding plan, outlining potential grant sources for each strategic plan objective.
- b. The plan will include funding for the entire grant process including staff or consultant time spent on the application, project implementation, and reporting.

5. Implement plan and track results

- a. Staff, consultants, and/or partners will track funding opportunities, apply for grant, and oversee the grant lifecycle from start to finish (including managing the contract/agreement, implementing or tracking programmatic deliverables, handling invoicing and reporting).
- b. Implementation will include opportunities for funder relationship building and analysis for when we don't receive funding that we pursued. We will specifically seek feedback from the funder to know how to better position for future opportunities.
- c. Staff will maintain tracking system to measure progress in meeting \$60 million grant funding goal by 2026.

Milestones & Timeline

• Review all SP implementation plans and create combined list of funding needs	February/March 2022
• Develop lists of shovel ready projects	April 2022 (updated on an ongoing basis)
• Create list of funding priorities within County's Legislative Platform; followed by ongoing advocacy for funding	Summer 2022 (updated on an ongoing basis)
• Compile list of funding partnership opportunities	August 2022 (updated on an ongoing basis)
• Develop funding plan	By December 2022
• Funding plan implementation	January 2022-June 2026
• Funding plan tracking and reporting	January 2022-June 2026



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METRICS

Success Measures

- Completion of funding plans and overview of expected needs as part of Implementation Plans for all Strategic Plan objectives.
- Identification of specific funds needed for strategic objectives.
- \$60 million in grants received by 2026 to fund the County's strategic priorities.
 - X\$ in grant funds awarded
 - X\$ in grant and other funds leveraged

In addition to metrics on how much grant funding is secured, staff will work with Implementation Leads for objectives that include grant funding to collect data that demonstrate the overall impact of this funding. These metrics will vary greatly depending on the project, and could include metrics such as GHG emissions reductions, or the number of new technologies installed..

COORDINATION & PARTNERSHIP

This objective intersects with the following grant funding objectives:

- Climate and Resiliency 1-3: Leverage grant funding to support sustainable vegetation management program.
- Resilient Infrastructure 4-1: Leverage funding and seek grants to expand communications infrastructure within the community to improve equitable access to broadband, wireless, and cell phone services.
- Resilient Infrastructure 4-2: Leverage existing fiber optic infrastructure and grant opportunities to expand wireless and broadband access across County.

The PGSP team will monitor the overall grant activities of all of these objectives, providing support and information sharing through the Grant Steering Committee. Implementation Leads will be encouraged to work together when possible in grant seeking and grant tracking activities.

The County will conduct outreach to local cities and organizations to explore joint grant applications for funding opportunities that have a local focus. Staff will reach out to other Bay Area jurisdictions to facilitate potential



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collaborative grants with a regional focus. Building on the model used for the American Rescue Plan Act of 2021, the County will look for opportunities to engage the community in the equitable distribution of funding. Grants often have fast turnaround times for applications, which can limit opportunities for community outreach during the grant application process. The ideal time to engage the community include in the process is during project scoping, prior to the grant application period.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

By aligning funding with the Strategic Plan, the values and principles of geographic equity, climate resiliency and equity will be upheld.

FUNDING

Most work on implementation will be incorporated within normal budget activities. The County allocates funding to grant researching and writing on an annual basis. In FY 21-22 the County budgeted \$150,000 for grant research and on-call grant writing. Beyond staff and consultant costs, there will not be additional fiscal impacts or funding needs.



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RACIAL EQUITY AND SOCIAL JUSTICE

- Goal 1** Foster a County organizational culture that supports the commitment to achieving racial equity
- Objective 1** Establish an Equity Core Team by mid-2021 to advance equity initiatives across all departments in collaboration with the Office of Equity
- Lead(s)** Alegría De La Cruz

IMPLEMENTATION IDEAS AND PROJECTS

The Equity Core Team was established in late April 2021. Currently the Core Team has 75 representatives from 25 of 26 County departments and agencies. The Core Team has met several times since its creation to begin team building and level setting. By building this team and creating a training cohort, we are developing the substantive and emotional/interpersonal skills to support embedding equity throughout the County.

- 1) The Core Team will develop and receive the Racial Equity Learning Program from September to December, 2021
 - 2) Core Team will form affinity groups from September to December, 2021
 - 3) Upstream Investments and Office of Equity will receive and apply the Equity + Results Based Accountability (RBA) training related to the ARPA funding distribution process from August through December 2021.
 - 4) Core Team members will be offered an option to participate in a train-the-trainer module to support
 - a. the development of department-specific training
 - b. training the Board of Supervisors & Department Heads
 - 5) Supervisors, Department Heads & the Upstream Investments Policy Committee will receive Racial Equity Learning Program training in Spring 2022
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- 6) Create a directory of all Core Team members. This will support the creation of an “intentional learning and doing community” and to build connections between and among Core Team members.
- 7) The Office of Equity will coordinate Core Team member efforts across departments to ensure we share information, elevate best practices, and identify shared challenges and solutions at a County-wide level.
- 8) The Core Team will provide for different options for members to consider to assist in the operationalization of equity work in each department...Coordinating versus connecting?

METRICS

- Number of employees per department on the Core Team
- Number of hours spent on Core Team equity work (tracking in payroll)
- Number or presence of equity workgroup(s) in departments
- Number of trainings delivered by Core Team members
- Number of active initiatives led supported by Core Team members

COORDINATION & PARTNERSHIP

This objective is grounded in collaboration and partnership across departments. It has a few intersections with Organizational Excellence and Healthy & Safe Communities. Collaboration will be facilitated through OoE/Core Team member engagement with those departments, department heads, and pillar leads through monthly meetings and the creation and utilization of an equity tool for introduction and use at the end of the training program (Summer 2023).

The OoE will begin to develop a more permanent External Core Team after the ARPA Equity Work Group has finished its work to allocate ARPA funds toward the end of 2022. The OoE also intends to survey municipalities within the County. These two tasks provide opportunities for strategic partnerships outside of the County workforce.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS



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The expectations of Core Team members include deepening connections between their work and the communities they serve. In that way, Core Team members will be bringing the perspectives of the communities they serve into their daily work.

The Core Team will also be organized by racial affinity groups. This allows for Core Team members to be able to engage in the creation and maintenance of safe and brave spaces to support equity work.

The Core Team was designed to ensure that the full value of BIPOC staff and leadership is brought to the work of public service at the County of Sonoma. The Core Team was designed to disrupt traditional hierarchies; to acknowledge and celebrate the value of lived experience in our professional work; and to unlock this skillset for daily use in public service to transform and strengthen the sense of belonging of BIPOC staff and leadership and the communities we serve.

FUNDING

The Office of Equity is funded completely by the General Fund.

Office of Equity staff salaries are fully funded within its approved budget, and the creation of the Core Team has not yet required additional funding. However, the creation of the Core Team was controversial and difficult. Many departments did not have unrestricted resources to support their staff's participation, and interested staff were not authorized to participate in Core Team membership. Ideally, equity work is embedded in everyone's job as a public servant in the County of Sonoma. Practically, many departments require additional resources to begin this work. For example, creating and funding dedicated equity analysts to serve each department would assist each department to have the support and resources inside of their departments while maintaining a central, coordinated hub.

Currently the Office of Equity has no capacity to seek external funds. We would need a grant writer to allow us to seek external funding to leverage County funds. (The State of California has funding for health equity work but almost no other places do.)



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RACIAL EQUITY AND SOCIAL JUSTICE

- Goal 1** Foster a County organizational culture that supports the commitment to achieving racial equity
- Objective 2** Invest in an ongoing and continually developing racial equity learning program, including understanding the distinction between institutional, structural, interpersonal and individual racism, for County leadership and staff by end of 2021.
- Objective 4** Develop a shared understanding of key racial equity concepts across the County and its leadership
- Lead(s)** Alegría De La Cruz, Victoria Willard
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IMPLEMENTATION IDEAS AND PROJECTS

1. Develop a countywide RFQ to create a list of racial equity training consultants.
 2. Select a consultant to develop and deliver a coordinated County of Sonoma Race Equity Learning Program
 3. Create Core Team Affinity Groups (October – November 2021)
 4. Deliver Phase 1 of Racial Equity Learning Program (Race Equity 101) to Core Team (November - December 2021)
 5. Implement a train-the-trainer model for County-wide delivery of the Racial Equity Learning Program (January 2022)
 6. Deliver Racial Equity Learning Program to Department Heads and Supervisors (February/March 2022)
 7. Deliver Phase 2 of Racial Equity Learning Program (Equity + Result Based Accountability (RBA) to Core Team (Spring/Summer 2022)
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8. Develop a video version of the Racial Equity Learning Program to be available on Human Resources' Learning Management System (LMS) (Summer/Fall 2022) to current County employees and to be included in all new employee orientation (NEO).
9. Provide ongoing support at a departmental level for ongoing Employee Resource Groups (ERG) focusing on Racial Equity & Social Justice.

METRICS

- Number of Core Team members fully trained (Phase 1 +2)
- Number of Department Heads and Supervisors fully trained (Phase 1 only)
- Number of active ERGs focusing on Racial Equity & Social Justice
- Number of employees who have accessed and received the Racial Equity Learning Program through LMS (Phase 1 only)
- Assessment of the effectiveness of the training program

COORDINATION & PARTNERSHIP

The following pillars and their goals and objectives are connected to and have outcomes that are contingent upon having leadership and staff fully trained on principles and key concepts of race, racism, and equity.

The Learning Program was designed to be responsive to Sonoma County's history, current reality, and organizational needs. We will use the Strategic Plan as the guiding document to ensure that our consultants' training content is directed to meeting the following goals and objectives.

Organizational Excellence

Goal 1: Strengthen operational effectiveness, fiscal reliability, and accountability

- *Objective 5:* Align procurement and grant guidelines with strategic priorities and racial equity principles.
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Goal 3: Become an employer of choice with a diverse workforce that reflects our community, and an employer with a positive work culture that builds engaged and developed employees.

- *Objective 1:* Implement programs and identify opportunities to support employee work-life balance and a positive work environment, including a Telework Policy.
- *Objective 3:* Support employee professional growth and retention by investing in high quality training, development, and leadership programs.

Healthy & Safe Communities

Goal 1: Expand integrated system of care to address gaps in services to the County's most vulnerable.

- *Objective 2:* Identify gaps in the Safety Net system of services and identify areas where departments can address those gaps directly, and seek guidance from the Board when additional resources and/or policy direction is needed.

Goal 2: Establish equitable and data-driven distribution of services

- *Objective 1:* Safety Net departments will begin tracking data using results-based accountability (RBA) for key programs to establish common outcome measures, such as increased service access and utilization by communities of color, or decreased homelessness and poverty rates across the County.
- *Objective 3:* Identify and eliminate data gaps for underrepresented groups, and collaborate with the community to implement measures to mitigate the negative impacts caused by the lack of access to services by racial and ethnic groups that are disproportionately under-served by 2026.

The Office of Equity will form community partnerships to support leadership and staff to activate their learning and to deepen those connections in their daily work.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

N/A

FUNDING



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The Equity Learning Program is funded with General Fund dollars through FY 22-23. The only unfunded project in that time frame is the production of the LMS video to be available to the County workforce and new hires. The estimated costs of that video are unknown at this time, but are unlikely to exceed \$30,000.

The expenditures to develop and deliver a two-Phase Racial Equity Learning Program for one cohort (Core Team staff) are one-time; however, departments have identified and requested ongoing support in the form of updates to training, facilitation, mediation, and strategic planning for ERG related to Race Equity & Social Justice.

Consistency in content, focus, and core values in a trainer/consultant is critical, and the Office of Equity is working to centralize and coordinate training efforts across departments. However, the Office of Equity staff are not trainers, and in order to support our forward motion, we need to continue to have the support of consultants and trainers who bring a regional, state-wide, and national perspective to our work in Sonoma County. These ongoing Professional Service Agreements will need continued support. Thus, there is a need for funding throughout the entirety of the Strategic Plan, which goes beyond FY 22-23 and through FY 25-26.



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RACIAL EQUITY AND SOCIAL JUSTICE

Goal 1	Foster a County organizational culture that supports the commitment to achieving racial equity
Objective 3	Conduct baseline assessment by mid-2022 of racial equity awareness and understanding among County staff and develop a process to assess progress annually
Lead(s)	Alegría De La Cruz

IMPLEMENTATION IDEAS AND PROJECTS

Assessments can take the form of staff and leadership surveys or data/demographic analyses. The Office of Equity recommends a staff and leadership survey assessment and a slightly different baseline assessment than identified in this Objective. The Office of Equity recommends assessing people's *experiences with* (not their knowledge of) race equity at the County of Sonoma. This assessment will pave a path for a clearer understanding of what is needed to support those best practices and to heal from negative experiences with either race equity trainings and/or conversations.

The training consultant will assess the efficacy of the Core Team's Racial Equity Learning Program, but they will not provide a countywide assessment regarding all staff's understanding and awareness of racial equity.

There are also other baselines to be investigated and established in the Organizational Excellence pillar, including tracking progress of recruitment, hiring, retention, and promotion of BIPOC employees and managers.

The steps to determine the different baselines and assess progress include the following:

1. Consult with Core Team members and other departments to understand departmental-level baseline opportunities
 2. Investigate assessment services and options, including pricing and scope
 3. Select assessment service
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METRICS

Awareness and understanding of racial equity concepts can be reflected in many ways.

- The number of people who respond to a survey assessment tool
- The number of departments who engage in data/demographic analysis so as to create department baseline(s)
- The number of departments committed to tracking progress on racial equity goals
- The creation of new data sources
- Regularity in reporting and assessment

COORDINATION & PARTNERSHIP

Organizational Excellence

Goal 2: Increase information sharing and transparency and improve County and community engagement

- *Objective 2:* Implement countywide strategies to recruit, hire, develop, promote and retain County employees of color, produce an annual report card assessing progress, and update strategies as needed.

We are working to set up a monthly check-in with HR to develop a demographic baseline and to track progress.

Goal 3: Become an employer of choice with a diverse workforce that reflects our community, and an employer with a positive work culture that builds engaged and developed employees.

- *Objective 2:* Conduct an employee engagement survey by mid-2022, and based on survey data, develop and implement strategies to incorporate survey outcomes into future operational planning.
- *Objective 3:* Support employee professional growth and retention by investing in high quality training, development, and leadership programs.

These goals also refer to employee survey and assessment tools to support the development of strategies and programs to support engagement in countywide training and professional development efforts.



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COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

This Goal focuses on internal County culture, and its success will be seen and felt in the way the County and its staff engages with underserved and underrepresented constituents.

FUNDING

A countywide assessment tool or service is not currently funded, and is likely not a one-time expenditure. The “evergreen” or living nature of the assessment tool acknowledges the ways in which an assessment would need to grow and change to meet the changing status of the work.

Currently, the Office of Equity is supported through the General Fund, and we have no capacity to seek external funding at this time.

We have Core Team members from the HR department and support from training consultants to begin the creation of the baseline(s). With the ARPA data analyst, we will have some limited-term support to begin gathering and analyzing existing internal and external County data. Over the long term, we are currently without staff support to fully implement this plan.



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RACIAL EQUITY AND SOCIAL JUSTICE

- Goal 2** Implement strategies to make the County workforce reflect County demographics across all levels
- Objective 1** Identify opportunities to enhance recruitment, hiring, employee development, and promotional processes to reflect the value of having the perspectives of people of color represented at all levels in the County workforce
- Objective 2** Implement countywide strategies to recruit, hire, develop, promote and retain County employees of color, produce an annual report card assessing progress, and update strategies as needed.
- Lead(s)** Spencer Keyword, Alegría De La Cruz
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IMPLEMENTATION IDEAS AND PROJECTS

In order to enhance recruitment, hiring, employee development, and promotional processes to reflect the value of having the perspectives of people of color represented at all levels in the County workforce, HR, in conjunction with the Office of Equity, is focusing on the following areas:

- Increasing advertising and outreach to industry and job-related sources that focus on reaching a qualified and diverse applicant pool; increasing participation in community-based events.
 - Evaluating the Civil Service Rules, class specifications, and recruitment examination processes to determine if rules, job class minimum qualifications, and processes can be changed to remove barriers that may be adversely impacting applicants and candidates in underrepresented demographic groups.
 - Developing tools and processes for departments to identify and mitigate implicit and explicit biases that exist during the department selection process.
 - Increasing training for the workforce in the areas of professional development and equity, diversity, inclusion, and belonging.
-



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- Revitalizing the County's internship program to work with both departments and local educational institutions to create internship opportunities for students.
- Developing tools for HR and departments to track progress towards meeting the Strategic Plan goal.

To date, the following initiatives have been identified and/or launched to help the County meet its target of having a workforce that is reflective of the community:

- The creation of a Hiring + Diversity Best Practices Toolkit for County HR professionals and hiring managers. The toolkit, released in April 2021, is a comprehensive resource focused on increasing diversity outreach and providing HR and departments with the tools and resources to mitigate bias and remove potential barriers during the recruitment and department selection processes. All departments are expected to adhere to these new practices. In conjunction with the rollout, HR conducted eight trainings for department HR Liaisons and Hiring Managers regarding the processes and practices the toolkit covers. A recording of one training has been made available on Sonoma Higher Ed (the learning management system).
- The redaction of Personally Identifiable Applicant Data during recruitment examination processes – In May 2021, HR began removing personally identifiable data from applications to reduce rater bias during the Application Appraisal examination process.
- The implementation of new processes to increase advertising at job boards and websites focused on reaching a qualified and diverse applicant pool – In April 2021, HR began evaluating employee demographic data in comparison to the demographics of the available workforce of Sonoma County as part of the recruitment planning process. The demographic information is utilized to develop more comprehensive advertising plans to reach qualified and diverse applicant pools. Additionally, HR executed a recruitment advertising contract with DiversityJobs.com and is purchasing ads with WorkplaceDiversity.com, both of which expand our outreach across the numerous diversity focused job boards within their respective networks.
- In conjunction with the Hiring + Diversity Toolkit, more emphasis has been placed on departments conducting promotional recruitments for advanced, lead, supervisory, and managerial level positions when there is a viable internal candidate pool. When evaluating diversity data, the County's workforce is the most diverse at the lower levels of the organization. Utilizing more promotional recruitments is one methodology that could help the County achieve greater diversity throughout the workforce.



