



SUMMARY REPORT

Agenda Date: 6/2/2020

To: Board of Directors, Sonoma County Water Agency
Department or Agency Name(s): Sonoma County Water Agency
Staff Name and Phone Number: Susanne Oliver 524-1155
Vote Requirement: Majority
Supervisory District(s): Countywide

Title:

Sonoma Water Allocation Change Requests

Recommended Actions:

Adopt a Resolution effective June 2, 2020 to:

Add one (1) full-time equivalent Senior Office Assistant and delete one (1) full-time equivalent Office Assistant II in the Records Management/Clerical Services Section of the Sonoma Water Administrative Services Division to provide a higher level of support; Authorize the conversion of a .75 equivalent Water Agency Senior Technical Writer to a 1.0 full-time equivalent Water Agency Senior Technical Writer allocation in the Technical Writing Section of the Engineering and Resource Planning Division to oversee development of construction project manuals and provide timely technical support; and Add one (1) full-time equivalent Department Information Systems Coordinator and delete one (1) full-time equivalent Department Information Systems Specialist II in the Sonoma Water Computer Instrumentation/Applications Support section of the Water/Wastewater Operations Division to support its asset management system.

Executive Summary:

The level of Sonoma Water's administrative support work has changed in the last years, requiring more specialized knowledge and greater attention to detail along with a more significant consequence of error. To provide this level of support, Sonoma Water requests to replace one Office Assistant II (OA II) allocation with a Senior Office Assistant (SOA) to provide a higher level of support to the organization.

Sonoma Water requests to increase an existing .75 full time equivalent (FTE) Water Agency Senior Technical Writing Specialist to 1.0 FTE. This senior level position is responsible for overseeing development of Sonoma Water's construction project manuals and for keeping emergency construction project work flowing, both of which have seen significant increases in workload due to recent disaster response activity.

Sonoma Water currently uses Maximo, a Maintenance and Asset Management System to track, manage, and maintain assets. Current staffing is insufficient to successfully integrate and manage this critical system. Sonoma Water requests to remove the Department Information Systems Specialist II (DISS II) and add a Department Information Systems Coordinator (DISC) to the Computer Instrumentation/Application Support

group to coordinate the implementation and ongoing administration of Maximo.

The Sonoma County Human Resources Department (County HR) has reviewed this request and concurs with the recommendation.

Discussion:

Senior Office Assistant Add/Delete

The nature of the administrative body of work at Sonoma Water has changed significantly. The work requires the individuals in these positions to format, process and proof Sonoma Water's agenda items submitted to its Board of Directors, as well as process mandated letters, regulatory and technical documents that have statutory requirements and are time-sensitive. Formatting various time-sensitive reports, requests for proposals, and processing water supply agreements are among the other duties. These duties all require constant communication with staff regarding content and also to ensure critical deadlines are met. These tasks and the level of responsibility are more appropriate for the SOA classification than the OA II.

This is a critical request as the clerical support section is currently understaffed due to turnover and retirement of long-standing, full-time personnel. Use of temporary extra help is only a short-term solution as the services the position provides are ongoing. Further, the complexities and responsibilities of the position have grown over time, including learning and assisting staff with new software such as Assetworks, Sonoma Water's fleet management database and OnBase, an electronic record management software. Training is time-consuming and on-going making it better suited for a full-time permanent employee.

The primary duties of the SOA will be the following:

- Format, proof and process board agenda items.
- Format letters, requests for proposals, and reports.
- Obtain senior management signatures and track agreements.
- Upload document images onto an electronic management system.
- Provide support to the front desk and dispatch vehicles to staff.
- Be proficient with the ability to support staff in using Assetworks and On Base.
- Serve as a backup for construction bid process by ordering and distributing specs/plans, setting up bid space, and tracking the time for accepting the bid documents.
- Take meeting notes.

Water Agency Senior Technical Writing Specialist Conversion

Sonoma Water requests to increase the existing .75 FTE Water Agency Senior Technical Writing Specialist Allocation to 1.0 FTE. This senior level position is responsible for overseeing development of Sonoma Water's construction project manuals, which has seen a significant increase in workload; providing technical support to overcome the many challenges of keeping emergency construction project work flowing during a variety of disaster responses (floods, fires, pandemic); and providing assistance to the Technical Writing Manager.

This position has developed into a significant and essential position for Sonoma Water - supporting the Board's strategic priorities, managing risk, and providing essential business services.

