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**Project Finance  
Advisory, Ltd.**

# Memo

|            |                                                                                    |              |                                 |
|------------|------------------------------------------------------------------------------------|--------------|---------------------------------|
| <b>To:</b> | Keith Lew & Toni Holland<br>General Services Department<br>County of Sonoma        | <b>From:</b> | Victoria Taylor,<br>David Gloss |
| <b>Re:</b> | Program Validation Summary<br>Report<br><br>New Sonoma County<br>Government Center | <b>Date</b>  | November 30, 2020               |

## Contents:

- I. Executive Summary
- II. Introduction
- III. Program Validation Process
- IV. Findings
- V. Summary and Conclusions
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### I. Executive Summary:

The purpose of the Program Validation phase of the Technical Advisor's work was to: (1) verify the results of the previous programming work that had been performed for the County, and (2) make a determination on the space requirements of all County Departments in the new County Government Center.

The Program Validation phase of the Technical Advisor's work took place primarily from September through November in 2019, but figures supporting the outcomes of those process were revisited in May and June of 2020. The recommendations in this memo include updates for the COVID-19 global pandemic and the potential impact space standards, remote working and other considerations.

Following the Technical Advisor's engagement with Department heads, analysis was performed to identify the adjacencies between different departments for the



purpose of identifying how proximity helps each department meet their primary functions and provide service to their client bases.

The Technical Advisor's analysis considered the Departments' physical size requirements, adjacency benefits, growth expectations and drivers, physical location benefits, and square footage per Full Time Employee ("FTE").

The analysis supports a recommendation to size the building program for the County Government Center to accommodate 2,443 staff at 225 square feet per person. A reduced space standard of 170 square feet per person can also be considered by the County to achieve desired affordability limits, with continued remote work (telework) for a portion of the workforce.

## **II. Introduction:**

The Technical Advisor and staff engaged Departments to validate information gathered previously during the Comprehensive County Facilities Plan (CCFP) accepted by your Board in 2013. The CCFP provided as part of a greater product an in-depth analysis of departmental functions and documented required internal and interdepartmental adjacencies and required square footage for departments to function and interact with the public and other departments more effectively. The CCFP represented departmental needs at a specific point in time with limited growth projections. Since several years had elapsed since the completion of the CCFP, the task for the Technical Advisor was to validate the findings to document any changes in requirements. This validation process included surveying departments to ensure that staffing projections and existing headcounts were accurate, and that unique needs for specialized spaces were captured. Numerous workshops and one on one discussions were held with the Department and Agency directors to review and confirm these program requirements.

During these conversations Department heads echoed the Board's concerns and goals including: operating costs, the convenience of services for the public, and employee considerations such as access to parking and transit alternatives.

PFAL determined the updated program requirements of each department with some departmental changes in mission and growth. Appendix B is a Summary of the Program Validation effort.

The Technical Advisor initiated the Program Validation work early in the overall technical process following the confirmation of County goals and objectives. Site analysis was undertaken after the program was established. Once a preferred site was identified, the financial analysis was performed on that program and site to identify an optimal procurement option. The end-result of all steps in aggregate includes a recommendation to the Board of Supervisors regarding next steps.



### Goals of Program Validation

The intent of the Program Validation process was to understand and validate the following:

- Identify interdepartmental relationships that are key/critical to deliver services
- Identify essential services/requirements for location resiliency and electricity support based on department head recommendations
- Employee working practices for getting to work or working remotely to understand transit and parking needs
- Desired customer service goals and preferred physical location for the future based on department head recommendations
- How physical layout and location helps or hinders departments in providing optimal services so as not to disrupt existing services or create new inefficiencies
- Identify each department's primary customer base
- How customer access to services could be enhanced based on department head observations and recommendations (e.g. one-stop-shop or consolidation)
- If co-location with the City of Santa Rosa would be beneficial for employees and customers
- Current space capacity of departments, employee headcount growth rates, drivers of growth
- Current office size and location of existing departmental facilities
- Lessons learned from recent extreme events (e.g. fires and flooding)
- Provide comprehensive staff engagement opportunity for feedback/input

### **III. The Program Validation Process:**

The Program Validation process included the following steps:

- Kick-off meeting with project team (August 2019)
- Review previous studies (i.e. Gensler and Kitchell)
- Individual meetings with all Sonoma County Supervisors
- Survey of Department Heads or their representatives (25 respondents)
- Listening sessions with labor representatives
- Workshops with Department Heads or their representatives (10 two-hour workshops)
- County facilities site tour to meet with certain representatives to review existing conditions
- Energy and sustainability site tour with Santa Rosa Junior College
- Updates to Department Agency Head Association ("DAHA") and Steering Group
- Discussions and updates with the City of Santa Rosa
- Department headcount trends (i.e. growth rates)
- Employee zip code home locations assessment

Department Adjacencies were confirmed or revised based on a study of departmental structures, core business functions, customers and critical adjacencies. See Appendix A for summary of department interdependencies. Divisions within Sonoma County have been organized into planning components taking into consideration department functions and interdependencies.