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- In conjunction with the Hiring + Diversity Toolkit, HR created a Competency-Based Interview Guide that departments can utilize when developing their department selection interviews. The guide contains approximately 200 interview questions organized by 23 key competencies. As part of the Toolkit, HR has also stated that departments should prioritize asking at least one diversity/equity related interview question during the department selection interview process for supervisory, leadership, or other positions of influence, or those which have responsibility for providing services to a diverse client base. The guide contains a list of diversity/equity questions from which they can choose.
- In conjunction with the Hiring + Diversity Toolkit, HR created a Bias Awareness Guide for interview panelists. The guide contains important information about understanding biases, the differences between implicit/unconscious and explicit biases, how biases can impact the interview process, examples of biases, and tools for overcoming them. Departments have been instructed to provide all interview panelists a copy of the guide, and affirm that the panelists have read it, in advance of their participation on a selection interview panel.
- The Office of Equity is working on developing and delivering a Sonoma County Race Equity Learning Program in 2022, as outlined in RESJ 1-2. There are also over sixteen equity, diversity, inclusion, and belonging trainings currently available online to employees through the County's Learning Management System. HR is currently evaluating additional vendor-available courses to add to the system. HR also offers a suite of trainings to employees at all levels of the organization to support their professional development, as well as the Sonoma County HIGHER executive training program for executive- and near-executive level employees. (HR will coordinate with Office of Equity the overall training offerings related to DEI.)
- HR is currently working on revising its supervisor/management level training, "Recruit. Select. Hire." to incorporate the new processes and practices put into place in the Hiring + Diversity Toolkit. It is expected the revised course will be launched by end of February 2022.
- Starting in January 2021, HR began providing departments with employee demographic reports bi-annually, in January and July of each year. The reports provide data regarding the age, gender, and race/ethnicity of a department's overall workforce by job level – individual contributor, supervisor, manager, and executive. The report provides departments with an awareness of how their workforce compares to the available labor force of the County population both as a whole and throughout its ranks and will be used as the basis for tracking progress over time.



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- Since April 2018, HR has been offering a public facing training, “Start Here”, multiple times a year. The purpose of the training is to educate the public on the County’s recruitment and hiring process. Pre-COVID, the training was conducted at various locations throughout the County (including Sonoma Valley Library, SRJC Petaluma Campus, Roseland Library, SSU, County Center, and JobLink) to reach individuals across our community. Since COVID, the training has been conducted on-line via Zoom. The class is currently only being offered in English. HR is working on providing a Spanish language version of the training and increasing the number of areas in which the in-person training is provided, post-COVID. To date, over 430 individuals have taken the training.
- The creation of a public facing Employee Demographic Dashboard. An Employee Demographic Dashboard is public facing tool that provides point-in-time data of the make-up of the workforce, by race/ethnicity, gender, and age, organized and displayed for the organization as a whole and by individual departments (as an example). The dashboard would provide the County with a baseline for measuring equity, diversity, and inclusion efforts related to recruitment, hiring, and retention, and, over time, could be used to highlight trends in the evolution of the workforce. By having the information accessible to County employees, community partners and the public, it makes the County’s efforts to advance racial equity work more transparent and easier to track, thereby providing a way to hold the County accountable in this work.
 - This project is not currently budgeted. \$50,000 in a ARPA funding request was submitted, and HR will also apply for funding through the monies set aside for Strategic Plan initiatives. *The Employee Demographic Dashboard is one mechanism that could also be used to meet the objective of RESJ 2-2, which includes the production of an annual report card assessing progress in the County’s efforts to have a workforce reflective of the community.*

Timeline

- Work on expanding advertising at job boards and websites focused on reaching a qualified and diverse applicant pool, developing marketing materials in Spanish, and attending virtual career fairs is already in progress and will be ongoing. HR will resume attending in-person job fairs and community events as they begin resuming, post-COVID.
- The evaluation of the Civil Service Rules, job class minimum qualifications, and examination processes to determine what impacts exist will begin in earnest in calendar year 2022. HR will need to work with the



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labor organizations and Civil Service Commission to make any necessary changes. A project timeline will be developed by March 1, 2022.

- The Office of Equity is working on developing and delivering a Sonoma County Race Equity Learning Program in 2022, as outlined in RESJ 1-2. HR is also reviewing vendor-available courses related to equity, diversity, inclusion, and belonging that can be made available to employees through the Learning Management System. These courses will be made accessible through the system as they are identified.
- Work on the internship program will begin in 2022.
- If ARPA funding is approved for the dashboard, work will begin in early 2022. Phase one of the dashboard will be online by the end of the calendar year with successive phases to be completed by the end of 2024. If ARPA funding is not approved, work on the dashboard will be delayed until the project is funded.

METRICS

When comparing the diversity of the County's workforce to the community, there needs to be agreement on what data is being compared. HR is comparing the County's workforce with Sonoma County's available workforce, which is identified as individuals between 18-64 years of age.

There are two types of data that should be utilized to evaluate the success of these efforts: 1) Applicant Data, and 2) Employee Data.

Using the County's Applicant Tracking System, HR is able to track and evaluate the "applicant flow" of each recruitment. Applicant flow depicts the progression of candidates through the examination and selection processes, organized by each demographic group (gender, race/ethnicity, and age).

- As outward facing efforts increase (i.e., more diversity-focused recruitment advertising, greater attendance at community events, the expansion of Start Here training throughout the community, deployment of Spanish language recruitment materials, revitalized internship program, etc.), HR hopes to achieve greater diversity in the County's applicant pool.
 - As internal facing efforts increase (changes to the Civil Service Rules and recruitment processes, job class minimum qualification updates, additional tools and training for departments to improve selection processes and reduce and eliminate bias, more internship opportunities, etc.), HR hopes to see a greater number of
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diverse candidates being successful during the recruitment process and referred to departments for consideration.

Using the County's Human Resources Information System, HR is able to track and evaluate the demographics of the County's current workforce. Starting in January 2021, HR began providing departments with employee demographic reports bi-annually, in January and July of each year. As stated previously, these reports provide data regarding the age, gender, and race/ethnicity of a department's workforce. The data is then broken down further, by job level – individual contributor, supervisor, manager, and executive. This information provides departments with an awareness of how their workforce compares to the available labor force of the County and the diversity makeup of their workforce throughout its ranks. As turnover occurs over time, HR will have the ability to determine if the workforce, across all levels of the organization, is becoming more reflective of the community that is being served.

Another way that HR would like to evaluate and report out on the diversity of the County's workforce is through the use of an Employee Demographic Dashboard. As stated above, an Employee Demographic Dashboard is a public-facing tool that provides point-in-time data of the make-up of the workforce, by race/ethnicity, gender, and age organized and displayed for the organization as a whole and by individual department (as an example). At this time, HR anticipates the dashboard would be updated annually or bi-annually and serve as a mechanism for the County to transparently assess progress towards meeting its goals.

COORDINATION & PARTNERSHIP

This strategic plan goal has a direct nexus with the Organizational Excellence Pillar, Goal 3, Objectives 1-3:

Organizational Excellence

Goal 3: Become an employer of choice with a diverse workforce that reflects our community, and an employer with a positive work culture that builds engaged and developed employees.

- **Objective 1:** Implement programs and identify opportunities to support employee work-life balance and a positive work environment, including a Telework Policy.
 - **Objective 2:** Conduct an employee engagement survey by mid-2022, and based on survey data, develop and implement strategies to incorporate survey outcomes into future operational planning.
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- **Objective 3:** Support employee professional growth and retention by investing in high quality training, development, and leadership programs.

As HR is the primary and/or co-leads for these objectives, work on both pillars will be completed in tandem by department staff.

HR has received feedback from other agencies that they are interested in utilizing the County's Learning Management System to provide online trainings for their workforces. HR will be in discussion with those organizations to determine the feasibility of their requests and determine what benefits or efficiencies these types of partnerships could achieve. Additional funding may be requested based on the outcome of this analysis.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

Community engagement will primarily occur through HR's outward facing efforts. These include participation in job fairs and community events and working with educational institutions on the internship program. Additionally, HR will continue to expand access to Start Here training throughout the County post-COVID, and create and distribute recruitment-focused marketing materials in both English and Spanish.

If approved, the Employee Demographic Dashboard would make employee demographic information easily accessible to County employees, community partners and the public, thereby making the County's efforts to advance racial equity work more transparent, easier to track, and provide a way to hold the County accountable in this work.

FUNDING

At this time, the only funding being requested for a year 1 project is for the Employee Demographic Dashboard. A request for 50,000 in ARPA funding was submitted, and HR will apply for funding through the monies set aside for Strategic Plan initiatives.

Additional funding may be requested in future years as project plans are developed and additional strategies are identified.



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RACIAL EQUITY AND SOCIAL JUSTICE

- Goal 3** Ensure racial equity throughout all County policy decisions and service delivery
- Objective 1** Establish a racial equity analysis tool by 2022 for departments to use for internal decision-making, policy decisions and implementation, and service delivery
- Lead(s)** Alegría De La Cruz
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IMPLEMENTATION IDEAS AND PROJECTS

The Government Alliance on Race and Equity, or GARE, states that a racial equity tool shall:

- identify clear goals, objectives and measurable outcomes;
- engage community in decision-making processes;
- identify who will benefit or be burdened by a given decision, examine potential unintended consequences of a decision, and develop strategies to advance racial equity and mitigate unintended negative consequences; and
- develop mechanisms for successful implementation and evaluation of impact.

The Office of Equity has recommended the use of a basic race equity tool that asks the following questions when analyzing policy:

1. Proposal: What is the policy, program, practice or budget decision under consideration? What are the desired results and outcomes?
 2. Data: What's the data? What does the data tell us?
 3. Community engagement: How have communities been engaged? Are there opportunities to expand engagement?
 4. Analysis and strategies: Who will benefit from or be burdened by your proposal? What are your strategies for advancing racial equity or mitigating unintended consequences?
 5. Implementation: What is your plan for implementation?
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6. Accountability and communication: How will you ensure accountability, communicate, and evaluate results?

Customization can take place if needed to ensure that it is most relevant to our local conditions, but

GARE cautions that there is a risk that there will be a significant investment of time, and potentially money, in a lengthy process of customization without experience. It is through the implementation and the experience of learning that leaders and staff will gain experience with use of a tool.

The Office of Equity has reviewed significant Board items proposed for 2021 and has recommended a race equity analysis on specific items. However, it has not always been the case that departments have conducted the analysis, reached out during the course of their analysis, or included the results of the analysis in their Board items.

Proposed implementation steps, to be discussed with CAO and COB staff, include:

1. Ensuring each CAO departmental analyst has received the Race Equity 101 training when it is available. (OoE)
2. Requiring the use of the race equity tool in each significant Board item. (CAO)
3. Involving Office of Equity support, if needed, in conducting the analysis. (CAO)
4. Monitoring the completion of the analysis. (CAO)
5. Ensuring the Office of Equity has engaged in a review. (CAO/OoE)
6. Including the analysis in the Board item summary. (CAO)

Preparing our Board to ask the simple racial equity tool questions, such as “How does this decision help or hinder racial equity?” or “Who benefits from or is burdened by this decision?” on a routine basis to put theory into action. (CAO/OoE)

METRICS

- How many departments have used the tool?
 - How many Board items have been presented publicly since November 2020 that include a race equity analysis?
 - Assess facility/usability of the tool, develop process to partner with CAO or department analysts to address challenges that departments experience.
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COORDINATION & PARTNERSHIP

Healthy and Safe Communities

Goal 1: Expand integrated system of care to address gaps in services to the County's most vulnerable

- *Objective 2:* Identify gaps in the Safety Net system of services and identify areas where departments can address those gaps directly, and seek guidance from the Board when additional resources and/or policy direction is needed.

Goal 2: Establish equitable and data-driven distribution of services

- *Objective 1:* Safety Net departments will begin tracking data using results-based accountability (RBA) for key programs to establish common outcome measures, such as increased service access and utilization by communities of color, or decreased homelessness and poverty rates across the County.
- *Objective 2:* Develop and implement dashboard tracking tools to collect data on common outcomes measures across Safety net departments by 2026.
- *Objective 3:* Identify and eliminate data gaps for underrepresented groups, and collaborate with the community to implement measures to mitigate the negative impacts caused by the lack of access to services by racial and ethnic groups that are disproportionately under-served by 2026.

The Equity Core Team currently includes the Upstream Investment team. The recent partnership between the Office of Equity and HSD to ensure equitable allocation of ARPA resources also supports the deepening the connections between the two departments. By using a race equity tool, applying anti-racist principles, and Results Based Accountability, this partnership provides an opportunity for a full and powerful application of a race equity tool in decision-making and measurement of effectiveness and reach of investments into disproportionately impacted communities of color.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

By engaging anti-racist principles in data-driven decision making, we are embedding equity into the day to day work of the County of Sonoma.



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The creation of the ARPA Equity Work Group will also ensure community engagement in the process of equitable distribution of ARPA funds to community based organizations to serve disproportionately impacted communities of color.

FUNDING

This effort is fully funded.



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RACIAL EQUITY AND SOCIAL JUSTICE

- Goal 3** Ensure racial equity throughout all County policy decisions and service delivery
- Objective 2** Establish regular and publicly available reports on racial equity in County policies, programs and services
- Lead(s)** Alegría De La Cruz

IMPLEMENTATION IDEAS AND PROJECTS

In November, 2020, the Office of Equity supported the Board of Supervisors in adopting a template for actions prior to new or substantial revisions to policy, including consideration of equity impacts. The Racial Equity Toolkit offers six sets of questions that, when applied to early policy development, can assist to ensure that individual decisions are aligned with race equity goals and outcomes. They are the following:

1. **Proposal:** What is the policy, program, practice or budget decision under consideration? What are the desired results and outcomes?
 2. **Data:** What's the data? What does the data tell us?
 3. **Community engagement:** How have communities been engaged? Are there opportunities to expand engagement?
 4. **Analysis and strategies:** Who will benefit from or be burdened by your proposal? What are your strategies for advancing racial equity or mitigating unintended consequences?
 5. **Implementation:** What is your plan for implementation?
 6. **Accountability and communication:** How will you ensure accountability, communicate, and evaluate results?
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The adopted changes to the Board Rules of Procedures require departments to consult with the Office of Equity to review the analysis conducted and to ensure alignment with the Race Equity & Social Justice pillar's goals and objectives and with overarching County equity goals.

Since the adoption of the Board Rules of Procedures, the Office of Equity has had a limited number of consultations with departments adopting new or significant revisions to policy, including Department of Transportation and Public Works on the polystyrene ban, the Cannabis Equity Assessment, and the proposed Land Acknowledgment.

Additionally, at the outset of 2021, the Office of Equity, working together with the County Administrator's Office (CAO) identified a number of significant Board items that would benefit from including an equity analysis. With the combination of the Board's updated Rules of Procedure with the Racial Equity Toolkit and the identification of the Board items with possible equity impacts, the County has the tools in place to support departments to undertake and present its equity analysis in each Board item. With the publication of the updated Portrait of Sonoma in November, 2021, as well as the data developed and utilized during the allocation of the American Rescue Plan Act funds, the County will have relevant and easily accessible data for departments to utilize as they undertake the requisite equity analyses.

The Office of Equity is also working to develop the equity skillset in the County's Core Team, and by Spring, 2022, each department will have embedded staff to support the development of equity analyses. In addition, the Office of Equity will work to train each CAO analyst to ensure that relevant Board items contain an equity analysis in the Summary Report. Finally, as the Office of Equity moves to train Department Heads and County Supervisors, by the Fall of 2022, County leadership and key staff will have gone through the Race Equity Learning Program. At that point, the County will have sufficient capacity to track the number of new policies and significant revisions that have gone through an equity analysis and decision-making process, as well as to create accountability mechanisms for each department and the County as a whole.

METRICS

- The County Administrator's Significant Board Items list, developed in Q1 of CY '22, will provide the overarching view of Board actions with equity impacts.
 - The Office of Equity, working with the County Administrator's Office, developed a set of equity performance measures for use during Department Head performance evaluations. As each Department Head is now
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required to include a summary of their equity efforts in furtherance of the County's equity goals, the Board of Supervisors has the ability to create additional accountability mechanisms for key leaders in County government.

- The County's allocation of American Rescue Plan Act (ARPA) funds also provides a key opportunity to create a new accountability mechanism and reporting process around equity investments to address the impacts felt by disproportionately impacted communities and community members. Accountability metrics will be developed in partnership with the ARPA Equity Community Work Group, and will be tracked through the Human Services Department's Upstream Investments and additional equity considerations and data points in the County's Results Based Accountability process. This will likely be the first opportunity to undertake an equity evaluation of funding and investments, beginning in Spring of 2022 and continuing through FY '25-26.

COORDINATION & PARTNERSHIP

Currently, the Office of Equity, the Department of Health Services, the Human Services Department, and the Economic Development Board are working closely to develop an equity-based allocation process for ARPA funds. This partnership includes cross-training, data collection, accountability metrics development, and, ultimately, allocation and evaluation of funding impacts.

The ARPA allocation process also includes the creation and development of the ARPA Community Equity Work Group, which intentionally focused on representation of Black, Indigenous, and People of Color in its membership, to ensure that there was connectivity to the lived and professional experiences of community members most impacted by the COVID-19 pandemic. These 15 individuals representing all 5 Supervisorial Districts will also be central in the effort to build and nourish effective community partnerships rooted in racial equity to ensure broad access to ARPA funds.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

Working with the ARPA Community Equity Work Group, as well as in Upstream Investments' public data dashboard, the public will have access to the metrics and performance metrics of community-based organizational partners using these funds. Currently the Upstream Investments Portfolio only allows someone to search using the



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criteria of service area and age demographic, and the work that the Office of Equity is undertaking with Upstream Investments will result in additional criteria (e.g. racial and ethnic demographics) being added to the Portfolio's search capabilities.

While the ARPA allocation process marks the end of this iteration of the Work Group, one of the other areas of work currently on the Office of Equity's Work Plan is to develop the County's Community Engagement Plan. That Plan will elevate best practices from the Work Group as well as from the Equity (formerly Latinx) Health Work Group to inform its recommendations

FUNDING

We will need funding to support our work with consultants Equity & Results who are assisting the Office of Equity, Upstream Investments, and Economic Development Board's work with the ARPA Community Equity Work Group with the creation of a Results Based Accountability + equity approach to ARPA funding allocations (\$40,000).

We will also need funding to support the development of a Community Engagement Plan, which will assist to identify the best practices in sharing equity reports and data with the larger community. The Office of Equity has submitted an ARPA proposal to support the development of that Plan, including payments of stipends to community members and community based organizations to participate in the development of the Plan. (\$150,000 for stipends and contracts with community-based organizations, and \$200,000 for consultant services).

There are likely additional costs to train and support our community-based organizations to deepen their capacity to collect and report new data points. Costs: unknown and ongoing.