The amount of construction project manual work has grown steadily in response to a few factors, including Sonoma Water's success at obtaining grant funding for critical infrastructure projects. Additionally, Sonoma Water is required to build projects in response to regulatory requirements such as the Biological Opinion for Dry Creek and responses to wastewater spills. And, significantly, disasters have created a steady need for emergency projects, which are developed and executed under this position's direction with incredible swiftness.

This position defines and manages risk related to construction projects. The position provides technical support to overcome the many challenges of keeping emergency construction project work flowing during a variety of disaster responses (floods, fires, pandemic). The section's ability to produce project manuals is directly related to the amount of supervision this position is able to provide.

This position change request is a high priority for Sonoma Water because it will provide a significant return on investment for a relatively low cost. The primary job duties are as follows:

- Supervise, lead, and train WA Technical Writing Specialists in development of construction project manuals for critical infrastructure, regulatory, and other Sonoma Water construct projects with significant autonomy and authority.
- Prioritize critical project workloads.
- Comply with dynamic grant-funding requirements
- Generate emergency project contracts swiftly in response to emergencies created by disasters and infrastructure failures.
- Manage risk related to projects.
- Coordinate new procedures swiftly and with little or no assistance in response to disasters (such as bid opening procedures to provide social distancing and increased safety in response to the Coronavirus pandemic).
- Assist Technical Writing Manager in her absence.

Department Information Systems Coordinator Add/Delete

Sonoma Water requests to delete the Department Information Systems Specialist II (DISS II) and add a Department Information Systems Coordinator (DISC) to the Computer Instrumentation/Application Support group to coordinate the implementation and ongoing administration of Maximo.

Sonoma Water currently uses Maximo, a Maintenance and Asset Management System, to track, manage, and maintain assets. Current staffing is insufficient to manage this critical system, and the product has not been fully implemented, nor have business processes or supporting systems been integrated. The system requires significant attention to realize this potential. The ability to plan, schedule, track, record, and predict work; and track the location, disposition, and maintenance lifecycle of assets supports core Agency functions, which directly impact operations and maintenance activities.

The full implementation of Maximo is envisioned to occur in three stages: Planning and Design; Implementation; and Ongoing Support. Planning and design is expected to take 1 to 1.5 years. Implementation will overlap with step one for approximately six months and is expected to extend by approximately 1 year. Ongoing support includes software updates, patches, and maintenance; and ongoing

employee training, documentation updates, and process revisions and improvements.

During the Planning and Design stage the DISC will provide lead worker support to staff conducting an extensive and comprehensive inventory and reconciliation of existing assets, categorizing and cataloging assets, and mapping current process workflows. Staff will enter the assets into Maximo with their related specifications, maintenance schedules, and maintenance procedures. This will involve significant data entry, and the DISC will lead this effort. The DISC will also work with the vendors, consultants, and internal staff to configure the application.

The Implementation phase will include training employees on inventory controls, integrating processes into the application, report design and development, documentation, and training employees and managers on software use. The DISC will need to coordinate development of an inventory control program, train staff on inventory control processes and procedures, develop and offer user training, gather report requirements, and produce reports for operations and management.

On an ongoing basis and for the foreseeable future, the DISC will work with staff performing the day-to-day data entry and routine system administration tasks, and with support from the Business Systems Analyst, monitor data and report integrity, train new employees, create and update documentation, and align software and business processes.

While this work is not required by statute, recent Grand Jury findings (below) directly relate to activities supported by asset management. Knowing what assets Sonoma Water has, where it is, and in what condition, is critical to normal operations, especially during a disaster. Hiring a DISC to oversee Maximo will help address this need by tracking, managing, and reporting data on the location, disposition, maintenance cost, and lifespan of Sonoma Water's assets.

Findings and recommendations from the Sonoma County Civil Grand Jury Final Consolidated Grand Jury Report June 19, 2019 include the following:

- Recommend Sonoma Water maintain inventory lists with current goals for items, quantities, locations, and sourcing; and improve stockpiling accordingly.
- On-going efforts are needed to reduce remaining [earthquake] risks.
- Sonoma Water review and establish viable options for accelerating how rapidly the highest-priority mitigation measures are being funded and implemented.

Sonoma Water's ability to respond during a disaster is primarily a function of preparedness. Sonoma Water cannot be well prepared if it cannot effectively measure both the current state of its assets and available labor hours after required maintenance. Only by understanding the current state can Sonoma Water begin to predict remaining useful life, maintenance labor and materials costs, and begin to predict the extent to which its current resourcing is or is not sufficient for both normal and emergency operations. Sonoma Water needs staff capable of understanding and managing a complex computerized application which reflects its business and derives business value from it.