There are five main engagement groups, Justice/Courts, Administration, Social, Agricultural, and Emergency Management, as shown below:



Departments included in each group are as follows:

|                      |                                                                                                                                                                                                                                                                                                                            |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.<br>Justice/Courts | District Attorney<br>Hall of Justice<br>Independent Office of Law Enforcement Review and Outreach<br>Law Library<br>Law Office of the Public Defender<br>Main Adult Detention Facility<br>Public Defender<br>Probation Adult Services<br>Sheriff<br>State Superior Court House<br>Sonoma County Superior Court             |
| 2.<br>Administration | Auditor, Controller, Treasurer, Tax Collector<br>County Clerk, Recorder, Assessor, Registrar of Voters<br>County Administrators Office (CAO), Board of Supervisors County Counsel<br>Human Resources<br>Information Systems<br>Office of Resilience & Recovery Permit Sonoma/Fire & Emergency Services<br>General Services |

|                         |                                                                                                                                                                                                                                                                                                                                             |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                         | Sonoma County Airport<br>Sonoma County Employees Retirement Association<br>Transportation & Public Works Administration<br>Water Agency<br>Community Development Commission<br>Economic Development Commission<br>Health Services Administration<br>Sonoma County Transportation Authority<br>The Local Agency Formation Commission (LAFCO) |
| 3. Social               | Health Services, Animal Services<br>Child Support Services<br>Health Services Emergency Medical Services<br>Human Services<br>Behavioral Health Services<br>Health Services Environmental Health & Safety<br>Public Health Administration & Disease Control                                                                                 |
| 4. Agricultural         | Agricultural Division / Weights & Measures<br>UC Cooperative Extension<br>Agriculture & Open Space<br>Regional Parks Administration                                                                                                                                                                                                         |
| 5. Emergency Management | Emergency Management                                                                                                                                                                                                                                                                                                                        |

Justice/Courts group:

1. Engagement group is predominantly located at the existing Government Center.
2. There are very strong internal links within this engagement group.
3. Five elements within this group will not be moving:
  - a) State Superior Court
  - b) Main Adult Detention Facility
  - c) Family Justice Center
  - d) Sheriff's Office
  - e) Sheriff's Evidence Facility
4. The state is constructing a new court facility at this location, which creates a limit to this group's opportunities to relocate.
5. There are strong external collaboration links with two engagement groups, both of which are located at other sites.
  - a) Timely service delivery to the public of these external collaborations would be improved by closer proximity (e.g. Safety net).
  - b) With the court, detention facility and Sheriff's office etc. not relocating, this closer proximity can only be achieved by locating at the existing Government Center site.



### Administration

1. This engagement group is located primarily at the existing Government Center, there is still considerable geographic spread of department locations.
2. There are very strong internal links between the Departments that are located at the existing Government Center.
3. There are strong external collaboration links both to departments at the Government Center as well as those located elsewhere e.g. with the Social engagement groups Human Services at the airport and the Behavioral Health Services at the west side.
4. Service delivery to the public would be improved by closer proximity.

### Social

1. This engagement group is dispersed across two primary locations, the airport and the west side, with other departments located close to downtown or Chanate.
2. There are strong internal links between the departments within this engagement group, but this is not reflected by their geographic locations.
3. There are strong external collaboration links to departments located elsewhere e.g. with the Justice/Courts group at the Government Center and with Administration groups located both at the Government Center and at locations elsewhere.
4. Service delivery to the public would be improved by closer proximity between departments both within the Social engagement group as well as with departments within the Justice/Courts engagement group.

### Agricultural

1. The smallest of the engagement groups agriculture is primarily located at the airport area, with one department located at the existing Government Center and another near downtown.
2. The major external collaboration link is with the County Counsel.
3. The program requirements of at least three of the departments, relating to large vehicle and trailer access, animal care and location of population being served are specific enough that their current location at the airport area suits their needs in ways that other sites would not.
4. To the extent that the Agriculture engagement group interacts with the public at their site (as opposed to in the field) the majority of their clients are located to the north and west making their current location very user friendly.
5. Beyond work with the County Counsel, this engagement group does not have strong collaboration links with departments located at the other sites.

### Emergency Management

1. Service delivery needs and recent experience highlight the need for a comprehensive, consolidated and independent Emergency Operations Center (EOC).



2. EOC has unique and significant space, access and warehousing requirements.
3. Resiliency and redundancy of systems suggest that a location remote to the existing Government Center is optimal.
4. Essential departmental functions are “triggered” when the EOC is activated.

#### **IV. Findings:**

In addition to the above studies, prior work performed in 2019 and early 2020 support the following findings. These items included the Department Heads meetings conducted in February 2020 and Service Delivery Plan Questionnaire of Department Heads (August 2019).