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RACIAL EQUITY AND SOCIAL JUSTICE

Goal 4 Engage community members and stakeholder groups to develop priorities and to advance racial equity

Objective 1 Establish a process for engagement and collaboration with community members and stakeholder groups, and launch a community engagement strategy by the end of 2022 with a focus on racial equity

Objective 2 Collaborate with community members and stakeholder groups to develop racial equity strategies for County emergency response, economic recovery and resiliency planning efforts

Objective 3 Begin implementing strategies for regular community engagement to guide racial equity efforts

Note: The three objectives for Goal 4 of are under a single implementation plan because they all involve establishing and formalizing foundational elements of community engagement. The process and building blocks will be similar among the objectives.

Lead(s) Alegría De La Cruz, Paul Gullixson, Christel Querijero

IMPLEMENTATION IDEAS AND PROJECTS

- Identify community members and stakeholder groups and/or build on ARPA work group's community partnerships
 - Establish a County community engagement work group by March 2022
 - Document lessons learned from fires and other projects
 - Outline a process for engagement, starting with emergency response, by May 2022
 - Potentially use ARPA time-limited position to look at County community engagement efforts
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- Identify and retain Consultant to work with the County Communications Team and the ARPA time-limited position to look at existing community engagement efforts, reviewing models for County community engagement and partnerships, and aiding in the development of a robust community engagement strategy for the County.
- Hire consultant in early 2022 with initial analysis, research, and community feedback gathering work projected to begin in mid-2022. The project would be required to be completed and live to the public by the end of 2022, culminating with a cost and legal analysis presented to the Board of Supervisors for future steps or investments.

METRICS

- Board-approved Community Engagement principles established (could be part of the framework).
- Community Engagement Framework including strategies, models and processes for inclusive engagement finalized and approved by Board(?).
- Community Engagement Framework Implementation Plan developed. (website?)
- Annual Community Engagement Plan to align with Significant Items developed (what does the year of community engagement efforts look like?)
- Gather existing data such as Portrait of Sonoma, community assessments, and other data to identify starting and goal indicators/measures.
- Data crucial to this work includes access to information, media availability to communities, engagement of members in the diverse communities, especially hardest-hit communities.
- Enlist community-based organizations to assist in gathering data where gaps exist.

COORDINATION & PARTNERSHIP

- This goal and related objectives intersect primarily with objectives under the Organizational Excellence pillar, and objective leads in common from HR and CAO. Additionally, this objective intersects with the Healthy and Safe Communities pillar, objective 5.5 and the objective leads in common from CAO.
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- Partnerships can be formed with local jurisdictions and community-based partners to leverage their contact with the public, especially in target communities. For example, the City of Santa Rosa has the Community Engagement initiatives, as do other jurisdictions. Many community-based partners focus their work in diverse geographic areas of the County, facilitating our need to reach all residents.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

- This goal and related objectives are focused on community and equity. The public will be engaged both virtually and in person through staff and community-based organizations.
- The success and effectiveness of the engagement approach and plans will be measured by subsequent community assessment surveys and by other methods including the Portrait of Sonoma, Los Cien Scorecard, etc.
- An equity lens will be applied in the development and implementation of the goals by centering community throughout the process and by including community-based organizations at all steps. Centering the community is essential at crucial steps of the process and the inclusion of community voices in the decision-making process.
- Vitally important is to geographically identify partners in all areas so that the engagement and information is disseminated in the broadest manner possible.
- Where possible, we will ensure that climate impacts are considered in meetings and information sharing, including holding virtual meetings, limiting printing of collateral, and offering other ways of providing useful information.

FUNDING

Estimated Project Costs



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Salaries and Benefits (Extra help or time limited* only)	\$0
Services and Supplies	\$150,000
Capital Costs	\$0
Other Consultant/Contract	\$250,000
Estimated Total Project Costs	\$400,000
Anticipated Alternate/ Leveraged Funding Sources	
List here; provide a detailed description in the narrative below	\$0
Total Funding Request	\$400,000

*Note: Funding request from ARPA request to establish community engagement initiative.

Costs include hiring a consultant, with additional costs for stipends for community engagement and focus groups, as well as interpretation and translation costs.

We would work to include all communities who experience marginalization in county communication and engagement. Stipends are a regularly used tool by CBOs to value the work of community members.

ARPA eligibility elements include:

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- Leveraging community wisdom and solutions and creating an infrastructure for community voices inside of County decisions and implementation of programs supports the following ARPA elements:
 - Support urgent COVID-19 response efforts to continue to decrease spread of the virus and bring the pandemic under control, including support for vulnerable populations to access medical or public health services, enhancement of public communication efforts, and support for prevention efforts
 - Address negative economic impacts caused by the public health emergency, including delivering assistance to workers and families
 - Rebuilding public sector capacity, including investing in targeted outreach and impact evaluations
 - Serving the hardest-hit communities and families, including addressing health disparities and the social determinants of health, through funding for community health workers, and public benefits navigators
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RACIAL EQUITY AND SOCIAL JUSTICE

- Goal 4** Engage community members and stakeholder groups to develop priorities and to advance racial equity
- Objective 4** Develop and establish a language access policy for the County
- Lead(s)** Alegría De La Cruz

IMPLEMENTATION IDEAS AND PROJECTS

This project was identified as a priority early in the creation of the Office of Equity, with a proposed timeline of completion by end of 2021. However, the Office currently lacks capacity to address this critical need. A significant amount of research, a countywide department survey, and initial fiscal analysis have all been completed to date and will facilitate this work being done more quickly. If funded through ARPA funds, a consultant could be hired in early 2022 with the analysis and policy options presented to the Board by 2023. If not funded through ARPA funds, this work will be move at a slower pace.

Language Access Policy Plan:

- Gather data and information about the County's non-dominant language speakers;
 - Evaluate the County's existing language access provision;
 - Assess additional departmental and agency needs;
 - Evaluate impacts on bilingual staff;
 - Engage non-dominant language speakers about their communication and language access needs;
 - Develop a report of the infrastructure and capacity needed to successfully implement a County-wide Language Access Policy;
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- Present a policy workshop to the Board of Supervisors with options;

Develop and deliver trainings to community members and community-based organizations about the new Policy, once adopted.

METRICS

- Amount of funds spent on outside translation and interpretation services;
- Number of non-dominant language speakers served in their languages;
- Number of trainings delivered to community members and community based organizations about the new Policy.

COORDINATION & PARTNERSHIP

The Office of Equity is the implementation lead on the related objectives. While the Office of Equity currently enjoys vibrant community partnerships with the Spanish-speaking and indigenous language-speaking populations and the community organizations that serve those populations, there are other non-dominant language speakers in our community with whom we have not engaged in meaningful ways. This project facilitates deeper knowledge and cements a foundation for ongoing dialogue.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

A language access plan will ensure clarity and consistency in County communications and service delivery. It will also ensure that the County is effectively serving and is in dialogue with all of its residents. In past events, non-English speakers have been left behind.

Community engagement efforts will be geographically dispersed throughout each supervisorial district. We would work to include all communities who experience marginalization in county communication and service delivery. Stipends are a regularly used tool by CBOs to value the work of community members.



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Supporting the creation of a language access plan will increase equitable access for families and communities trying to recover from the economic and health impacts of this Pandemic.

FUNDING

The Office of Equity has applied for funding through an ARPA application.

There are no other funding sources available to address this need currently, and the Office of Equity lacks the capacity to investigate other funding sources at this time.



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RESILIENT INFRASTRUCTURE

- Goal 1** Invest in County buildings and technology to enhance service delivery and improve employee mobility
- Objective 1** Design the new County Center to be carbon neutral and zero waste; and pursue carbon reduction and zero waste plans for remaining County facilities.
- Lead(s)** Caroline Judy

IMPLEMENTATION IDEAS AND PROJECTS

New County Government Center

Recognizing that the County's aging main campus facilities are running to fail, the Board of Supervisors directed staff to research program needs and investigate possible scenarios for replacing or moving administration facilities. In January 2021, the Board directed staff to explore downtown Santa Rosa sites in addition to continuing to evaluate the current Administration Center as the possible site for future buildings. In July 2021, the Board directed staff to initiate CEQA studies on the preferred location for new Administration buildings at the currently vacant Sears site in downtown Santa Rosa. The scope of work for the CEQA study will include an evaluation of environmental impacts.

Intrinsic to the goals and aims of the New County Government Center project is integrating "triple net-zero" strategies for waste, water and energy. These design goals will be clearly specified for interested Public Private Partnership (P3) respondents when the Request for Qualifications is issued. In the summer and fall of 2021 these design standards will be further refined in the solicitation documents. The iterative design process will also consider service delivery efficiency, cost efficiency and workplace excellence, and will inform a new standard to be adopted for future office renovations in county owned and leased facilities.



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In addition, the County Government Center project intends to facilitate and encourage use of existing mass transit systems, leveraging federal transportation funding sources. A transit-oriented design will encourage staff and visitors to utilize existing transit systems including SMART, Santa Rosa City Bus, Sonoma County Transit, and Golden Gate transit.

The new County Government Center buildings will fulfill the Board's sustainability goals and objectives to achieve net zero energy, waste and water. The 2022 Title 24 Energy and CalGreen Building Codes will be used as a baseline to achieve compliance with the mandatory building code requirements. Additional green building standards include US Green Building Council (USGBC) Leadership in Energy and Environmental Design (LEED) certification program or the International Living Future Institute (ILFI) Living Building Challenge Zero Carbon Certification, Zero Energy and Zero

Carbon standards. New Building Institute resources for Zero Net Energy building design will also be utilized, including resources developed for other ZNE projects in San Diego County and Triple Net Zero University of California projects. Projects may choose to achieve equivalency with one or more (or a combination) of these referenced standards. The New Buildings Institute Getting to Zero resources for municipalities will also assist in our development of policies for new construction projects.

All capital improvement projects within County government buildings (whether new construction or renovation) are permitted by Permit Sonoma and must be consistent with building code requirements including Title 24 described above among others, as described in the appendix to this plan.

Existing Buildings

In addition to the New County Government Center project, the Board has approved the County's participation in PG&E's Sustainable Solutions Turnkey (SST) program. In this program the County will obtain "investment grade" audits of the energy and water use in our existing buildings and will create an Energy Master Plan (EMP). A list of recommended projects to improve energy efficiency, provide battery storage, generate renewable energy, reduce water use, and increase resilience with a goal of achieving carbon neutrality in the existing buildings will be brought to the Board for consideration early in 2022. SST identified projects can be financed via on-bill financing or via annual capital budget financing.



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Sufficient investment in ongoing maintenance is essential for efficient building operation, particularly for HVAC and mechanical/electrical systems. General Services tracks the completion rate of preventative maintenance and monitors on a monthly basis as an indicator of facility “health.”

METRICS

Net Zero Energy: Energy saved, measured against baseline use.

Along with the key milestones normally tracked in capital programs, environmental benchmarks will be established by calculating the current carbon footprint resulting from operations. The County needs to complete a new green-house-gas (GHG) inventory for government operations. Once we have updated data we will be able to measure progress towards reduced emissions. It is critical to identify climate objectives in solicitation documents to guide design/build/operations. The County tracks electrical use by building and is able to use this baseline information to track progress towards net zero energy as electrical generation and storage is brought online. However, without an updated GHG inventory from existing operations there will not be sufficient data available to benchmark progress towards reduced emissions.

Net Zero Water: The amount of water saved from reduced water use in existing county facilities.

General Services tracks water use metered on either a campus or building by building basis via sub-meters. This data will assist in determining progress towards reduced water use.

Net Zero Waste: Tons of compost diverted from landfills; tons of recycling diverted from landfills.

Progress towards net zero waste will be evaluated by considering waste diversion. Composting can be measured by number of tons of waste diverted from the waste stream to composting. Currently accurate data is not available due to reduced building populations during the pandemic.

COORDINATION & PARTNERSHIP

This objective has direct impacts on several other objectives including:

- RI 1.2 Standards for Office improvements: The new CGC will establish standards that can be applied to existing offices;



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- RI 2.3 Design and build a new, resilient Emergency Operations Center (EOC): The new EOC will be part of the procurement for the new CGC;
- CAR 2.3 Design or retrofit County facilities to be carbon neutral, zero waste and incorporate resilient construction techniques and materials: design standards for the CGC will be carbon neutral;
- CAR 3.3 Carbon Eliminating Microgrid: As part of CGC' s Triple net-zero goal energy independence and self-generation concepts will be utilized.

The County Administrator and General Services will continue to coordinate with the City of Santa Rosa throughout the new County Government building process.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

Environmental studies, which include opportunities for public comment, in addition to a community engagement processes are planned for the new County Government Center project.

The new County Government Center project will support partnerships with cities and community stakeholders by ensuring fully accessible in-person facilities and remote access systems. Its proximity to other County services will support increased direct access by residents and build social capital through delivery of services.

Staff will work with leads in the Racial Justice and Social Equity Pillar to address the social equity considerations that could be part of the facility needs assessment and design

FUNDING

The County Government Center (CGC) project will be delivered through a Public-Private Partnership (P3) via a design-build-finance-operate-maintenance agreement. In this model, a developer/concessionaire leverages private financing for the project, for which the County makes annual payments for a specified term. The GCC financing plan is yet to be determined but the Deferred Maintenance fund is likely to be a significant part of the plan. The developer may have access to Federal funds including Transportation Infrastructure Finance and Innovation Act (TIFIA) or new infrastructure programs in development.

County Government Center Facility Planning

Function Area:
Administrative and Fiscal Services

Strategic Plan Impact:

Request: R150038

Department/Division:
General Services / Facilities Development and Management

Project Description



FIRE RESILIENCY and RECOVERY PROGRAM: The FY 13/14 Comprehensive County Facilities Plan determined that three quarters of the County's facilities on the main campus are beyond useful life. Space constraints on the County Government Center campus have prevented consolidation of administrative functions.

Solutions include evaluating and planning for construction of a new approximately 500,000 square/foot multi-story office building to house County Administrative services with new parking. Preliminary estimated costs for construction of a new County campus is \$500 million at the County Center.

Also included as part of the overall planning is a phased consideration for a new Emergency Operations Center, New Morgue, Public Health Lab, and new parking garage. See Planning projects R200027, R200026, and R210017.

Project Cost	
Acquisition:	0
Design/PM:	7,815
Construction:	954,170
Furniture/Reloc:	0
Other:	1,830
Project Total:	963,815
Current Phase:	INIT

Operation and Maintenance Cost	
Utilities:	1,175
Maintenance:	1,940
Other:	0
OM Total:	3,116
Replacement Value:	561,065
RI Cost:	216,702
RI:	0.36

Service Impact:

Asset replacement. Net savings of O&M costs if implemented.

Available Funding Sources	Prior FYs	Current FY	FY1 2022-23	FY2 2023-24	FY3 2024-25	FY4 2025-26	FY5 2026-27	5YR Total	Future YRs	Project Total
General Fund	5,897	2,197	0	0	0	0	0	0	0	8,094
Unfunded	0	0	191,144	191,144	191,144	191,144	191,144	955,721	0	955,721
TOTALS:	5,897	2,197	191,144	191,144	191,144	191,144	191,144	955,721	0	963,815



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RESILIENT INFRASTRUCTURE

- Goal 1** Invest in County buildings and technology to enhance service delivery and improve employee mobility
- Objective 2** Adopt design standards for County office improvement projects to maximize opportunities for telework and incorporate revised workstation space standards.
- Lead(s)** Keith Lew, Janie Carduff
-

IMPLEMENTATION IDEAS AND PROJECTS

Development of new space utilization standards to encompass all twenty-six departments will be accomplished through the development of the new County Government Center. The new CGC project aims to consolidate administrative offices and maximize productive work space. The process of developing design standards is the iterative study of varied department processes and workflows. Information obtained in these studies informs the design standards and helps departments better utilize their spaces. This process will identify opportunities for efficiencies such as remote work and collaboration, and promotes equity in work place by considering access to resources like natural light and ventilation.

General Services will develop space utilization standards in the preparatory phase of the new County Government Center, in coordination with the County Administrator and Human Resources, concurrent with developer procurement processes. Development of these standards will include:

- Concept development of office space plans to demonstrate viability of various area standards (SF/person). Concepts will identify balances of employee workstation size with amenities to enhance work experiences;
- Recommendation of adopting policies to guide planning and design;



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- Collating findings to incorporate into the development agreement;
- Codifying space utilization standards as Board Policy for future development;
- Utilizing the new County Government Center project's design process to identify standards for design including finishes, fixtures, etc. that may be applied to existing spaces, owned and leased.
- Maximizing remote work opportunities to aid in space reduction and cost savings to the taxpayer.

METRICS

The percentage reduction in the County's current space utilization usage of 275 Sf/person (Gensler 2012).

Several private industries and Federal and State Governments have established space reduction programs to reduce real estate operational expenses.

Staff expect real estate/leased space expense savings when remote work increases and average workstation sizes decrease.

Data gaps will be addressed with:

- a. Establish a comprehensive program of data needs before start (several examples exist)
- b. Department Head check-ins to ensure no one left behind
- c. Regularly scheduled design review intervals and submittal reviews

COORDINATION & PARTNERSHIP

This objective has direct impacts on several other objectives including:

- RI 1.2 Standards for Office improvements: The new CGC will establish standards that can be applied to existing offices;
 - RI 2.3 Design and build a new, resilient Emergency Operations Center (EOC): The new EOC will be part of the procurement for the new CGC;
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-



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- CAR 3.3 Carbon Eliminating Microgrid: As part of CGC's Triple net-zero goal energy independence and self-generation concepts will be utilized.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

The public will be engaged through a robust engagement program as required by CEQA

The new County Government Center will support partnerships with cities and community stakeholders by ensuring fully accessible in-person facilities and remote access systems. Its proximity to other County services will support increased direct access by residents and build social capital through delivery of services.

Staff will work with leads in the Racial Justice and Social Equity Pillar to address the social equity considerations that could be part of the facility needs assessment and design

FUNDING

The County Government Center (CGC) project will be delivered through a Public-Private Partnership (P3) via a design-build-finance-operate-maintenance agreement. In this model, a developer/concessionaire leverages private financing for the project, for which the County makes annual payments for a specified term. The CGC financing plan is yet to be determined but the Deferred Maintenance fund is likely to be a part of the plan. The developer may have access to Federal funds including Transportation Infrastructure Finance and Innovation Act (TIFIA) or new infrastructure programs in development.