Maximo is a major computer application supporting core business functions and must be resourced appropriately. The DISC would be primarily responsible for implementation and administration of Maximo, and would work with technical staff and vendors for technical integration, business process design, development, and integration. Maximo requires significant data management, system administration, process

integration, and regular support. The DISC will have the technical expertise to develop a roadmap and coordinate with staff and vendors. Additionally, the DISC will bring significant knowledge, skills, and expertise in computerized system operation, development, maintenance, support, and administration including: data analysis, data management, database management, business process development and analysis, customer service, and supported technical troubleshooting. Maximo requires major development and suffers from data integrity issues, poor process design, poor workflow, low user acceptance and adoption, and other issues. The DISC would have the following primary responsibilities:

- Provide lead worker support to extra-help staff to collect and enter data; oversee the entry of Sonoma Water asset data, and ensure the ongoing quality of that data.
- Develop and maintain computerized application processes and workflows which support asset inventory and lifecycle management.
- Coordinate computerized application upgrade, patching, troubleshooting, and administration.
- Develop and implement a training program to support Maintenance, Operations, Engineering, and Management use of a computerized application.
- Develop and maintain asset performance, asset lifecycle, and Operations and Maintenance labor reports.

Prior Board Actions:

N/A

FISCAL SUMMARY

Expenditures	FY 19-20 Adopted	FY20-21 Projected	FY 21-22 Projected
Budgeted Expenses	\$4,034	\$85,610	\$88,178
Additional Appropriation Requested			
Total Expenditures	\$4,034	\$85,610	\$88,178
Funding Sources			
General Fund/WA GF	\$4,034	\$85,610	\$88,178
State/Federal			
Fees/Other			
Use of Fund Balance			
Contingencies			
Total Sources	\$4,034	\$85,610	\$88,178

Narrative Explanation of Fiscal Impacts:

Salary and benefits are budgeted in the General Fund which is funded through property tax revenue and grants. The General Fund is reimbursed by our enterprise funds through the overhead rate using project

costing. Sonoma Water's cost accounting system allocates labor costs to Sonoma Water projects specific to its enterprise funds.

Adding a 1.0 FTE SOA allocation and deleting 1.0 FTE OA II allocation represents an increase in salary and benefits of \$19,260 in FY 2020/2021 and \$19,838 in FY 2021/2022 assuming a 3% COLA each year. (Calculations are based on weighted rate and a 3% COLA is applied to both FY 2020/2021 and FY 2021/2022 costs.)

Increasing our existing .75 FTE Senior Technical Writer allocation to a 1.0 FTE Senior Technical Writer represents a net increase in the last month of FY 2019/2020 labor costs of \$4,034 (based on a fully loaded annual cost of \$193,606 less the cost of the existing .75 FTE allocation of \$145,205 for an annual increase of \$48,402). For FY 2020/2021 the net increase for salary and benefits will be \$49,854, and \$51,349 for FY 2021/2022 assuming a 3% COLA each year.

The budget adjustment for FY 2019/2020 will be absorbed in the existing budget. FY 2020/2021 and FY 2021/2022 appropriations for these allocation changes will be budgeted in these fiscal years.

Adding a 1.0 FTE DISC allocation and deleting 1.0 FTE DISS II allocation represents an increase in salary and benefits of \$16,496 in FY 2020/2021 and \$16,991 in FY 2021/2022 assuming a 3% COLA each year. (Calculations are based on weighted rate: salary only of \$9,100 X 1.76 = \$16,016. 3% COLA is applied to both FY 20/21 and FY 2021/2022 costs.)

Staffing Impacts:			
Position Title (Payroll Classification)	Monthly Salary Range (A - I Step)	Additions (number)	Deletions (number)
Office Assistant II	\$3280.26 - \$3986.40	0	1
Senior Office Assistant	\$3737.68 - \$4541.23	1	0
WA Senior Technical Writing Specialist	\$7130.00 - \$8666.77	.25	0
Department Information Systems Specialist II	\$6560.51 - \$7974.54	0	1
Department Information Systems Coordinator	\$7183.17 - \$8732.86	1	0

Narrative Explanation of Staffing Impacts (If Required):

If approved, this request will change Sonoma Water's allocation tables as follows:

Office Assistant II allocations will decrease from 2 to 1

Senior Office Assistant will increase from 4 to 5

Water Agency Senior Technical Writing Specialist will increase from 1.75 to 2.0

Department Information Systems Specialist II will decrease from 3 to 2

Department Information Systems Coordinator will increase from 0 to 1

Agenda Date: 6/2/2020

Attachments:

(1) Resolution

Related Items “On File” with the Clerk of the Board:

None