The Program Validation process had the following findings:

1. A significant need and support for the new project with strong rationale to support staffing/customer needs
2. A significant opportunity to consolidate department services (both administrative and customer facing) to improve efficiency and enhance customer services
3. Not all departments should be consolidated in one site location due to specific and unique needs and services of different departments; and neighborhood services in the community are to remain
4. Certain departments need to be adjacent to others (refer to graphics shown separately) to enhance service delivery
5. Limited opportunity for new satellite locations
6. Limited suitability for significant County departmental presence in downtown Santa Rosa from an employee and customer perspective
7. Resiliency of operations for certain essential services is critical for disaster events and planned power shutdowns, in particular a comprehensive and independent Emergency Operations Center
8. Significant need for meeting/conference/training rooms
9. Certain departments have unique security, privacy, storage and fleet vehicle parking requirements
10. Significant employee and customer parking is needed and it is important to have access to transit options for employees and customers, in particular

The above findings were considered in the context of departmental and staffing adjacency needs. This allowed the County to determine, in coordination with Department heads, which FTE counts would be included in the New County Government Center. The consolidated results of the Staff Survey Count and Projections have been summarized in Appendix B, for a total of 2,443 Full-time-equivalent (FTE) employees moving to the new County Government Center with a preferred space standard of 225 square feet per FTE. See Appendix B for detail by department.



The following steps occurred in subsequent technical analysis process, based on program validation findings including:

- County confirmation of key assumptions (sq. ft. per person, growth rates etc.)
- Site program options (square footage, parking etc.)
- Site options analysis
- Site evaluation and ranking workshop (est. February 3, 2020)
- Incorporate feedback from stakeholder and employee/resident engagement
- Conclusions and recommendations on site analysis (timing and schedule)

#### Program Validation Updates:

In June 2020, the Program Validation Process was revisited to consider impacts of remote working by County employees, following the COVID-19 global pandemic, which included Shelter in Place orders in March 2020. The shelter in Place orders resulted in approximately 30% of County employees working remotely. A countywide employee survey was conducted to revalidate the Program Validation process and the outcomes of that have been included in the figures shown in the appendices.

#### **V. Summary & Conclusions:**

The Program Validation process led to the following conclusions, which includes department adjacencies confirmed as noted above:

- Administrative Functions can be consolidated to a new County Center
- Most Health & Social Support Services can be consolidated to a new County Center
- Departments interacting with agricultural or rural concerns are better suited to remain as a type of neighborhood service where they are currently located

The estimated FTE count for the new County Government Center is 2,443.

It is thus recommended to size building program to accommodate 2,443 staff with 2% expansion:

- Return to your Board with a recommendation for Space Standard adjustment after consultation with Labor, and
- Additionally, consider Remote Working (Telework) scenarios in financial scenario analysis for feasibility and affordability, including various square footage per employees (e.g. 170 square feet per FTE, and 225 square foot per FTE).

#### **The above steps are further considered in subsequent Financial Analysis report.**

#### **PFAL Recommendations to the County:**

Based on findings of the PFAL Technical Advisory team and with guidance from the Steering committee, PFAL recommends the following:

- Program Validation: Accept Program Validation findings that adjust the Comprehensive County Facilities Plan (CCFP)





**VI. Appendices:**

Appendix A: Department Interdependencies

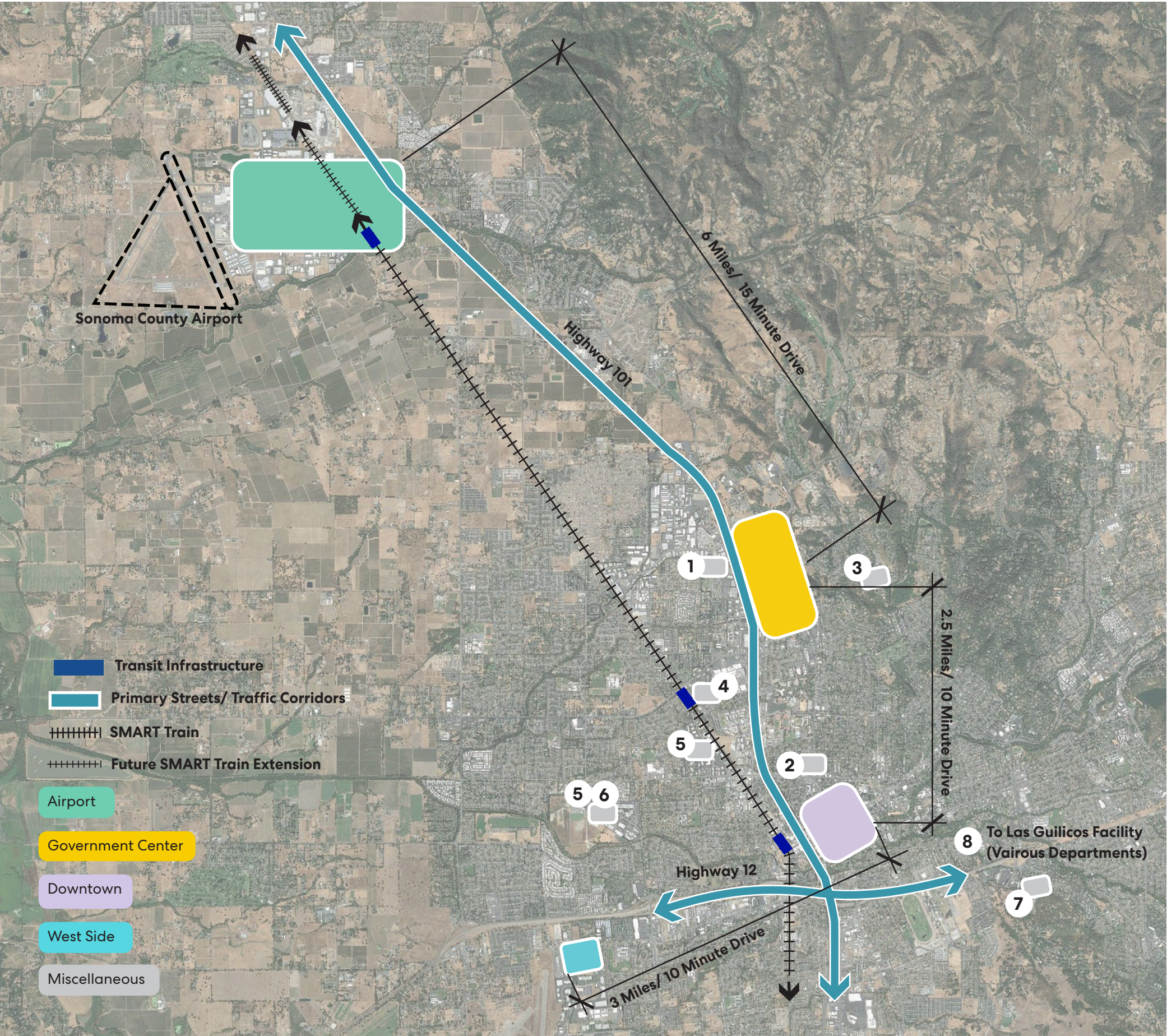
Appendix B: Program Validation Summary Table