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RESILIENT INFRASTRUCTURE

- Goal 1** Invest in County buildings and technology to enhance service delivery and improve employee mobility
- Objective 3** Develop and implement technology tools that enhance employees' ability to work remotely and promote virtual service delivery models in order to reduce County facility space needs.
- Lead(s)** Dan Fruchey, Ben Toyoda
-

IMPLEMENTATION IDEAS AND PROJECTS

ISD is currently in the process of deploying Microsoft Office 365 for all County of Sonoma employees. Microsoft Office 365 is a cloud hosted environment that provides critical productivity tools and services, including E-mail, document sharing, chat, online meetings, and many other functions. Following are the key benefits to moving to this new platform:

Work better together: You can co-author in your favorite apps including Word, Excel, PowerPoint, and OneNote and edit documents with your coworkers in real-time. Use the new Microsoft Teams tool to meet, chat, call, and collaborate in one place.

Work when and where you need to: Access your files without the need to connect to VPN. Pick up where you left off with Office apps on your devices - Android, iOS, Mac and Windows - to view, edit, and have anywhere access to your files. With a seamless experience across desktop, tablet, and phone, you get the power and flexibility of working on the go.



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Work with the very latest: Work from the newest versions of Word, Excel, PowerPoint, and Outlook. Work with the very latest version of your documents. All the time.

Work with peace of mind: Your files are saved to the cloud, protected from any local disaster events. With AutoSave, your work is saved automatically every time an edit is made. Make changes in a shared document without apprehension knowing that you can view and retrieve past versions of your files at any time. You can also work offline and sync your documents online.

ISD has retained the services of Insight Public Sector for the implementation and deployment of Microsoft Office 365. Approved by the Board of Supervisors on Aug 31, 2021 (consent item 2021-0644).

Following is a high-level timeline for the deployment of Microsoft Office 365:

1. Discovery, Analysis and Design: October 2021
 - a. Kickoff meeting with implementation vendor
 - b. Analysis of current environment
 - c. Preparatory technical tasks prior to implementation and migration
2. Implementation and Data Migration: November 2021 – Second Quarter 2022* (estimate)
 - a. Exchange E-mail migration
 - b. OneDrive migration (U: drive data)
 - c. Teams implementation
 - d. Sharepoint Online implementation
 - i. The migration of S: drive data will take additional time to migrate beyond the second quarter 2022

* Schedule subject to change based on outcome of discovery, analysis and design phase

Hybrid Meetings

The Information Systems Department proposes to evaluate the infrastructure needs for departments to have effective meeting technologies for a hybrid workplace and make technological improvements to accommodate hybrid meetings. Recent increases in employee teleworking trends correspond with a rise in the frequency of hybrid meetings. Hybrid meetings feature at least one group of in-person attendees connecting virtually with other meeting attendees. Following the evaluation of department needs, the County will upgrade priority conference rooms with technology to improve hybrid meetings.



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Through the remainder of the Five-Year Strategic Plan, ISD will continue to evaluate new technologies and opportunities that enhance employees' ability to work remotely and promote virtual service delivery models in order to reduce County facility space needs.

METRICS

In order to ensure the success for this complex project, several key tasks have been completed:

1. Assigned an ISD Project Manager for implementation
2. Created an Executive Team and Advisory Panel that includes representation from many County departments
3. Identified Subject Matter Experts (SMEs) within ISD that will focus on technical tasks
4. Developed a communications plan so as to keep all County employees updated on the progress of the project as well as a training plan

The Microsoft Office 365 deployment will occur in stages by department. Weekly meetings will occur between ISD and Insight to track the overall status of the project. Following are key metrics that will be monitored throughout the duration of the project:

1. **Number of employees who have converted to Microsoft 365, which allows employees to collaborate on work products anytime, anywhere**
2. Number of e-mail mailboxes migrated to Microsoft Office 365
3. Number of user home drives (U: drive) migrated to Microsoft Office 365
4. Number of desktop computers migrated to Microsoft Office 365
5. Number of users enabled for Microsoft Teams
6. Number of department shared folders (S: Drive) migrated to Sharepoint Online

All of the above items will be reviewed weekly and compared with projections that have been developed during the discovery, analysis and design phase. Additionally, we will be reviewing the following business metrics to ensure they are being met:

1. Users are able to access their files from anywhere, anytime, and any device
2. Users are able to utilize Microsoft Teams as an effective collaboration tool
3. Users experience an enhanced ability to work remotely



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COORDINATION & PARTNERSHIP

This objective has an overlap with the following objectives:

- OE1-2 Objective 2: Establish a master list of technology needs that support operational/service improvements by mid-2022, identify enterprise solutions, and develop fiscal strategies to fund and implement improvements.
- OE1-3 Objective 3: Establish expectations and performance measures for customer service for all County departments.
- OE3-1 Objective 1: Implement programs and identify opportunities to support employee work-life balance and a positive work environment, including a Telework Policy.

ISD will reach out to the leads within these objectives with the goal of maintaining continuity and consistency in regards to proposed solutions as well as eliminating duplicative efforts.

ISD will reach out to the City of Santa Rosa to discuss how we may be able to collaborate and partner in common objectives related to mobility tools and reducing facility space needs. The City of Santa Rosa has already expressed interest and ISD will make an effort to reach out to additional cities.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

Climate Change

In addition to the migration to Microsoft Office 365, ISD will be aggressively evaluating the viability of shifting traditional data center compute and storage services to a Cloud based infrastructure. The goal is in alignment with providing the ability to access critical applications and services from anywhere, anytime, and from any device. A significant benefit of this approach is the reduction of power consumption and e-waste. Measurement for success will be determined by establishing a baseline on current power consumption and inventory of current hardware that is present within the data center. As progress continues toward shifting services to a cloud based infrastructure, metrics associated with power consumption and related activities will be reviewed.



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Equity and Community Work

Historically it has been expected that constituents would come to County offices to transact business or obtain needed services. However we have seen a shift in our approach towards providing more remote access to services in the community. This shift is primarily occurring to better support our underserved communities, but more recently it has also helped accommodate changing work requirements associated with COVID response.

For front line workers assisting underserved communities, this shift was demonstrated as County multi-disciplinary teams utilized mobile devices to assist people who were homeless on the Joe Rodota Trail, performed the annual homeless count utilizing new electronic forms, and performed other field work assignments to assist their clients in their homes and public locations.

The need for these tools was underscored as the COVID pandemic progressed. As government offices were closed and thousands of County workers continued their jobs from home, mobility became a critical requirement in conducting all County business. This is particularly true for staff providing direct support to disproportionately underserved communities. An ability to access software applications anywhere at any time is essential to their success. The Microsoft Office 365 Implementation Project will provide the tools necessary for County employees to effectively service the needs of our underserved constituents.

FUNDING

Projected expenses and funding sources for the implementation of Microsoft 365 are as follows:

- Vendor / 3rd party implementation services - \$741,509 in Fiscal Year 2021-22.
- First year licensing - \$1,266,352 for Microsoft 365.
- Staff documentation and training development costs - \$175,000.
- Of the total estimated first year implementation costs of \$2,182,861, \$745,000 is funded from Information Technology resiliency funds provided by Board action during FY2018-19 budget hearings to direct \$1.7 million in General Fund Reserves for Information Systems resiliency projects. These funds are held in ISD Replacement A Fund balance. \$750,509 is included in the appropriated FY 2021-22 ISD operating budget and funded through charges for services. The balance of \$687,352 is funded through ISD Replacement A ACO fund balance.



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Second year licensing and implementation costs are estimated at \$2,015,482, with planned funding from a combination of ISD Fund balance, operating income from services, and use of Information Technology resiliency funds held in ISD Replacement Fund A. As technology continues to evolve, ISD will re-evaluate annually to determine potential fiscal impact and financial needs for future initiatives.



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RESILIENT INFRASTRUCTURE

- Goal 1** Invest in County buildings and technology to enhance service delivery and improve employee mobility
- Objective 4** Establish resilient neighborhood/regional and satellite service centers with access to transportation systems in West County, Cloverdale, and Sonoma Valley, as expressed in the Real Estate Master Plan, by 2023 in order to improve equitable public access to services.
- Lead(s)** Keith Lew

IMPLEMENTATION IDEAS AND PROJECTS

Resilient Infrastructure Objective 1.4 provides direction to establish satellite service centers in West County, North County, and Sonoma Valley. The County organization has long considered the viability of satellite service centers in more remote areas of the County, and the conversation has become an area of focus as the County pursues a down-town location for the new County Government Center.

With the momentum of the County Government Center, departments have participated in analysis to inform the development of satellite service centers. Numerous departments have provided examples of services that could be offered at satellite service centers, ranging from vital records with the County Clerk Recorder Assessor to start-up business assistance from the Economic Development Department.

Staff anticipates that the most critical and high-demand satellite services will be offered by the Human Services Department, the Department of Health Services and the Department of Child Support Services. The Department of Health Services already offers many of their programs in the field, in clients' homes, or collocated with partners such as Health Clinics.



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There are numerous ways to approach satellite services in Sonoma County. This proposal presents three options for the Board's consideration:

1. Mobile Services
2. Property Purchase
3. Lease Agreement

Option 1: Mobile Services

The mobile services option includes the purchase, outfitting and operation of a large vehicle (similar to a recreational vehicle) that could travel to Sonoma Valley, North and West County, providing services to residents who may otherwise have difficulty accessing services. This option could be a pilot program to determine how residents use satellite services before committing to a lease or property purchase. The vehicle could house Human Services and Child Support Services.

General Services estimates that a vehicle could be purchased and modified to provide services within eighteen months to two years of funding approval. Due to COVID lead times to acquire vehicles are unusually long.

Option 2: Property Purchase

This option proposes to purchase existing commercial real estate assets in which to deliver services using a hybrid navigation-based and Local Assistance Center model.

General Services anticipates that real estate could be purchased and improved by the end of 2023.

Option 3: Lease Agreements

This option is similar to purchasing real estate, with the only modification being the leasing of property as opposed to purchase. Leasing real estate would allow departments to deliver services using a hybrid navigation-based and Local Assistance Center model.

General Services anticipates that real estate could be leased and improved within twelve months of funding approval.

METRICS

- Bring options to the Board of Supervisors for funding – Feb. 2022
 - Execute leases or purchase vehicles or property and make necessary improvements – July 2023
 - Provide services – Aug. 2023
-



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COORDINATION & PARTNERSHIP

General Services intends to be in close partnership with departments that would utilize the service centers or vehicles to purchase, design and build infrastructure that will meet the needs of service providers and clients. General Services and departments providing services will coordinate with city jurisdictions and community based organizations to determine opportunities for maximizing efficiencies and effectiveness.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

The Satellite/Mobile Office is in alignment with the Strategic Plan's Healthy & Safe Communities Pillar, Racial Equity and Social Justice Pillar and Resilient Infrastructure Pillar. The purpose of the Satellite Service Center is to provide increased access to safety net programs, while focusing on under-served and under-represented residents.

FUNDING

Option 1: Mobile Services

Funding Sources:

There are no other identified funding sources. The Department of Child Support Services submitted an ARPA request for a van that is large enough to meet the needs of only the department. Combining mobile services for Human Services and the Department of Child Support Services would create efficiencies for the County and community members.

Estimated Project Costs:

General Services based the cost of a vehicle and the cost to outfit on a similar program in San Mateo County. The vehicle identified by General Services would require special licensing for drivers, although there is an interest in finding a vehicle that does not require a special license.

The ongoing costs for fuel and maintenance was developed based on gas costs, historical maintenance costs at regular intervals and possible repairs. The Services and Supplies cost includes costs such as real estate licensing fees for parking the vehicle, costs for internet services, printing materials including ink, paper and printer maintenance and janitorial services.



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The cost for the annual outreach campaigns would cover the cost for printing and distributing flyers with the schedule of services as well as targeted social media advertising. Departments anticipate that they can staff the vehicles with existing staffing levels.

The total project cost for the three-year pilot is \$800,800.

Option 2: Property Purchase

Funding Sources:

General Fund is the only identified funding source. This option was not eligible for ARPA funding. The need for additional sources to fund staffing is unknown.

Estimated Project Costs:

The cost for facility set-up is based on prior experience with acquiring property, designing, space planning, and furniture acquisition. The land acquisition cost is based on market comparables. Services and supplies and annual maintenance and janitorial services costs are calculated using estimated costs for staffing, janitorial, and services and supplies. The cost for the annual outreach campaigns would cover the cost for advertising the new service location. Staffing costs for departments are unknown.

The total three-year project cost would be \$2,182,000.

Option 3: Lease Agreements

Funding Sources:

General Fund is the only identified funding source. The need for additional sources to fund staffing is unknown.

Estimated Project Costs:

The cost for the leased facility option is based on prior experience with leasing property, designing, space planning and furniture acquisition. The cost for the annual outreach campaigns would cover the cost for advertising the new service location. Staffing costs for departments are unknown.

The total three-year cost would be \$1,653,000.



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RESILIENT INFRASTRUCTURE

- Goal 2** Invest in capital systems to ensure continuity of operations and disaster response.
- Objective 1** Strengthen critical communications infrastructure, interoperability, and information technology tools relied upon during disasters.
- Lead(s)** Dan Fruchey, Ben Toyoda, Heidi Keith, Keith Lew, Chris Godley, Pamela Asselmeier

There are two areas of focus to achieve objective 2.1:

Telecommunications Capital Assets: Invest in telecommunication tower construction, maintenance, site acquisition and capital planning. Several County departments collaborate to manage telecommunications tower assets. General Services manages the capital investments and projects to improve communications tower infrastructure (equipment vaults, new towers, backup generators) and manages the leases and licenses associated with County owned and privately owned tower sites. The Sheriff's Office manages the interoperable communications equipment installed on the towers. ISD manages internet based backhaul circuit connections that support the communications broadcast on the microwave and radio channels. The Department of Emergency Management provides guidance on disaster readiness, and oversees the dissemination of information to the public during disasters in coordination with the Sheriff's Office and fire services. The Department of Emergency Management also develops the County's Emergency Operations Plan, which assigns roles and responsibilities relative to disaster response communications. The four County departments collaborate to ensure appropriate investment in capital assets associated with communications infrastructure.

Technology tools: Invest in information technology tools and systems to promote interoperability and cyber security, thus strengthening disaster communications response. ISD has the primary responsibility to implement information technology tools and improve cyber security across all of the County's information technology platforms. Response to cyber security incidents will involve the Sheriff and the Department of Emergency Management, when appropriate.



FOCUS AREA ONE: TELECOMMUNICATIONS CAPITAL ASSETS

IMPLEMENTATION IDEAS AND PROJECTS

Communications Tower and Site Improvements

Communication tower construction, maintenance, site acquisition and capital planning, including:

- Funding and completion of projects to improve and upgraded fire-resistant communication vaults; enhanced protection at existing vaults
- Completion of vegetation management at telecom sites to reduce fire threat
- Complete fire camera coverage across the County to ensure high risk areas have fire cameras installed
- Install cameras higher on existing towers to reduce visibility gaps, provide superior views
- Identify third party towers for co-location access and use of vault space for install of County radio equipment
- Identify private and public partners who control strategic gap sites to collaborate with for mutual benefit
- Create redundancy and backup systems in telecom networks
- Upgrade older communications vaults to be fire/disaster proof

The attached Capital Improvement sheets provide project details including timing:

CIP Request # Project Title _____

R110040 Radio Infrastructure – Communications Towers

Energy Resiliency

- Complete installation of emergency backup generators at critical communication facilities.
-



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The attached Capital Improvement sheets provide project details including timing:

CIP Request # Project Title _____

R220011 New Generator and Power System Upgrades – Sheriff's Main

R220002 Communication Sites Backup Generator Replacement

Communications Equipment Replacement

- Replace obsolete public safety emergency communications equipment.

The attached Capital Improvement sheets provide project details including timing:

CIP Request # Project Title _____

R210010 Replace Emergency Channel Banks at Communications Tower Sites

R200040 Replace Emergency Power System and Base Radios

R210007 Emergency Radio Dispatch System Replacement

R210011 Replacement Test Equipment

Network Management System

- Replace aged components of the Network Management System used by the Telecommunications Bureau for remote monitoring of public-safety radio sites.

The attached Capital Improvement sheets provide project details including timing:

CIP Request # Project Title _____

R210012 Replace Network Management Systems for Remote Monitoring

METRICS



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Communications Tower and Site Improvements

Number of new or improved towers

- Number of new co-located towers
- Number of new towers covering gap areas
- Number of fire-proofed communication vaults
- Number of new fire cameras installed
- Increased percentage of communications tower lease agreements capturing market rate rents
- Number of communication tower sites with vegetation managed to reduce fire threat

Energy Resiliency

- Number of communication facilities supported by alternate and/or emergency power sources.

Communications Equipment Replacement

- Maintain average age not to exceed 10 years of all equipment to avoid failures.

Network Management System

- Maintain average age of equipment not to exceed 10 years.
- Avoid off line/down time.

COORDINATION & PARTNERSHIP

General Services and the Sheriff's Office will coordinate with cities and bordering counties. Partnership opportunities include private companies such as PG&E, UC San Diego/Scripps, federal, state, and local agencies.

- Sonoma County is currently undertaking a new partnership with County of Napa and City of Napa for communications infrastructure at Mt. St. Helena.
 - Sonoma County is exploring new tower relationship with AT&T at Red Mountain/Sugarloaf Park.
 - Sonoma County is exploring new tower relationship with a private owner at English Hill, Sebastopol.
 - Sonoma County is exploring a tower expansion with Verizon at the Sheriff's Main Office on the County Campus.
-



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COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

General Services and the Sheriff's Office will engage the public when it is appropriate during project scoping and implementation.

Telecommunications projects are all climate neutral and provide geographic and service access equity. A robust and healthy telecommunications network insures we are able to respond to calls for service across the County to all citizens and visitors, no matter their location. The Sheriff's Office and County General Services continually seek to leverage funding and seek public/private and intergovernmental partnerships in all telecommunications projects. Potential siting of communications infrastructure (ex. towers) will incorporate equity considerations.

FUNDING

The attached pages from the Capital Improvement Plan provide an overview of unfunded needs for the proposed projects.

Communications Tower and Site Improvements

The attached CIP request R110040 contains information on cost, available general fund and unfunded needs for this project.

The Sheriff's Office has successfully received \$350,000 of grant funding from State Homeland Security Grant Program to partially fund one tower project. General Services and the Sheriff's Office will track and apply for grant opportunities to fund these projects as they become available and as departments have the resources to apply and manage grants. Due to staffing reductions the Sheriff's Office has limited grant tracking, application, and management capacity.

The Board recently allocated \$995,000 for a new fire-resistant vault at Pine Mountain that will protect communications infrastructure, however capital improvement funding from the Board of Supervisors is very limited and is not a sole or major source of funding for the projects in this plan.