## **Appendix A: Department Interdependencies**



EXISTING COUNTY DEPARTMENT LOCATIONS



JUSTICE / COURTS

- District Attorney
- Hall of Justice
- Independent Office of Law Enforcement Review and Outreach
- Law Library
- Law Office of the Public Defender
- Main Adult Detention Facility
- Public Defender
- Probation Adult Services
- Sheriff
- State Superior Court House
- Sonoma County Superior Court 1

AGRICULTURE

- Agricultural Division/Weights & Measures
- UC Cooperative Extention
- Agriculture & Open Space 2
- Regional Parks Administration

SOCIAL

- Health Services, Animal Services
- Child Support Services
- Health Services Emergency Medical Services
- Human Services
- Behavioral Health Services
- Health Services Environmental Health & Safety
- Public Health Admininstration & Disease Control 3

ADMINISTRATION

- Auditor, Controller, Treasurer, Tax Collector
- County Clerk, Recorder, Assessor, Registrar of Voters
- County Administrators Office (CAO), Board of Supervisors
- County Counsel
- Human Resources
- Information Systems
- Office of Resilience & Recovery
- Permit Sonoma/ Fire & Emergency Services
- General Services
- Sonoma County Airport
- Sonoma County Employees Retirement Association
- Transportation & Public Works Administration
- Water Agency
- Community Development Commission 4
- Economic Development Commission 6
- Health Services Aministration 7
- Sonoma County Transportation Authority
- The Local Agency Formation Commission (LAFCO)
- Emergency Management 5
- Las Guilicos Facility (Various Departments) 8

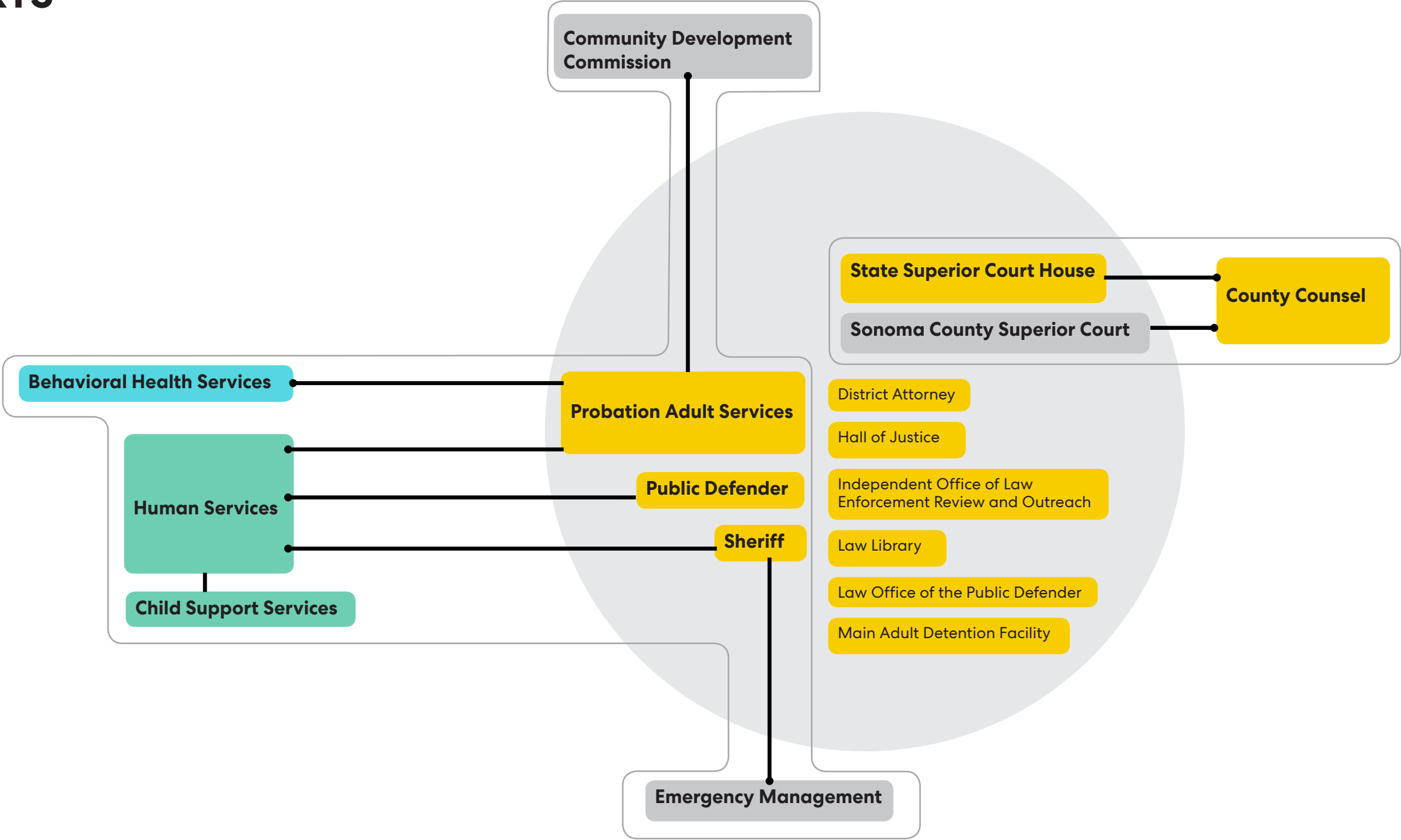




JUSTICE / COURTS

LEGEND

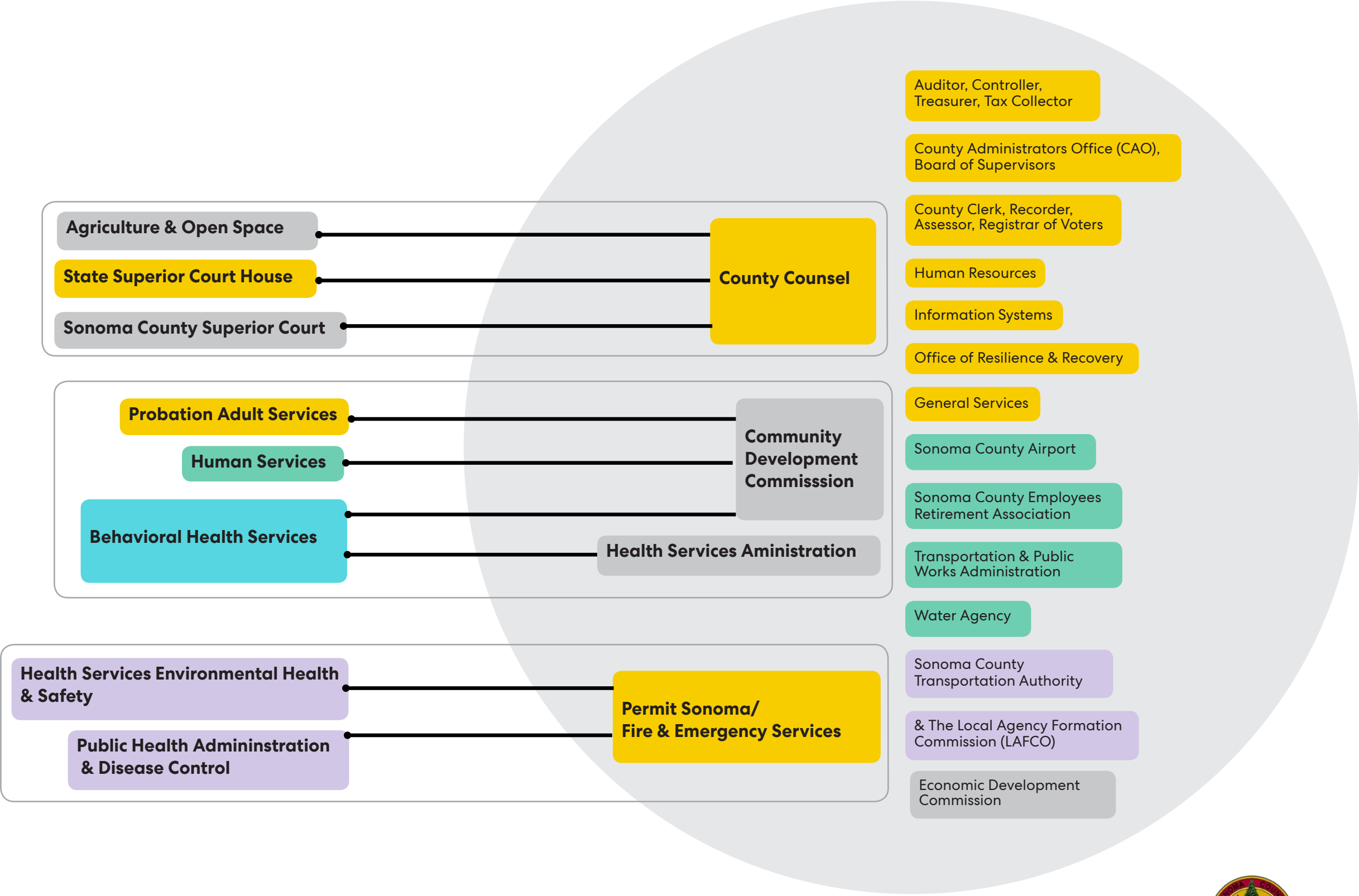
- Airport
- Government Center
- Downtown
- West Side
- Miscellaneous
- Engagement Group
- Departments with External Collaboration