Energy Resiliency

The attached CIP requests R220011 and R220002 contain information on costs, available general fund and unfunded needs for this project.



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No grant funds have been applied for, or received for these projects. Potential opportunities include the federal Hazard Mitigation Grant Program (HMGP) and Building Resilient Infrastructure for Communities (BRIC) grant program. General Services and the Sheriff's Office will track and apply for grant opportunities to fund these projects as they become available and as departments have the resources to apply and manage such grants. Due to staffing reductions, the Sheriff's Office is very limited in grant tracking, application, and management capacity.

Communications Equipment Replacement

The attached CIP requests R210010, R200040, R210007 and R210011 contain information on costs, available general fund and unfunded needs for this project.

No grant funds have been applied for, or received for these projects. General Services and the Sheriff's Office will track and apply for grant opportunities to fund these projects as they become available and as departments have the resources to apply and manage such grants. Due to staffing reductions, the Sheriff's Office is very limited in grant tracking, application and management capacity.

The Sheriff's Office received \$180,000 for microwave replacement (CIP R200040) from the Board of Supervisors as part of the FY 21-22 Capital Improvement Plan. Microwaves mounted on communication towers throughout Sonoma County provide the backbone of the entire public safety communications network. A microwave link is a communications system that uses a beam of radio waves in the microwave frequency range to transmit data between two locations. The FY 21-22 funding allows for the replacement of two links in the microwave network.

Network Management System

The attached CIP request R210012 contains information on cost, available general fund and unfunded needs for this project.

No grant funds have been applied for or received for these projects. General Services and the Sheriff's Office will track and apply for grant opportunities to fund these projects as they become available and as departments have the resources to apply and manage such grants. Due to staffing reductions, the Sheriff's Office is very limited in grant tracking, application and management capacity.



FOCUS AREA TWO: TELECOMMUNICATIONS AND INFORMATION TECHNOLOGY TOOLS

IMPLEMENTATION IDEAS AND PROJECTS

ISD will assist the Sheriff's Office, Department of Emergency Management, and Department of General Services in meeting the technical requirements for their respective activities and projects. Departments approach ISD with specific activities or projects so that ISD can determine the technical tasks that will be required to fulfill their stated objectives.

ISD will continue to move forward with projects that are already in progress with the objective of providing network resiliency and high availability during disasters. Reducing reliance on the data center and expanding the use of Internet and Cloud based services will continue to be a primary goal for ISD. ISD will be focusing on the following services in order to provide a highly available infrastructure that is both resilient and secure:

1. Telecommunications Providers – Network and Cellular Services

Providers such as AT&T, Comcast, Verizon, etc. provide the physical or wireless services required to access critical County data center, Internet, and Cloud based services (including Microsoft Office 365).

2. Internet Service Providers – High Speed Internet Services

Internet Service Providers rely on Telecommunications Providers to deliver Internet and Cloud based services. Often the Telecommunications Providers and Internet Service Providers are one and the same. Microsoft Office 365 relies on the Internet to deliver access to the Cloud based service.

3. Cloud Services – Cloud Hosted Applications and Services

In addition to Microsoft Office 365, there are numerous Internet and Cloud based services that are able to deliver critical services, particularly during a disaster. Cloud services are inherently resilient



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by geographically distributing data centers throughout a particular region. Cloud services will continue to play a critical role in delivering technology services as part of a resilient infrastructure. This will be a major component to review with the Hybrid Cloud Design engagement.

4. Cybersecurity – Data Protection Services

All services delivered as part of a resilient infrastructure will require a Cybersecurity component to ensure data integrity and confidentiality. Ransomware, Phishing, and many other security related attacks are on the rise, particularly targeting government agencies. Cybersecurity related services will continue to be a critical element of a resilient infrastructure. Cybersecurity services will be an integral component of a Hybrid Cloud Design.

In order to ensure that ISD provides the services identified above in a manner that is fiscally sound and technically feasible the following activities have been completed or are in progress:

IT Resiliency Efficacy Study

ISD has retained the services of Evolver to perform a resiliency analysis on current initiatives related to Information Technology and Infrastructure Resiliency. Based on its strategic analysis, Evolver recommends that ISD continue to move forward with current projects aimed at providing infrastructure resiliency, cybersecurity and enhanced mobility tools. Evolver identified that through a combination of staff expertise and the experience of real-world events (including wildfires, rolling blackouts, and ransomware attacks), ISD has assembled a sound, well-thought out strategy for evolving the County's IT and operations infrastructure into a more resilient future. With this in mind, the following project is currently underway:

Microsoft Office 365

- a. This project is currently in progress with an estimated completion during the second quarter of 2022. Microsoft Office 365 will allow staff to communicate with voice, video, chat, and document sharing capability within a single, secure and collaborative workspace. This functionality will be available from any type of device, including mobile phones and tablets, laptops and desktops. This capability is particularly critical during periods of disaster. Details regarding this project are highlighted in Resilient Infrastructure Implementation Plan 1.3.



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Hybrid Cloud Design Advisory

ISD has retained the services of ConvergeOne to assist with determining the viability of migrating current data center computing and storage services to a Cloud based infrastructure. This will be achieved through three distinct activities:

- a. Cloud Advisory (assessment, analysis, options, advantages/restrictions, and future state)
- b. Cloud Migration Strategy
- c. Cloud and Network Architecture

Deliverables for this engagement include the following:

- a. Guiding principles on best practices for integration with Cloud services
- b. Migration Strategy based on County's priorities and objectives
- c. Return on Investment (ROI) and Return on Value (ROV) analysis
- d. Recommended Cloud and Resilient Network Architecture and Design

Timeline:

- a. Nov-Dec, 2021
 - i. Requirements gathering
 - ii. Technical workshops
 - iii. Data and workflow analysis
- b. Jan, 2022
 - i. Recommended Cloud and Resilient Network Architecture and Design proposal

METRICS

1. Number of employees who have converted to Microsoft 365, which allows employees to collaborate on work products anytime, anywhere.
 - a. ISD will track milestone objectives throughout the duration of the migration.
2. Completed the Cloud and Resilient Network Architecture Design and Migration Strategy to migrate current data center services to a Cloud based infrastructure to increase resiliency.
 - a. Once the proposed design and strategy have been reviewed and accepted, a timeline and financial analysis will be conducted to determine short and long-term requirements.

COORDINATION & PARTNERSHIP



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This objective has an overlap with Climate Action and Resiliency pillar, objective 3.3:

Invest in County owned facilities, establishing carbon eliminating microgrid technology and improving energy grid resilience to reduce the impact of power loss during power shutdowns and natural disasters (floods, fires, earthquakes), prioritizing critical infrastructure such as command and communications facilities.

ISD will reach out to the leads within these objectives with the goal of maintaining continuity and consistency in regards to proposed solutions as well as eliminating duplicative efforts.

ISD will continue conversations with the City of Santa Rosa and the City of Cloverdale to discuss how we may be able to collaborate and partner in common objectives related to Infrastructure Resiliency. Additionally, ISD will make an effort to reach out to additional cities to determine their interest in participation in these common objectives.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

The goal of the Resilient Infrastructure Pillar is to ensure that essential services will be provided to Sonoma County residents - and the agencies that serve them - in the event of disaster. Communications infrastructure, collaboration tools, critical applications, and many more require the ability to be available at all times, regardless of the circumstances. Additionally, these objectives will reduce the carbon footprint of the data center as services are shifted to a Cloud based infrastructure.

FUNDING

Funding associated with the Efficacy Study and the Hybrid Cloud Design Advisory currently exists within ISD's budget and provides the appropriate revenue source for consultant services. No additional funds are requested for Fiscal 21-22 to complete these initiatives. The recommendations from the Efficacy Study and the Hybrid Cloud Design Advisory will be reviewed to determine the potential fiscal impact and financial needs for future initiatives.

FY 2021-22 implementation costs are as follows:



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The Efficacy Study - IT Risk Assessment and Business Impact Analysis contract, not to exceed \$350K, with Evolver was approved by the Board of Supervisors on 11/17/2020, Item #2020-1031.

The Hybrid Cloud Design Advisory project includes vendor cost of \$49K and associated FY 2021-22 staff costs of \$56.6K.

Both of these efforts are funded by Information Technology resiliency funds provided by Board action during FY2018-19 budget hearings to direct \$1.7 million in General Fund Reserves for Information Systems resiliency projects. These funds are held in ISD Replacement A Fund balance.

The recommendations from the Efficacy Study and the Hybrid Cloud Design Advisory will be evaluated for future changes to infrastructure, cybersecurity, and service areas.

Fiscal impacts of proposed changes will be included in the planning for future initiatives.

Radio-Infrastructure (Various Communication Towers)

Function Area:
Justice Services

Strategic Plan Impact:

Request: R110040

Department/Division:
Sheriff / Radio

Project Description



FIRE RESILIENCY and RECOVERY PROGRAM: To ensure continuance of operations during an emergency: Develop essential communication sites to improve redundancy, fill gaps, and alleviate overloading for emergency response services along coast, West County, North County, and Santa Rosa. As a result of the October 2017 fires, additional scopes of work have been added: Replacement of the communications at Mt. Barham, Sonoma Mt., Fire Sirens, and Fire Cameras. Grant for Fire Cameras require a match of \$680,680 from General Services. The "Radio Needs Analysis Report 8-2009" identified several areas with poor radio communications coverage. Additionally, a number of existing sites need reconstruction. Estimates include radio equipment costs. High public safety priority.

Project Cost	
Acquisition:	0
Design/PM:	6,857
Construction:	14,592
Furniture/Reloc:	0
Other:	2,121
Project Total:	23,570
Current Phase:	N/A

Operation and Maintenance Cost	
Utilities:	0
Maintenance:	0
Other:	0
OM Total:	0
Replacement Value:	N/A
RI Cost:	N/A
RI:	N/A

Service Impact:

Improves emergency response time along Coast.

Available Funding Sources	Prior FYs	Current FY	FY1 2022-23	FY2 2023-24	FY3 2024-25	FY4 2025-26	FY5 2026-27	5YR Total	Future YRs	Project Total
General Fund	5,771	0	0	0	0	0	0	0	0	5,771
Unfunded	0	1,100	3,340	3,340	3,340	3,340	3,340	16,699	0	17,799
TOTALS:	5,771	1,100	3,340	3,340	3,340	3,340	3,340	16,699	0	23,570

SHR-Backup Generator Replacement for Communication Sites

Function Area:
Justice Services

Strategic Plan Impact:

Request: R220002

Department/Division:
Sheriff / Radio

Project Description



FIRE RESILIENCY and RECOVERY PROGRAM: Project will fund backup generators for installation at County maintained public safety communication sites. Backup generators are crucial to ensuring continuity of public safety radio communications during natural disasters and PG&E Safety Power Shutdowns.

Project Cost	
Acquisition:	0
Design/PM:	0
Construction:	0
Furniture/Reloc:	0
Other:	194
Project Total:	194
Current Phase:	INIT

Operation and Maintenance Cost	
Utilities:	0
Maintenance:	0
Other:	0
OM Total:	0
Replacement Value:	N/A
RI Cost:	N/A
RI:	N/A

Service Impact:

Available Funding Sources	Prior FYs	Current FY	FY1 2022-23	FY2 2023-24	FY3 2024-25	FY4 2025-26	FY5 2026-27	5YR Total	Future YRs	Project Total
Unfunded	0	0	0	48	48	48	48	194	0	194
TOTALS:	0	0	0	48	48	48	48	194	0	194

SHR-Channel Bank Replacement

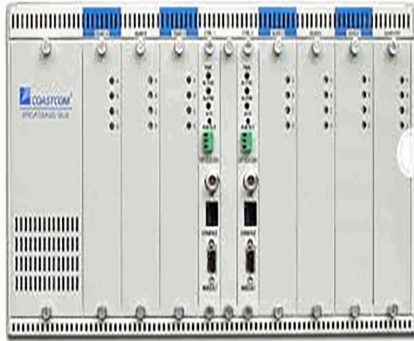
Function Area:
Justice Services

Strategic Plan Impact:

Request: R210010

Department/Division:
Sheriff / Radio

Project Description



FIRE RESILIENCY and RECOVERY PROGRAM: Replace obsolete channel banks at public safety telecommunication sites. Replacement equipment is required in order to ensure the continued operation of public-safety communication sites. Many of the existing Channel Banks in use throughout the County's telecommunications sites have been in service for over 15 years and are nearing the end of their lifecycle. Replacing these critical devices is required in order to keep the public-safety communications network for the Sheriff's Office and REDCOM operational. This multi-year, multi-phase replacement plan will allow the telecommunications Bureau to remove older units from service while providing spares to existing equipment.

Project Cost	
Acquisition:	0
Design/PM:	0
Construction:	0
Furniture/Reloc:	0
Other:	582
Project Total:	582
Current Phase:	INIT

Operation and Maintenance Cost	
Utilities:	0
Maintenance:	0
Other:	0
OM Total:	0
Replacement Value:	N/A
RI Cost:	N/A
RI:	N/A

Service Impact:

Available Funding Sources	Prior FYs	Current FY	FY1 2022-23	FY2 2023-24	FY3 2024-25	FY4 2025-26	FY5 2026-27	5YR Total	Future YRs	Project Total
Unfunded	0	0	116	116	116	116	116	582	0	582
TOTALS:	0	0	116	116	116	116	116	582	0	582

SHR-Replace Sheriff Power System/Base Radios

Function Area:

Justice Services

Strategic Plan Impact:

Request: R200040

Department/Division:

Sheriff / Radio

Project Description



JUSTICE SERVICES and PUBLIC SAFETY PROGRAM: The power systems and base radios have exceeded their reliable life cycles, and will become increasingly difficult to support. Both are required to ensure continuance of daily public-safety operations, and used as reliable support through emergency situations. Critical to County-Wide communications for Law, Fire, Emergency Medical, Parks, Roads, Sonoma County Water Agency, Animal Control, and Transit personnel. They are considered a public safety priority and an asset preservation priority, supporting the Sheriff's Office and Fire/Emergency Service Dispatch Centers. Replacing the power systems benefits all County radio-communications, providing primary direct current (DC) power to base-radios, microwave, and network systems.

Project Cost	
Acquisition:	0
Design/PM:	0
Construction:	0
Furniture/Reloc:	0
Other:	2,249
Project Total:	2,249
Current Phase:	CONST

Operation and Maintenance Cost	
Utilities:	385
Maintenance:	273
Other:	0
OM Total:	658
Replacement Value:	94,627
RI Cost:	11,202
RI:	0.12

Service Impact:

Available Funding Sources	Prior FYs	Current FY	FY1 2022-23	FY2 2023-24	FY3 2024-25	FY4 2025-26	FY5 2026-27	5YR Total	Future YRs	Project Total
Unfunded	0	0	380	380	380	380	380	1,899	0	1,899
General Fund	350	0	0	0	0	0	0	0	0	350
TOTALS:	350	0	380	380	380	380	380	1,899	0	2,249

SHR-Radio Dispatch System Replacement

Function Area:
Justice Services

Strategic Plan Impact:

Request: R210007

Department/Division:
Sheriff / Radio

Project Description



JUSTICE SERVICES and PUBLIC SAFETY PROGRAM: This request is to replace the obsolete radio dispatch system that is currently in use by the Sheriff's Dispatch, REDCOM, SRJC PD, and Transit. The current system has been in use for over 20 years and past the end of its expected lifecycle. A new system would be designed to take advantage of future technologies.

The manufacturer of the current radio dispatch system unexpectedly ceased operations in 2018. This creates a public safety concern due to lack of available spares to support the legacy system. In addition, the existing system is designed around older technology that will not be able to support newer communications systems being purchased by the County.

Project Cost	
Acquisition:	0
Design/PM:	0
Construction:	0
Furniture/Reloc:	0
Other:	3,580
Project Total:	3,580
Current Phase:	N/A

Operation and Maintenance Cost	
Utilities:	385
Maintenance:	273
Other:	0
OM Total:	658
Replacement Value:	94,627
RI Cost:	11,202
RI:	0.12

Service Impact:

Available Funding Sources	Prior FYs	Current FY	FY1 2022-23	FY2 2023-24	FY3 2024-25	FY4 2025-26	FY5 2026-27	5YR Total	Future YRs	Project Total
Unfunded	0	0	716	716	716	716	716	3,580	0	3,580
TOTALS:	0	0	716	716	716	716	716	3,580	0	3,580

SHR-Replacement Test Equipment

Function Area:
Justice Services

Strategic Plan Impact:

Request: R210011

Department/Division:
Sheriff / Radio

Project Description



RADIO TOWERS and INFRASTRUCTURE COMMUNICATIONS PROGRAM: Replace radio frequency test sets used for the performance testing and troubleshooting of public-safety communications systems. New radio frequency test sets are required in order to troubleshoot current and future radio systems infrastructure and radios. Accurate verification of radio operation is required during both initial radio installation and as part of an ongoing maintenance life cycle to meet the requirements of the critical public-safety communications system throughout the County. Advanced testing capabilities will allow the Sheriff's Office Telecommunications Bureau to take advantage of new radio technologies throughout the County.

Project Cost	
Acquisition:	0
Design/PM:	0
Construction:	0
Furniture/Reloc:	0
Other:	221
Project Total:	221
Current Phase:	INIT

Operation and Maintenance Cost	
Utilities:	0
Maintenance:	0
Other:	0
OM Total:	0
Replacement Value:	N/A
RI Cost:	N/A
RI:	N/A

Service Impact:

Available Funding Sources	Prior FYs	Current FY	FY1 2021-22	FY2 2022-23	FY3 2023-24	FY4 2024-25	FY5 2025-26	5YR Total	Future YRs	Project Total
Unfunded	0	0	40	42	44	46	49	221	0	221
TOTALS:	0	0	40	42	44	46	49	221	0	221

All Values are presented in Thousands (1 x 1000)

SHR-Network Management System

Function Area:
Justice Services

Strategic Plan Impact:

Request: R210012

Department/Division:
Sheriff / Radio

Project Description



FIRE RESILIENCY and RECOVERY PROGRAM: Replace aged components of the Network Management System used by the Telecommunications Bureau for remote monitoring of public-safety radio sites. Replacement equipment is required in order to ensure the continued operation of public-safety communication sites. During the Power Safety Power Shutoff, nearly every public-safety radio site managed by the Sheriff's Office Telecommunications Bureau was forced to rely on generator power for the duration. Lack of robust remote-monitoring capability for these sites nearly resulted in several of them completely losing power due to lack of remote fuel monitoring. Replacing the existing equipment will provide the capability to monitor these sites in real-time.