ADMINISTRATION

LEGEND

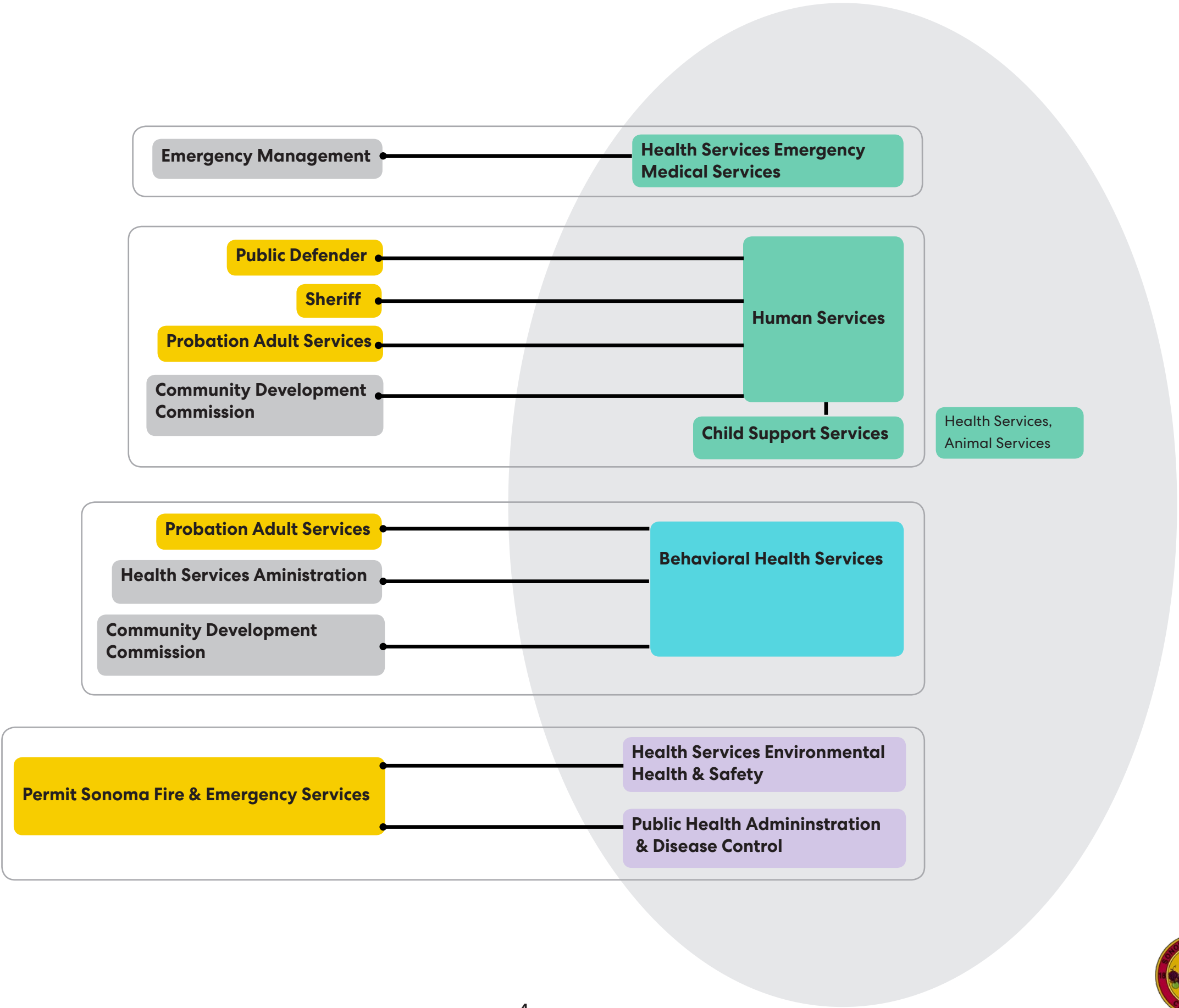
- Airport
- Government Center
- Downtown
- West Side
- Miscellaneous
- Engagement Group
- Departments with External Collaboration



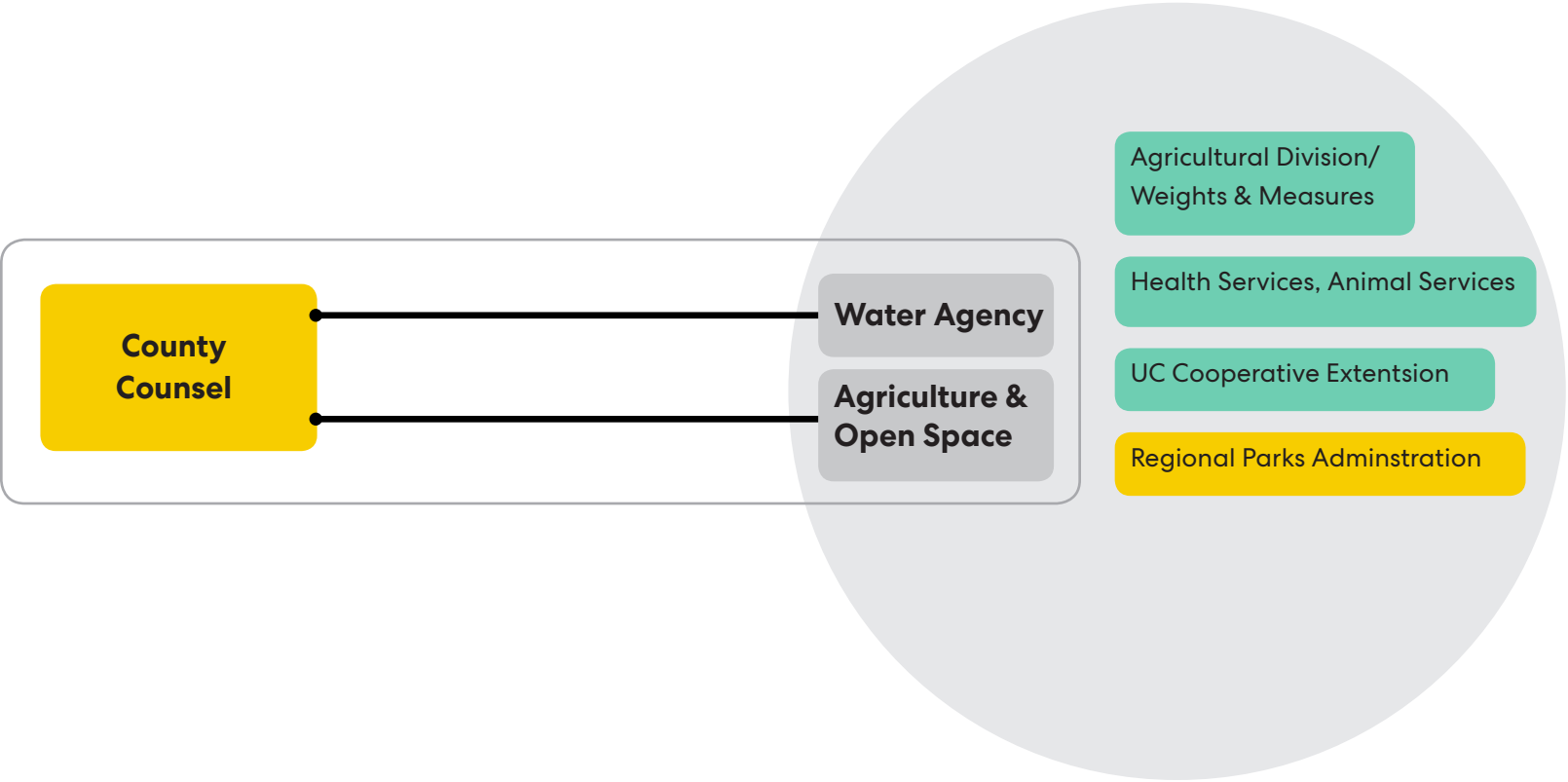
SOCIAL

LEGEND

- Airport
- Government Center
- Downtown
- West Side
- Miscellaneous
- Engagement Group
- Departments with External Collaboration



AGRICULTURAL



LEGEND

- Airport
- Government Center
- Downtown
- West Side
- Miscellaneous
- Engagement Group
- Departments with External Collaboration