Project Cost	
Acquisition:	0
Design/PM:	0
Construction:	0
Furniture/Reloc:	0
Other:	553
Project Total:	553
Current Phase:	INIT

Operation and Maintenance Cost	
Utilities:	0
Maintenance:	0
Other:	0
OM Total:	0
Replacement Value:	N/A
RI Cost:	N/A
RI:	N/A

Service Impact:

Available Funding Sources	Prior FYs	Current FY	FY1 2021-22	FY2 2022-23	FY3 2023-24	FY4 2024-25	FY5 2025-26	5YR Total	Future YRs	Project Total
Unfunded	0	0	100	105	110	116	122	553	0	553
TOTALS:	0	0	100	105	110	116	122	553	0	553

All Values are presented in Thousands (1 x 1000)



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RESILIENT INFRASTRUCTURE

Goal 2	Invest in capital systems to ensure continuity of operations and disaster response.
Objective 2	Invest in electric power resiliency projects at County facilities, including Veteran's Buildings, used for evacuation sites, warming/cooling centers, or as alternate work facilities for delivery of critical services
Lead(s)	Keith Lew

IMPLEMENTATION IDEAS AND PROJECTS

General Services is currently pursuing the following projects, which directly address the pillar goal by investing in electric power resiliency projects:

- **Energy Master Plan:** The County is partnering with Pacific Gas and Electric (PG&E) through their Sustainable Solutions Turnkey (SST) program. PG&E will develop an Energy Master Plan with the overarching goals of using carbon neutral energy sources and resilient power sources to minimize the impacts of disasters and power shutoffs. This master plan will provide a phased approach to implementation, which will meet the County government's energy needs in an affordable unified manner.
 - **County Campus and Los Guilicos Campus Micro-grid:** Reduce/minimize grid dependence with significantly reduced carbon impacts. These projects are part of the Energy Master Plan. Staff will evaluate solar energy generation systems with substantial battery storage to provide self-sufficiency from grid instability.
 - **New Generator installation program:** Assure continued operations of critical facilities, including shelters, in the event of power shut-offs and disaster events.
 - **Airport Photovoltaic Canopy project:** Reduce/minimize grid dependence with significantly reduced carbon impacts.
-



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METRICS

Metric for each of the above mentioned implementation projects include:

Existing County Campus Micro-grid

- Adherence to project schedule, scope and budget
- Measurement of power demand and energy production compared to the Fuel Cell
- % reduction in kWh usage and kW demand
- % reduction in utility costs

Los Guilicos Campus Micro-grid

- Adherence to project schedule, scope and budget
- Incorporation of currently leased and owned PV systems to act as a unified system in providing electrical service to LG tenants
- % reduction in kWh usage
- % reduction in utility costs

New Generator installation program

- % completion of installation of generators (gas and alternate fuels), or number of generators installed

Airport Photovoltaic Canopy project

- % reduction in kWh usage
- % reduction in utility costs

COORDINATION & PARTNERSHIP

This pillar intersects with Resilient Infrastructure Goal 1 Objective 1: Carbon Neutral New Facilities. Electric power systems must be designed and constructed to incorporate carbon neutral goals.



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COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

As portions of the new Energy Master Plan are executed through the new County Government Center, the public will be engaged through a robust engagement program as required by CEQA.

The new County Government Center will support partnerships with cities and community stakeholders by ensuring fully accessible in-person facilities and remote access systems. Its proximity to other County services will support increased direct access by residents and build social capital through delivery of services.

Staff will work with leads in the Racial Justice and Social Equity Pillar to address the social equity considerations that could be part of the facility needs assessment and design.

FUNDING

The County is in need of a new Energy Master Plan to identify the best method for replacement of the inefficient Hydrogen Fuel Cell that was decommissioned in January 2020. The Board authorized \$130,000 in capital funds to participate in PG&E's Sustainable Solutions Turnkey program, which will result in the development of a new Energy Master Plan. Additional funding requests will be brought forward upon completion of the Investment Grade Audits for prioritized projects recommended by staff.

County Campus Micro-grid: The Board Partially funded in FY 20/21 Capital Plan with \$130,000. Self-Generation Incentive Program (SGIP) incentive for Energy Storage System has been reserved and will cover a portion of the costs of a battery storage system. The microgrid project is a part of the Sustainable Solutions Turnkey program. Financing to support the full cost of the micro-grid may be available from energy efficiency savings from a portfolio of County projects.

Los Guilicos Campus Micro-grid: The Board Partially Funded in FY 20/21 Capital Plan with \$130,000. Self-Generation Incentive Program incentive for Energy Storage System has been reserved that will cover partial costs of battery system.

New Generator installation program: Funding received through grants and department funds (DHS). To date, \$5,976,000 has been received for new generators at Veterans Buildings in Santa Rosa, Petaluma and Sonoma, for the Sheriff's Office, Airport and for Information Systems. Additional projects, specifically for Cloverdale and Sebastopol is in application through Capital Improvements Plan and will seek \$1.6 million.



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Airport Photovoltaic Canopy project: This project is funded through power purchase agreement.





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RESILIENT INFRASTRUCTURE

- Goal 2** Invest in capital systems to ensure continuity of operations and disaster response.
- Objective 3** Design and build a new, resilient Emergency Operations Center (EOC)
- Lead(s)** Keith Lew, Chris Godley

IMPLEMENTATION IDEAS AND PROJECTS

Fundamental to local and state emergency response systems, an Emergency Operations Center provides a centralized location to coordinate response and recovery information and resources. Sonoma County's EOC was designed in the 1970s to serve as a civil defense command center for a county with half the current population. Recent disasters have demonstrated the shortcomings of this design. In all of the post-disaster debriefs, staff identified critical deficiencies in the EOC facility including inadequate workspace and walkways, inflexible workstations, constrained floor plan layout, legacy communications systems, outdated equipment, inadequate noise mitigation, poor lighting, an underpowered HVAC system, antiquated emergency generator, insufficient storage, incomplete ADA compliance, and minimal staff support facilities.

For the rest of this century, climate change and technology disruptions seem certain to increase the frequency and complexity of disasters that will threaten our communities. To meet this challenge, local governments and community organizations will need to grow their disaster preparedness and response capabilities. We will need new systems for managing emergencies as well as new resources and facilities to support these efforts.

The General Services Department (GSD) in partnership with the Department of Emergency Management (DEM) will lead design and construction of the new Emergency Coordination Center (ECC). The new name reflects an evolution in the functions that the facility will support including a greater emphasis on community



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and organizational coordination in response rather than directing the response. The ECC will incorporate new technology and process-driven design in lieu of inefficient and outdated EOC facility models.

The ECC will not just replace the current aging EOC; it will develop and pilot a range of building and system innovations in a new regional facility that will evolve as the nature and complexity of emergencies change. The project will identify and bring together best practices in flexible architecture, technology integration, hazard engineering, and energy resilience to create a dynamically responsive and multi-generation facility. This will enable state agencies, local governments, private sector, and community based organizations to coordinate response efforts more effectively and reduce the impacts of disasters in the community.

The ECC is currently proposed as part of the new County Government Center (CGC) Public-Private-Partnership (P3) procurement project embodying a design/build/finance/operate and maintain approach. The Board of Supervisors on July 27, 2021, provided staff direction to proceed with a preliminary site selection, subject to CEQA, for new County Government Center facilities on the Sears site in downtown Santa Rosa. All told, it will likely take 8 years to complete a new facility in coordination with the other County Government Center administrative facilities.

Major activities and approximate timelines following a design-build-finance-operate-maintain procurement delivery model include:

Procurement for developer	Q1 CY 2022
Conclude negotiations with preferred developer	Q2 CY 2024
Design and CEQA	Q2 CY 2024
Construction	Q3 CY 2025
Occupancy	Q1 CY 2028

METRICS

The County Government Center project will provide overall project metrics including those specific to the ECC facility, including completing the following phases of work:

1. Preliminary Site Selection



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2. CEQA/NEPA Studies
3. Select Developer
4. Financial Close
5. Design & Construction
6. Occupancy/Validation

Adherence to schedule and budget will be primary metrics in monitoring success. Since this is a critical facility, opportunities for improving on delivery of the ECC will be explored with the developer.

COORDINATION & PARTNERSHIP

This project directly supports the Climate Change and Resiliency pillar in Goal 3 (Make County facilities ... resilient) Objective 1 (Design ... County facilities to be carbon neutral ... and incorporate resilient construction techniques and materials). Specifically, the ECC will:

- incorporate an Essential Services construction standard to provide seismic protections for up to a 7.3 magnitude earthquake as well as resilience features that support continued operations in the event of wildfire, flooding, infrastructure failure and degraded air quality;
- feature equivalent LEED v4.1 certified construction techniques/materials and integrated water management systems; and
- house an integrated sustainable energy system with on-site solar electricity production, storage, and distribution.
- Goals of the new County Government Center include “triple net-zero” for waste, water and energy

The County may collaborate with the City of Santa Rosa to co-locate the City's EOC with the ECC. Co-location would support increased pre-disaster and disaster response activities as well as realize cost savings in providing both facilities with safety, security, emergency power, and communications infrastructure. The ECC is also intended to provide facility workspace and systems that could support a municipality should a city be forced out of their primary emergency management facilities.

As funding and space permit, the ECC may also support direct integration of community-based, education and private sector partner organizations in both pre-disaster preparedness efforts as well as response activities.



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COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

Key features of the ECC which support the values and principles identified in the Strategic Plan include:

- A dynamic building design that provides staff with the ability to rapidly scale capabilities by reconfiguring room layouts, building team workspaces, realigning technology systems, and supporting community and first-responder hazard training and exercise programs.
- Drought and fire-resistant design and landscaping features will serve as a community demonstration site for wildfire home-hardening design, materials and technologies.
- The ECC will support partnerships with cities and community stakeholders by ensuring fully accessible in-person facilities and remote access systems. Its proximity to other County services will support increased direct access by residents and build social capital before, during and after disasters.
- Staff will work with leads in the Racial Justice and Social Equity Pillar to address the social equity considerations. While not intended to provide direct service to residents in a disaster, the ECC could include enhanced direct community education and training facilities, expanded engagement communications systems, space and support for community advocacy organizations, and/or increased transparency of County disaster response information and actions.

FUNDING

The recommendation is to develop the ECC facility - as a component of the County Government Center (CGC) project - through a Public Private Partnership (P3) via a design-build-finance-operate-maintenance agreement where a developer/concessionaire would leverage private financing to construct and the County would make annual payments for a specified term. The CGC financing plan is currently in progress but the Deferred Maintenance fund is likely to be a part of the plan. The Deferred Maintenance fund is financed through a portion of the property tax increment. The developer may have access to very low interest Federal funds including TIFIA (Transportation Infrastructure Finance and Innovation Act) RRFIA (Railroad Rehabilitation and Financing Innovation Act) or new infrastructure programs in development.

The design-build aspect of the agreement in the P3 partnership will place the responsibility of design on the developer/concessionaire. The County's responsibility will be to relay required performance criteria to the developer to base the design through a Request for Proposals (RFP). Programmatic requirements of the ECC



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Facility (as with EOC Facilities) are quite complex since functional relationships between the multiple sections of the ECC require a great degree of interaction and coordination. The desired outcome of the design would be a facility that enhances the flow of information and coordination between the sections and facilitate the flow of access to public information. Design-build requirements may take on varying degrees of specificity from basic performance specifications to a conceptual design as part of the RFP.

The ECC project would greatly benefit with pre-design services that include more detailed performance specifications, spatial programming, functional relationship diagrams and suggested layouts of the command center and other sections. The performance specifications would also identify critical facilities requirements including HVAC systems, structural performance, infrastructure for integrated technologies and power resiliency or energy independence. Pre-design services would stop short of an actual design as the developer should be provided as much flexibility to design the project to the most economical construction cost as possible. Pre-design services are projected to cost approximately \$75,000. It is anticipated that grant funds for disaster related programs may be leveraged for pre-design services.

New Emergency Operations Center

Function Area:
Development Services

Strategic Plan Impact:

Request: R200027

Department/Division:
Fire Emergency Services /

Project Description



FIRE RESILIENCY and RECOVERY PROGRAM: The current Emergency Operations Center (EOC) no longer adequately supports the mission of the EOC. To better meet the needs of County residents during a major disaster, a new EOC is needed to incorporate the modern and evolving strategies, systems, and technologies used in disaster response. A new, Class 1 “essential services” standard facility could host other critical County services including an alternate Public Safety Answering Point (PSAP), information data systems, and radio systems. The new EOC will be considered as part of the overall phasing and scope of work for the County Government Center Facility Planning Project R150038. The anticipated cost of preliminary design and programming for the new EOC is \$250,000.

Project Cost	
Acquisition:	0
Design/PM:	9,294
Construction:	8,905
Furniture/Reloc:	0
Other:	725
Project Total:	18,925
Current Phase:	N/A

Operation and Maintenance Cost	
Utilities:	76
Maintenance:	53
Other:	0
OM Total:	129
Replacement Value:	16,591
RI Cost:	7,345
RI:	0.44

Service Impact:

Available Funding Sources	Prior FYs	Current FY	FY1 2022-23	FY2 2023-24	FY3 2024-25	FY4 2025-26	FY5 2026-27	5YR Total	Future YRs	Project Total
Unfunded	0	0	550	4,594	4,594	4,594	4,594	18,925	0	18,925
TOTALS:	0	0	550	4,594	4,594	4,594	4,594	18,925	0	18,925



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RESILIENT INFRASTRUCTURE

- Goal 3** Continue to invest in critical road, bridge, bicycle, and pedestrian infrastructure.
- Objective 1** Continue to maintain road segments, including designated turnouts where feasible, increase efforts on vegetation removal and drainage features, and improve pavement conditions in neighborhoods.
- Lead(s)** Janice Thompson, Johannes Hoevertsz

IMPLEMENTATION IDEAS AND PROJECTS

TPW will undertake a variety of projects maintain road segments, including designated turnouts where feasible, increase efforts on vegetation removal and drainage features, and improve pavement conditions in neighborhoods. The actions center on three areas of focus: **vegetation removal, drainage feature improvements and road pavement condition improvement**. These activities, discussed in detail below, help our county prepare for any upcoming fire disasters most likely to impact residents and businesses in geographically isolated locations. Those in more isolated areas of the county have fewer evacuation options than those who live in urban areas. By focusing on vegetation management along the road right of way, we not only help to prevent wildfires caused by passing motorists/sparks/etc., but also reinforce established evacuation routes for affected residents.

TPW will undertake the following projects and actions to achieve the objective:

- Fire fuel reduction in geographically isolated areas, completion in December 2021
 - The Sonoma County Board of Supervisors approved three TPW and community partnerships to tackle fire fuel reduction in geographically isolated areas, amounting to over 25 miles of vegetation removal in Sonoma County:
 - Cavedale and Trinity Roads, led by the Maycamas Fire Safe Council
 - Sweetwater Springs/Mt. Jackson, led by Circuit Riders
 - Wilshire, Crystal, Donner and Dana Drives, led by the Wilshire Heights Mutual Water Company
- Fuel reduction in the right of way with completion in December 2021



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- TPW is partnering with Northern California Conservation Corps to perform fire fuel reduction work within the road right of way. Work is being performed along a total of five miles along Grove Street near Sonoma and in and around Occidental. These roads serve as key emergency egress routes serving approximately 6,000 total residents.
- Hazardous Tree Removal Program
 - Eucalyptus tree removal in the Santa Rosa Rural Cemetery (D3) and 8th St E in the Sonoma area (D1) by December 2022.
 - D2 project in Penngrove
 - D4 and D5 projects to be identified
 - Other priority hazardous tree and vegetation removal projects as identified by the Board in collaboration with communities by 2025
- PG&E Settlement Tier 2, Generational projects including the addition of turnouts
 - Turnouts in roadways can improve safety during an evacuation. Completion by 2026.
- PG&E Settlement Tier 1 and Tier 1 Plus, Pavement Repairs
 - Repair fire debris haul damage to pavement in 2022 and 2023 caused after the 2017 fires.
- Increase TPW's vegetation removal policy as of 2020 and on-going
 - Increase TPW's vegetation maintenance removal policy from two feet to four feet from the edge of pavement.
- Increase culvert replacements as of 2020 and on-going
 - Enter into contracts for additional culvert replacement contracts to supplement maintenance culvert replacement.
 - Include drainage improvements in the annual paving work under the Pavement Preservation Program

METRICS

The metrics listed below are based on construction activities measured by contract work or maintenance crew activity report. We do not anticipate any gap in data.

- Fire fuel reduction in geographically isolated areas
 - The County will track the number of miles of roadside fire fuel reduction.
-



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- Hazardous Tree Removal Program
 - Award of a contract for the tree and vegetation removal. The County may be able to measure the number of trees removed and area cleared.
- PG&E Settlement Tier 2, Generational projects including addition of turnouts
 - Award of a contract for the construction of turnouts, and a metric will be the number of turnouts built.
- PG&E Settlement Tier 1 and Tier 1 Plus, Pavement Repairs
 - Award of a construction contract for the pavement repairs. One metric could be how many miles of pavement is repaired, or the increase in Pavement Condition Index on the repaired roads.
- TPW's Vegetation removal policy
 - Report the number of miles of road with increased vegetation removal, creating safer evacuation routes and reduced risk for fires started by sparks from automobiles.
- Increase culvert replacements
 - Board award of a contract for the additional culvert replacement. Another metric will be the number of culverts repaired by contractors and road maintenance crews.

COORDINATION & PARTNERSHIP

TPW's goals are unique in that they are limited to work in the County's public right-of-way. We are committed to looking for partnerships with neighboring cities. TPW has partnered with several community groups to meet the goals of this objective.

- Job skills training for vegetation maintenance
 - TPW has partnered with State of California Human Development (CHD) in a program that provides job skill training for road maintenance activities including vegetation removal, culvert cleaning and ditch re-establishment in the LNU Fire areas, including Sweet Water Springs Road.
- Fire fuel reduction in geographically isolated areas
 - The Sonoma County Board of Supervisors approved three TPW and community partnerships to tackle fire fuel reduction in geographically isolated areas, amounting to over 25 miles of vegetation removal in Sonoma County:
 - Cavedale and Trinity Roads, led by the Maycamas Fire Safe Council



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- Sweetwater Springs/Mt. Jackson, led by Circuit Riders
- Wilshire, Crystal, Donner and Dana Drives, led by the Wilshire Heights Mutual Water Company
- Fuel reduction in the right of way

TPW is partnering with Northern California Conservation Corps to perform fire fuel reduction work within the road right of way, creating a shaded fuel break by selectively cutting and removing vegetation. Work is being performed along a total of five miles along Grove Street near Sonoma and in and around Occidental. These roads serve as key emergency egress routes serving approximately 6,000 total residents.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

The outcome of this objective will benefit all communities in Sonoma County, creating geographic equity of services. The fire fuel reduction efforts being performed Countywide will provide improved evacuation routes in geographically isolated areas. TPW supports community groups in their efforts to reduce fire fuel. The partnerships with community groups engage the public and assist in implementation of the services. The drainage culvert projects and the roadway turn-out projects are spread throughout the County in geographically isolated areas to promote equitable services. Reports from the public of localized maintenance issues through our website and SoCoReportIt app provide public engagement and ensure equity in service. Climate effects are anticipated to be reduced with the removal of fire fuels, minimizing wildfire disaster conditions.

FUNDING

TPW routinely seeks Federal and State funding partnerships. ARPA funds are not applicable to this objective, and no staffing changes are proposed to meet our goal.

- Job skills training for vegetation maintenance
 - TPW has partnered with State of California Human Development (CHD) in a program that provides job skill training for road maintenance activities. The program provides the labor at no cost to the TPW.
- Fire fuel reduction in geographically isolated areas
 - Sonoma County Board of Supervisors provided one-time PG&E Settlement funding for the grants.
- Fuel reduction in the right of way



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- This work is estimated to cost \$78,670 and will be funded by Proposition 68.
- Hazardous Tree Removal Program
- Funding allocation for projects under this program \$2.5M sourced by PG&E Settlement Funds. PG&E Settlement Tier 2, Generational projects including turnouts
 - The project is funded with one-time PG&E Settlement Tier 2 funds, and the project cost is estimated \$20 Million.
- PG&E Settlement Tiers 1 and Tier 1 Plus, Pavement Repairs
 - The project is funded with one-time PG&E Settlement Tier 1 and Tier 1 Plus funds, and the project cost is estimated \$34.8 Million.
- TPW's Vegetation removal policy
 - The ongoing increased cost associated with this policy change will be funded with road maintenance funds.
- Increase culvert replacements
 - The ongoing increased cost for the culvert replacement contract will be funded with road maintenance funds supplemented by SB1 funds.



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RESILIENT INFRASTRUCTURE

- Goal 3** Continue to invest in critical road, bridge, bicycle, and pedestrian infrastructure.
- Objective 2** Increase investment by 5% annually on preventive maintenance on all road infrastructure/facilities.
- Lead(s)** Janice Thompson, Johannes Hoevertsz

IMPLEMENTATION IDEAS AND PROJECTS

TPW will increase drainage improvements and vegetation removal preventative maintenance services by 5% annually by developing new partnerships, implementing new programs and undertaking additional projects. TPW will focus on activities that improve drainage facilities, and removing vegetation in road right of way. These partnerships, programs and projects include:

- Community partnerships and providing Job skills training for increased vegetation maintenance
- Fire fuel reduction in geographically isolated areas
- Fuel reduction in the right of way
- Hazardous Tree Removal Program
- TPW's Vegetation removal policy
- Increase culvert replacements

Many of the projects outlined above are long-term programs and significant projects that will require dedicated staff time in the coming years. However, TPW will continue to evaluate opportunities to increase vegetation removal and drainage improvements maintenance services beyond the currently identified activities over the next five years. This objective will be updated as additional opportunities become available.

METRICS

Completed Vegetation Removal and Culvert Replacement Projects



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The metric used to gauge success is a percent increase in annual vegetation removal and drainage improvement preventative maintenance services on all road infrastructure and facilities. TPW's partnerships for fire fuel reduction services through grants will be reported with the completion of the projects. Culvert replacement will be reported through the completion of the following: culvert replacement construction projects, drainage work and culvert replacement with annual Pavement Preservation construction projects. The road, bridge, bicycle and pedestrian conditions will improve with this increased preventative maintenance activity. We do not anticipate any gap in this data.

COORDINATION & PARTNERSHIP

TPW is partnering with several community groups to meet the goals of this objective. TPW will continue to look for partnership opportunities in the future. Existing partnerships that will contribute to the activities identified in this objective include:

- Job skills training for vegetation maintenance
 - TPW has partnered with State of California Human Development (CHD) in a program that provides job skill training for road maintenance activities
- Fire fuel reduction in geographically isolated areas
 - The Sonoma County Board of Supervisors approved three TPW and community partnerships, amounting to over 25 miles of vegetation removal in Sonoma County:
 - Cavedale and Trinity Roads, led by the Maycamas Fire Safe Council
 - Sweetwater Springs/Mt. Jackson, led by Circuit Riders
 - Wilshire, Crystal, Donner and Dana Drives, led by the Wilshire Heights Mutual Water Company
- Fuel reduction in the right of way
 - TPW is partnering with Northern California Conservation Corps to perform fire fuel reduction work within the road right of way. Work is being performed along a total of five miles along Grove Street near Sonoma and in and around Occidental.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

These goals for this objective will benefit all communities in Sonoma County, creating geographic equity of services. The fire fuel reduction efforts being performed Countywide will provide improved evacuation routes in



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geographically isolated areas. TPW supports community groups in their efforts to reduce fire fuel. The partnerships with community groups engage the public and assist in implementation of the services. The drainage culvert projects are spread throughout the County in geographically isolated areas to promote equitable services. Reports from the public of localized maintenance issues through our website and SoCoReportIt app provide public engagement and ensure equity in service. Climate effects are anticipated to be reduced with the removal of fire fuels, minimizing wildfire disaster conditions.

FUNDING

TPW routinely seeks Federal, State and community-based funding partnerships. With direction from the Board of Supervisors, and with support from funding partners, TPW is able to meet this objective with the current funding levels.

Descriptions of funding sources for the activities identified in this implementation plan:

- Job skills training for vegetation maintenance
 - TPW has partnered with State of California Human Development (CHD) in a program that provides job skill training for road maintenance activities. The program provides the labor at no cost to the TPW.
- Fire fuel reduction in geographically isolated areas
 - Sonoma County Board of Supervisors provided one-time PG&E Settlement funding for the grants.
- Fuel reduction in the right of way
 - This work is estimated to cost \$78,670 and will be funded by Proposition 68.
- Hazardous Tree Removal Program
 - This work will be funded with one-time PG&E Settlement funds, of \$2,500,000.
- TPW's Vegetation removal policy
 - The ongoing increased cost associated with this policy change will be funded with road maintenance funds.
- Increase culvert replacements
 - The ongoing increased cost for the culvert replacement contract will be funded with road maintenance funds supplemented by SB1 funds.

ARPA funds are not applicable. We do not propose any staffing changes to meet the objective.



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RESILIENT INFRASTRUCTURE

- Goal 3** Continue to invest in critical road, bridge, bicycle, and pedestrian infrastructure.
- Objective 3** Invest \$5 million by 2024 on new pedestrian and bicycle facilities, and adopt maintenance guidelines on roads to consider bicyclists and pedestrians.
- Lead(s)** Janice Thompson, Johannes Hoevertsz

IMPLEMENTATION IDEAS AND PROJECTS

Based on direction from the Board of Supervisors, TPW has plans to incorporate new pedestrian and bicycle facilities on our County roads whenever possible.

For capital projects, TPW has an existing design process that includes review of the Sonoma County Bike Plan and compliance with the plan wherever possible, as well as a referral process to Sonoma County Bicycle and Pedestrian Advisory Council (SCBPAC).

TPW has three projects in the design process to meet the objective of investing \$5 million by 2024 for new pedestrian and bicycle facilities:

Arnold Drive Bike Lanes

- The project involves shoulder widening to add bike lanes on Arnold Drive between Country Club Lane and Madrone Road. This project will provide just under 2 miles of new bike lanes in the Sonoma area. Currently in the design phase, the project is expected to be constructed in 2024.

Mark West Springs Sidewalk

- The Mark West Springs Sidewalk project currently in design. The project involves new sidewalk on both sides of Mark West Springs Road between Old Redwood Highway and Ursuline Drive. This will provide one-half mile of new sidewalk serving the Larkfield /Wikiup community in northeast Santa Rosa area. Currently in the design phase, the project is expected to be constructed in 2022.
-



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Crocker Road Bridge Sidewalk Addition

- The project includes the addition of a wide sidewalk on the north side of the bridge, providing a much-needed pedestrian path for the Cloverdale area community. Currently in the design phase, the project is expected to be constructed in 2024.

Regarding road maintenance, TPW's Road Maintenance Guidelines address all modes of transportation. Our Road Assessment Guideline, created in 2019, ensure that staff includes pedestrian and bicyclist facilities in our inspection, assessment and repair of our County roadways. Road Maintenance staff maintains and improves pedestrian and bicycle facilities when performing road maintenance activities.

METRICS

The measurement metric for the three capital projects will be an approved construction contract award from the Board and the completion of the bike lanes and sidewalks.

- Arnold Drive Bike Lanes – nearly 2 miles of added bike lanes in the Sonoma area
- Mark West Springs Sidewalk - one-half mile of new sidewalk serving the Larkfield /Wikiup community
- Crocker Road Bridge Sidewalk Addition – addition of sidewalk on the bridge in the Cloverdale area

Regarding road maintenance, the metric of completed service requests will provide the data demonstrating the objective has been met.

TPW does not anticipate any gaps in the data

COORDINATION & PARTNERSHIP

The specific capital projects include funding partnerships, discussed below, and TPW will continue to look for opportunities to partner for bike lane and sidewalk maintenance activities.

TPW will coordinate with the City of Cloverdale to improve infrastructure and connectivity with the new sidewalks to be constructed on Crocker Road Bridge.

The Arnold Drive Bike Lane project has overlap in the Climate Action and Resiliency Strategic Plan Pillar, through TPW's Bikeable Sonoma County project. We can apply for future funding in 2024 from the Climate Resilience Fund established by the Board of Supervisors.



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COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

The capital projects are distributed around Sonoma County in the east, north and central portions of the County creating geographic equity of services. The design phase of the projects include public engagement through seeking input from the public at public meetings.

The capital projects serve the following benefits:

The additional bike lanes on Arnold Drive may provide an alternative mode of transportation in disadvantaged neighborhoods within the County.

The additional sidewalk on Mark West Springs Road will provide Riebli Elementary School with a safe pedestrian pathway.

The added sidewalk on the Crocker Road Bridge will provide a pedestrian link between disadvantaged neighborhoods to the east and downtown Cloverdale shops and businesses and safe access to the Russian River.

By adding to the existing network of bicycle and pedestrian pathways, TPW is creating a more expansive transportation route for those not utilizing cars, either by choice or necessity. For some, cars are cost-prohibitive. Bicycle and pedestrian routes offer a viable alternative to lower income populations and the community at large. Additionally, fewer cars on the road provide benefits to the climate impacts.

The road maintenance guidelines and resulting activities will benefit all communities in Sonoma County, creating geographic equity of services and providing viable alternate modes of transportation.

FUNDING

The capital projects leverage funding from multiple sources including Measure M and federal sources.

Arnold Drive Bike Lanes

The project cost is estimated at \$4 million and includes tree removal, environmental permitting for lengthening drainage structures, stormwater treatment, right-of-way acquisition and utility relocation. SCTA's Measure M one-time funding in the amount of \$2,350,000 is programmed and we are looking for the remaining \$1,650,000 in future Federal funding or SCTA's future Go Sonoma program or other funding sources for construction funds in 2024.



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Additionally, TPW submitted an application to the Climate Resilience Fund established by the Board of Supervisors as part of the Climate Action and Resiliency Strategic Plan Pillar. The County anticipates determining funding allocations in early 2022.

Mark West Springs Sidewalk

Project cost is estimated at \$2.3 Million and includes \$1 Million from one-time Measure M funds. TPW is currently seeking the remaining \$1.3 Million in future Federal funding programs. If TPW is not successful in their Federal funding applications they may seek funding from the Board of Supervisors. TPW has applied for the Quickstrike Federal Stimulus funds but our application was not awarded.

Crocker Road Bridge Sidewalk Addition

The estimated project cost of \$4 Million includes one-time Federal Bridge funding and local match of 11.47% in the amount of \$458,800.00. The funding for this local match is County Road funds.

Road Maintenance Guidelines require no additional funding for this on-going policy.

ARPA funding is not applicable and no staffing changes are included to be the objective.



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RESILIENT INFRASTRUCTURE

- Goal 3** Continue to invest in critical road, bridge, bicycle, and pedestrian infrastructure.
- Objective 4** Identify and retrofit bridges in the County that are at high risk for damage during earthquakes
- Lead(s)** Janice Thompson, Johannes Hoevertsz

IMPLEMENTATION IDEAS AND PROJECTS

Sonoma County has 328 bridges, one of the highest volumes of bridges of any County in California. As most of the bridges were constructed a long time ago, TPW has developed a rigorous bridge program to maintain, retrofit and replace bridges.

TPW has 16 active bridge replacement or retrofit projects, nine of which will include seismic improvements:

1. Boyes Blvd – currently under construction, completion expected December 2021
2. Little Wohler – currently under construction, completion expected March 2022
3. Big Sulphur
4. Big Wohler
5. Chalk Hill
6. Lambert
7. Monte Rio
8. Pena
9. Watmaugh

Bridge projects are very different from road construction projects. There is a long lead time for design, due to environmental permitting issues. Communities are much more engaged and feel greater ownership for a bridge in their community. TPW recognizes and supports a greater community outreach for bridge projects. Additionally, right-of-way acquisition is typically necessary and this is a long process. A typical timeframe for a bridge project is a minimum of 7 years and can take as long as 20 years.



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TPW is committed to delivering the projects listed above in the next 5-10 years, as these are existing projects already started. The projects are in various phases such as design, right-of-way and construction. This staggered phase allows our bridge program to continue carrying so many projects. The bridge team is structured to deliver the projects listed above, and take on new projects current projects are completed.

METRICS

Measures of success for this objective could be the phases of each project, including completing the design, the right of way, environmental permitting, awarding a construction contract, and the completion of construction.

COORDINATION & PARTNERSHIP

TPW routinely coordinates with neighboring cities on construction projects as needed. TPW will partner with community groups as the opportunities arise.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

These projects fall in all areas of unincorporated Sonoma County, ensuring that residents have geographically equitable services. TPW pursues and leverages federal funding for all bridge projects. Contracting includes Disadvantaged Business Enterprise (DBE) goals to encourage participation of small, minority and women owned businesses.

Public engagement plays an important role in our bridge projects. During the preliminary engineering and design phase, we host numerous public meetings to seek community input on a variety of design factors. Advance public notification to the nearby community is issued in both English and Spanish languages. We accept all forms of communication to ensure we receive full and equitable input.

FUNDING

Bridge projects are very expensive and TPW relies on Federal funds to complete our bridge work. The Federal Highway Administration (FHWA) has several funding programs that allow TPW to pursue bridge retrofit and replacement projects. Bridge program one-time Federal funding varies by program and includes between zero and 11.47% local match funding requirement. The County uses County Road funds for this local match.



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Bridge projects come with an expensive price tag. Bridge projects typically cost between \$8,000,000 and \$20,000,000. Larger scale bridge projects such as Monte Rio can exceed this typical cost. In addition to the cost of a new structure, there are environmental mitigation costs for tree removal and work within a waterway, right-of-way costs, utility relocation and traffic impact costs. The preliminary engineering and environmental work takes much longer on a bridge project than on a road project. Environmental permitting on a bridge project is a long process, requiring dedicated time and resources. Bridge projects generate a heightened sense of community sensitivity. Community outreach efforts are vital to our bridge program, and take time and resources.

TPW considers our bridge program funded with FHWA funds.

ARPA funds do not apply and staffing changes are not included to meet this objective.



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RESILIENT INFRASTRUCTURE

Goal 4 Continue to invest in critical road, bridge, bicycle, and pedestrian infrastructure.

Objective 1 & 2 1. Leverage funding and seek grants to expand communications infrastructure within the community to improve equitable access to broadband, wireless, and cell phone services. 2. Leverage existing fiber optic infrastructure and grant opportunities to expand wireless and broadband access across the County.

Lead(s) Janice Thompson, Johannes Hoevertsz

IMPLEMENTATION IDEAS AND PROJECTS

Over the last few years, catastrophic wildfires, prolonged power outages, floods, and the coronavirus pandemic have spotlighted the growing Digital Divide in Sonoma County as it continues to affect public safety and livelihood. During past wildfires and floods, residents living in high fire threat areas or flood zones relied on receiving mandatory evacuation orders from first responders to evacuate their homes; however, communities without connectivity struggled to or could not receive notifications. As the community experience the current coronavirus pandemic, students and parents are telecommuting to school and to work without high-speed broadband internet connectivity at home and do not have the necessary resources to support an educational experience equal to those in served communities. Similarly, residents working from home without connectivity struggle to telecommute as well.

Rural and urban communities across Sonoma County face economic disenfranchisement, upward mobility, and failed economies due to inadequate broadband access, and recent disasters have heightened the need to invest in critical infrastructure within our economy to address economic recovery and resiliency.

A lack of infrastructure capable of supporting speeds and services necessary to survive and succeed in our current economic and social climate is negatively affecting residents. As the world evolves and our dependency for bandwidth rises, our existing infrastructure is not capable of supporting our economy's current and future need for broadband internet access.



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Fortunately, state and federal legislators have generated billions of dollars in funding opportunities available to local governments and not for profits to deploy broadband infrastructure. The future availability of funding has caused many local governments to identify solutions to position their jurisdictions to apply for and receive funding.

The Economic Development Board will explore the creation of a publicly governed broadband entity that has the ability to deploy, own, and manage countywide broadband infrastructure. The organization could expand upon existing infrastructure, as well as develop new infrastructure that will be managed by the new broadband entity and leased to the public and private sector. Broadband infrastructure will include both wireline and wireless assets in order to expand broadband internet and cellular access throughout unserved communities.

Expanding broadband access through infrastructure projects and adoption programs creates immeasurable opportunities for resiliency in Sonoma County, including improved:

- Public safety communications
- Resource conservation in agriculture and other industries
- Education experience
- Workforce development, retention, and attraction
- Accessibility of healthcare services
- Government operations and emergency response
- Residential and business applications that improve operational efficiencies
- Livability

To achieve this, the Economic Development Department is exploring the creation of a publicly governed broadband entity broadband as well as creating a business plan to support the organization. The organization must be able to:

- Apply for state and federal broadband infrastructure funding. This includes leveraging local funding, such as ARPA, and partnerships with other state agencies, like Rural County Representatives of California
- Manage the deployment of broadband infrastructure in Sonoma County
- Work with broadband service providers to create a financially sustainable open-access network that provides market or below market rates to currently unserved residents

While the Economic Development Department studies the optimal structure to manage broadband infrastructure and an open-access network, the department continues to find opportunities to leverage available funding. The



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department recently recommended that the Board of Supervisors opt into the Rural County Representatives of California broadband joint powers authority. The JPA, named Golden State Connect Authority, will give Sonoma County the opportunity to compete to utilize the Loan Loss Reserve Fund, which the state anticipates bringing online shortly.

Timeline:

January – June 2022: Analyze organizational structures and develop potential business plans for the Board of Supervisors to consider

June – December 2022: Create the selected organization and begin evaluating projects and appropriate funding sources

METRICS

Measures of success:

- The amount of grant and other funds awarded
- The amount of grant and other funds leveraged
- The increase in the number of residents served
- The number of miles of additional fiber/conduit

EDB launched a speed test initiative to collect broadband availability data at the household level to support grant funding applications and network deployment strategy. In addition, the CPUC and various state agencies provide data and technical assistance to support regional broadband deployment.

COORDINATION & PARTNERSHIP

The proposed activities will include oversight from a range of stakeholders that represents Sonoma County's jurisdictions in order to prioritize network deployment projects based on strategic decision-making and regional coordination. This includes partnerships with public agencies including cities and special districts, and state agencies, such as Rural County Representatives of California (RCRC), Corporation for Education Network Initiatives in California (CENIC), and others. So far, cities that have expressed interest include the cities of Santa



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Rosa, Healdsburg, Cloverdale, Petaluma, and Sonoma. Collaboration includes coordination on regional policy that reduces the cost of broadband deployment, including dig once/trench smart, streamlined permitting, and others areas.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

The proposed activities uphold the value of climate resiliency by building infrastructure that directly supports real world applications that reduce the environmental impact via technology optimization that results in conservation of resources. The proposed activities uphold the values of equity through proactive outreach and engagement while planning and deploying infrastructure projects or broadband adoption programs in marginalized communities.

FUNDING

Staff intend to pursue as many state and federal funding opportunities to support this initiative and the deployment of broadband infrastructure in Sonoma County. Grant agencies include the California Public Utilities Commission, Economic Development Administration (EDA), United States Department of Agriculture (USDA), National Telecommunications and Information Administration (NTIA), and others. As a result of SB 156, the state has generated \$6 billion for broadband deployment, allocating \$2 billion towards last mile broadband connections, \$3.75 billion towards construction of a state-owned middle mile network, and \$750 million to create a loan-loss fund to assist local governments and non-profits in financing broadband service projects. ARPA funds broadband infrastructure as well and is the most flexible federal funding option currently available, in comparison to other existing programs. In addition, local funds may be leveraged through county, city, and special district programs.

A network deployment project typically requires a grant writer and project manager for the initial planning stages all the way through the deployment process. The County allocates funding for a .5 FTE Broadband Analyst, as well as grant researching and writing on an annual basis. In FY 21-22 the County Administrator's Office budgeted \$150,000 for grant research and on-call grant writing. The CAO may use these funds for grant writing if broadband grants become available in FY 21-22, while using existing staff capacity. In addition, project development can involve partnerships with several other organizations that provide their resources to assist with implementation and seeking additional funds. Depending on the project location, these groups can include community groups, local government, cities, internet service companies, regional broadband consortium, community based organizations, consultants, volunteers, and many more.



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Funding solutions:

Funding mechanisms used to support broadband infrastructure and adoption projects are listed below in order of priority.

Funding Source	Funding Frequency	Funding Estimation
State and federal broadband grants for last/middle mile infrastructure	One Time	Estimated \$150-300 million over next 5-10 years for construction
Revenue from infrastructure leasing and other organization services	Ongoing	\$3-5 million per year
Public/private investment	One Time/Ongoing	Depends on partners and projects
Municipal bonds	Ongoing	Depends on partners and projects
Private loans	One Time/Ongoing	Depends on partners and projects
Tax assessments	Ongoing	¼ cent sales tax in the unincorporated area generating approximately \$10,000,000/year

Capital expenditures for fiber networks are one time, which usually lasts several decades before requiring additional funding for upgrades or replacement. This includes material and labor required for installation, such as heavy machinery and equipment rentals, conduit and cabling, vaults, hand holes, enclosures, customer premise equipment, permitting, design and engineering, project management, and more. Operational expenditures are ongoing and include costs for network operation, broadband internet service, network maintenance, broadband internet uplink/backhaul services, and additional overhead costs for staffing, utilities, and other expenses. The Economic Development Department will complete the analysis of governance organizations with existing staff and contracts. Staffing for a governance organization is yet to be determined.



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RESILIENT INFRASTRUCTURE

- Goal 5** Support, fund, and expand flood protection.
- Objective 1** Develop partnerships with cities, tribal governments, and private organizations regarding flood protection and sustainability to identify gaps and address climate change impacts.
- Lead(s)** Alex Rosas, Permit Sonoma
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IMPLEMENTATION IDEAS AND PROJECTS

Permit Sonoma will bring together public and private organizations to discuss and explore the community's needs for adequate flood protection measures. This type of collaboration would allow the county to receive input from multiple stakeholders, which would then be incorporated into recommendations for decision makers to select action items and prioritize further efforts to support, fund, and expand flood protection measures and policies.

Permit Sonoma will use its existing resources and partnerships with various organizations to reach out to stakeholders, solicit input, and develop recommendations to achieve this objective. Some potential activities would include:

- Reviewing existing partnerships to determine if a group or forum already exists with a similar mission and/or key players. Coordinate with County staff who may be working on similar objectives that could benefit from collaboration.
 - Coordinating with tribal, local, state, and federal agencies.
 - Creating an advisory group representing the community's needs and diversity with representatives from tribal, local, state, and federal agencies who will identify gaps in flood protection and work to address flooding impacts created by climate change.
 - Researching and vetting historical and current data and/or information available on flood protection in Sonoma County and flooding impacts created by climate change.
 - Identifying opportunities for enhanced partnerships, such as partnerships between Sonoma Water and cities for more comprehensive flood control solutions.
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- Determining opportunities for efficiencies including programmatic Environmental Impact Reports.
- Identifying regional priorities for flood control and positioning projects for grant funding.

Proposed timeline and milestones include:

- Outreach to tribal, local, state, and federal agencies by the first quarter of 2022.
- Creation of advisory group by second quarter of 2022.
- Soliciting input from stakeholders by third quarter of 2022.
- Development of recommended action items by fourth quarter of 2022.

METRICS

To demonstrate progress towards achieving this objective, Permit Sonoma would:

- Establish an advisory group with representatives from tribal, local, state, and federal agencies who will identify gaps in flood protection and work to address flooding impacts created by climate change.
- Establish a database identifying each partner with contact information as well as their roles, responsibilities, interests, assets, contributions, etc.
- Collect and compile historical and current data and/or information relative to flooding impacts and climate change in Sonoma County.
- Develop recommended action items for further consideration or implementation.

Permit Sonoma will facilitate collecting historical and current data regarding flooding events will be important to establish baseline metrics. Permit Sonoma will work with partner stakeholders to compile future projections regarding climate change models would help inform the aforementioned advisory group of where and when to anticipate communities at greater risk and in turn how best to allocate resources. For example, communities at higher elevations would be much less likely to experience flooding impacts that those with historical flooding events or those at lower coastal elevations such as the lower Russian River communities or the Bodega Bay and Petaluma communities, respectively.

COORDINATION & PARTNERSHIP



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Developing partnerships is integral to successfully implementing this objective. Permit Sonoma's proposal to develop an advisory group will foster and promote partnerships. Permit Sonoma will also collaborate closely with Sonoma Water as both organizations have related objectives to complete.

This objective intersects with other objectives in other pillars. The Implementation Leads for the related objectives will be invited and encouraged to participate in the advisory group. Their input will be solicited and incorporated into recommended action items. The advisory group will also include cities and community partners.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS

The proposed advisory group would consist of stakeholders from various governmental organizations but may also include members of various community groups. The advisory group will evaluate opportunities to solicit input from the community with tools such as surveys. Outreach efforts must be tailored to facilitate representation of the county's diverse populations. The most current climate change models would be incorporated into the research efforts to better prepare the advisory group with the best available information.

FUNDING

These efforts may be funded by grants sought after by Permit Sonoma's grant writing team or from emergency preparedness funds while any ongoing efforts could be funded by parcel taxes or any available funding from flood protection zone districts. If none of the above funding sources are available and the department may need additional general fund appropriations to complete this work.

This objective is not anticipated to produce any revenue sources and additional staff will be required to complete the work. This objective is estimated to require approximately an additional 0.25 FTE. The extra work could potentially be included with other similar objectives such as RI 5.2, and a new limited term position could share the responsibility of completing both objectives.



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RESILIENT INFRASTRUCTURE

- Goal 5** Support, fund, and expand flood protection.
- Objective 2** Implement land use planning and assessments to address flood protection, including river setbacks and riparian corridors, and make resources available for residents..
- Lead(s)** Alex Rosas, John Mack
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IMPLEMENTATION IDEAS AND PROJECTS

Maintaining, protecting and restoring the extent and quality of natural floodplain and riparian corridors of streams and rivers enhances the protection of structures and life by maintaining natural flood desynchronization, detention, storage, infiltration processes. Natural floodplains and riparian corridors also provide essential ecosystem services and critical habitat for numerous species of plants and animals.

Permit Sonoma will continue to implement the existing Riparian Corridor Ordinance which requires zoning or use permits for most human activity in the currently mapped and regulated riparian corridors in the County. Note that the currently regulated corridors represent a fraction of the County's total stream mileage and is linked to the USGS blue-line streams on the 7.5 minute quadrangle maps. Practically speaking, only larger streams, called "lower order" (e.g. third-order, fourth-order, etc.), streams with watersheds greater than approximately 500 acres are presently protected. Smaller streams, classified as "higher order streams" (zero-, first-, second-order), are unmapped and unprotected.

As part of the General Plan Update, Permit Sonoma will evaluate whether to continue or expand the existing Riparian Corridor Ordinance to reflect lessons learned in the first decade of implementation as well as associated application materials, guidance documents and policies. This will include,

- Applying the results of the improved "top of bank" mapping GIS mapping procedure developed in a pilot project in the Sonoma Valley (previously funded with a US EPA Wetland Program Development Grant). This improved "top of bank" map will result in a more accurately defined Riparian Corridor Combining District Setback map to replace the outdated current map.
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Use latest LIDAR data and other GIS data for the County, to develop a GIS layer which maps all streams in Sonoma County from the top of all watersheds to the ocean or bay (from zero-order to the ocean or bay). This map will form the basis for the policy discussion during the General Plan Update process of whether to extend riparian corridor protections to streams in catchments of less than 500 acres (which represent most of the stream mileage in the County).

METRICS

To Metrics include:

- As part of the General Plan Update, evaluate whether to continue or expand the coverage of the existing Riparian Corridor Ordinance.
- In order to perform that evaluation, develop or obtain more accurate map of all streams in Sonoma County with a more accurately defined riparian corridor setback based on remote estimations of top of bank, such that parcels are correctly included and excluded from the Riparian Corridor Combining District.
- If the outcome of the General Plan policy discussion is to expand the coverage of the Riparian Corridor Ordinance, the increase in the number of stream miles protected and the increase in the acres of riparian corridor protected would be metrics.

COORDINATION & PARTNERSHIP

This objective is closely related to Climate Action and Resiliency goal five, objective one:

By 2025, update the County General Plan and other county/special district planning documents to incorporate policy language and identify areas within the County that have the potential to maximize carbon sequestration and provide opportunities for climate change adaptation. The focus of these actions will be to increase overall landscape and species resiliency, reduce the risk of fire and floods, and address sea level rise and biodiversity loss.

Permit Sonoma will work closely with the Water Agency and Ag + Open Space to coordinate updates to the County's General Plan that will contribute to climate adaptation by expanding riparian corridor protections in the County.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS



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Extensive and healthy floodplains and riparian corridors are critical to overall watershed health and wildfire and climate resiliency. Avoiding and minimizing new development in floodplains and riparian corridors supports and advances all of these benefits to human society and ensures new development will not be placed in landscape positions that put it inherently at risk to natural flood events. Properties in floodplains can have a lower up-front cost than other areas and be home to some of Sonoma County's lowest earners. Creating proper riparian set-backs can avoid new building in high risk areas.

The analysis and policies described in this plan will be included in the General Plan, and be vetted through the General Plan review and public engagement process.

FUNDING

Implementation of the current Riparian Corridor Ordinance permit program takes approximately 1 FTE of staff time per year to review and process permits.

Revision of the ordinance and development of updated guidance and policies is expected to take an additional 0.25 FTE of Senior Environmental Specialist per year for two years. The estimated cost for this FTE is approximately \$90,000 in 2021 and is currently unfunded. Potential sources of funding for this position include the funds allocated for the General Plan Update

Using existing 2013 LIDAR and leverage some GIS mapping layers from the Russian River Regional Monitoring Program (R³MP) process, producing a complete stream map of the County, a top of bank GIS analysis, and a new Riparian Corridor Combining District Zoning Map is expected to cost approximately \$200-400K if contracted to a GIS consulting firm. This is currently unfunded, and potential sources of funding include general funding allocated to the General Plan Update and future grant funding. Recent grant funding obtained by the R³MP will likely produce a complete stream layer for Sonoma County as well as a "top of bank" analysis that could be used. Permit Sonoma is a project collaborator on this work which may be leveraged for County purposes.



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RESILIENT INFRASTRUCTURE

- Goal 5** Support, fund, and expand flood protection.
- Objective 3** Evaluate the feasibility, creation, and/or update of Flood Protection Plans and seek out financing mechanisms to establish protection zones countywide by 2026.
- Lead(s)** Michael Thompson
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IMPLEMENTATION IDEAS AND PROJECTS

Sonoma County contains nine Flood Protection Zones, each encompassing a major watershed. These zones serve as a means of financing the construction and maintenance of flood protection works within Sonoma County. The property owners of each zone have the ability to vote to levee benefit assessments against themselves to fund flood protection projects in their zone. Zones in the Upper Russian River/Alexander Valley watershed (4A), Dry Creek watershed (6A), and Lower Petaluma River/Lower Sonoma Creek (9A) have not elected to levee a benefit assessment to fund flood protection in their regions. There are minimal funding mechanisms for flood protection plans or projects outside of property-owner leveed benefit assessments.

Property-owner support is critical to securing a vote for a benefit assessment. The residents in the Upper Russian River watershed/Alexander Valley (4A) are the only property owners who have indicated interest in pursuing self-taxation to fund flood protection projects. A group of local landowners in Alexander Valley and other Sonoma County agriculture representatives has been formed to evaluate governance options for improving water resource management, including flood control for the Alexander Valley. The Sonoma County Water Agency (Sonoma Water) is also working with this group to explore ways to improve water resource management and achieve ecological uplift in the Alexander Valley. Sonoma Water and District 4 are working together to develop a vision for water resource management in collaboration with County of Sonoma Departments, the Agricultural Preservation and Open Space District and the Sonoma Resource Conservation District (Sonoma RCD). This vision should help guide and coordinate the activities of several organizations governed by members of the County Board of Supervisors



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and other public boards. The County of Sonoma and local landowners are jointly funding a study to assess governance options.

This vision will help inform Sonoma Water's efforts to develop an updated Operations and Maintenance Manual (O&M Manual) for maintaining works of improvement constructed by the U.S. Army Corps of Engineers (Corps) in the Alexander Valley to reduce river channel instability caused by the construction and operation of the Coyote Valley Dam in the 1950s. New models for river management, such as those adopted for the Napa River, could meet Sonoma Water's obligations to the Corps in a manner that provides significant ecological uplift to the Russian River in the Alexander Valley.

METRICS

The goal is to complete the governance study and develop a draft vision for the Alexander Valley in early 2022. An updated O&M Manual will take several years to complete. The goal is to identify maintenance scenarios for Board consideration in early 2022. Once direction is provided by the Board, the necessary engineering and environmental studies will commence and are expected to take 2 years to complete. Additional time will be needed to formally develop the manual and to obtain Corps approval for the updates.

COORDINATION & PARTNERSHIP

Efforts to improve water resource and ecological conditions will be implemented using an adaptive and collaborative approach. Given the complexity of the water resource conditions, such an approach will be necessary to ensure robust stakeholder and natural resource agency involvement, and eventually to gain acceptance of plans to improve water resource and ecological conditions in the Alexander Valley.

Resilient Infrastructure objective 5.3 is closely related to Resilient Infrastructure objective 5.1: *Develop partnerships with cities, tribal governments, and private organizations regarding flood protection and sustainability to identify gaps and address climate change impacts*, and objective 5.2: *Implement land use planning and assessments to address flood protection, including river setbacks and riparian corridors, and make resources available for residents*. The Water Agency and Permit Sonoma will coordinate on stakeholder engagement and project planning to create comprehensive flood control awareness and planning where feasible.

COMMUNITY, EQUITY AND CLIMATE CONSIDERATIONS



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Based on recommendations from Alexander Valley property owners, Sonoma Water is in discussions with the Sonoma Resource Conservation District regarding their involvement in engaging landowners in Alexander Valley. The Sonoma RCD has a long history of working with property owners in this area. Property owner participation will be a critical component in the success of the O&M Manual update. The engagement process developed for this effort can be designed to address equity issues, and to help ensure that implementation of the O&M Manual will not create adverse equity issues in the valley. The effectiveness of the engage process will be evident by the number of landowners that participate in this process and the eventual implementation of the O&M Manual.

One of the goals of the water resource management efforts in the Alexander Valley is to achieve ecological uplift by removing invasive species and improving the health of the riparian corridors on the main stem of the Russian River and its tributaries. Longer-term goals include developing managed aquifer recharge projects for improved drought and flood resiliency. There is the potential to leverage existing funding, private and public landowner funding, and federal natural hazard resiliency funding for these projects. Additional drought resiliency funding that will likely become available in future years could also be leveraged for climate resiliency projects.

FUNDING

Support for ongoing efforts to organize landowners in the Alexander Valley and create an entity to advance water resource management would be funded using private and public sources. Sonoma Water's efforts associated with updating the O&M Manual could be funded through a reestablishment of the Coyote Valley Tax Override. Other collaboration and planning efforts undertaken by public organizations would be funded within existing departmental funding sources.

This effort is also being coordinated with the Russian River Confluence, which is funded through County financial contributions, and public and private in-kind services.

Funding for ongoing water resource management, including flood protection, would be generated with the property-owner leveed benefit assessment.