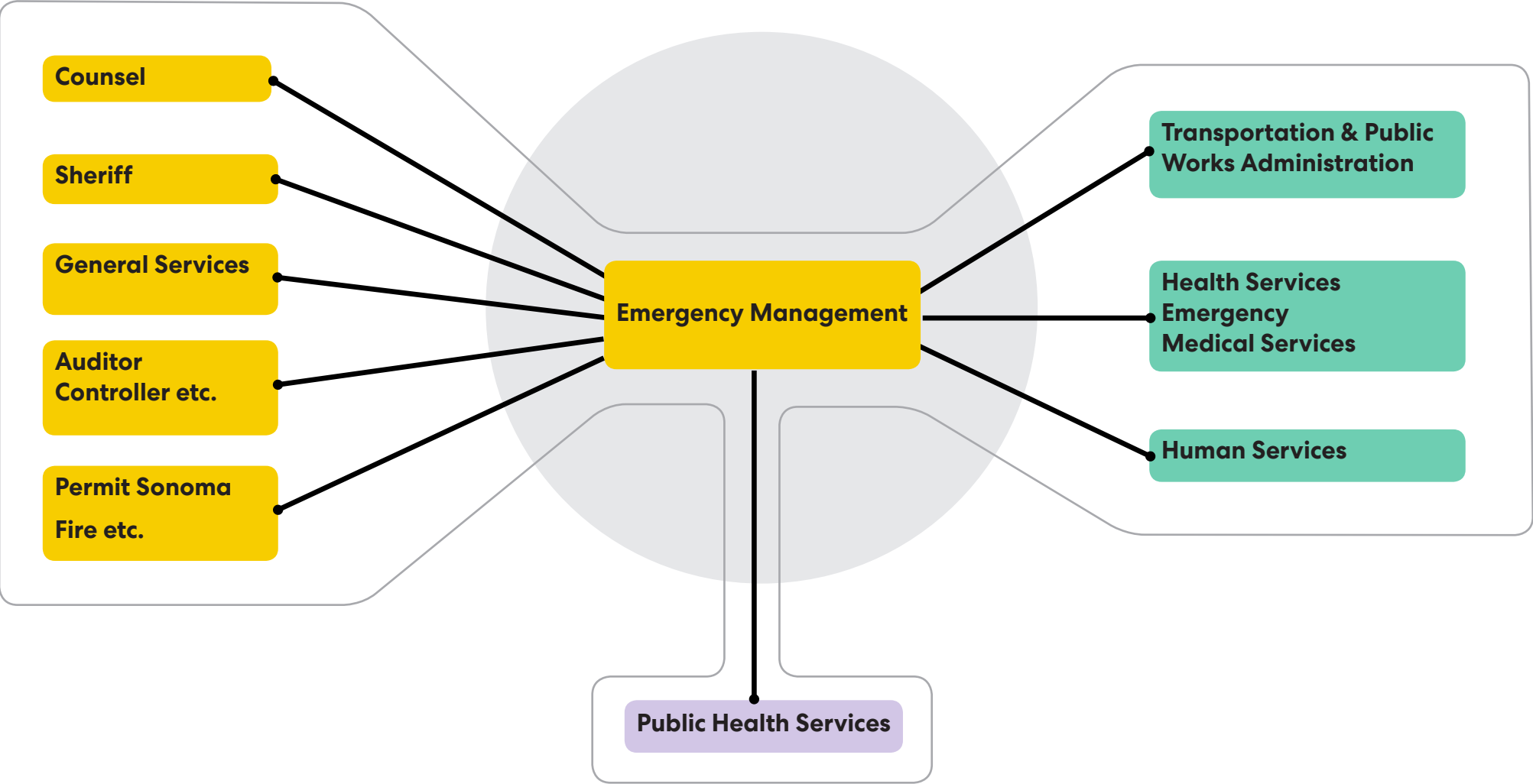
# EMERGENCY MANAGEMENT

## LEGEND

- Airport
- Government Center
- Downtown
- West Side
- Miscellaneous



—●— Departments with External Collaboration







## **Appendix B: Program Validation Summary Table**

Program  
requirements  
of each  
department  
were updated

| Department                                                | Total FTE's | FTE<br>Moving to<br>New CGC | FTE Not<br>Moving to<br>New CGC |
|-----------------------------------------------------------|-------------|-----------------------------|---------------------------------|
| Agricultural Preservation & Open Space District           | 23          | 0                           | 23                              |
| Agriculture/Weights & Measures                            | 37          | 0                           | 37                              |
| Auditor Control Treasurer Tax Collector                   | 102         | 90                          | 12                              |
| Board of Supervisors                                      | 23          | 23                          | 0                               |
| Clerk Recorder Assessor Registrar of Voters               | 123         | 123                         | 0                               |
| Community Development Commission                          | 46          | 46                          | 0                               |
| County Administration Office                              | 27          | 23                          | 4                               |
| County Counsel                                            | 43          | 43                          | 0                               |
| Department of Child Support Services                      | 78          | 78                          | 0                               |
| Department of Emergency Management                        | 14          | 14                          | 0                               |
| Department of Health Services                             | 558         | 272                         | 286                             |
| District Attorney Office                                  | 133         | 130                         | 3                               |
| Economic Development Board                                | 14          | 14                          | 0                               |
| Fairgrounds                                               | 25          | 0                           | 25                              |
| General Services                                          | 101         | 81                          | 20                              |
| Human Resources                                           | 62          | 58                          | 4                               |
| Human Services Department                                 | 919         | 813                         | 106                             |
| Independent Office of Law Enforcement Review and Outreach | 5           | 5                           | 0                               |
| Information Systems Department                            | 117         | 117                         | 0                               |
| Law Library                                               | 2           | 2                           | 0                               |
| North Coast Railroad Authority                            | 2           | 0                           | 2                               |
| North Sonoma County Air Pollution Control District        | 6           | 0                           | 6                               |
| Permit Resource Management                                | 152         | 152                         | 0                               |
| Probation                                                 | 300         | 166                         | 134                             |
| Public Defender                                           | 52          | 48                          | 4                               |
| Regional Parks                                            | 123         | 54                          | 69                              |
| Sheriff                                                   | 635         | 12                          | 623                             |
| Sonoma County Employees Retirement Association            | 13          | 0                           | 13                              |
| Sonoma County Transportation Authority                    | 16          | 16                          | 0                               |
| Transportation and Public Works                           | 167         | 61                          | 106                             |
| UCC Cooperative Extension                                 | 15          | 0                           | 15                              |
| U.S. Congressman Thompson's office                        | 2           | 2                           | 0                               |
| Water Agency                                              | 220         | 0                           | 220                             |
| <b>FTE's Total</b>                                        | <b>4155</b> | <b>2443</b>                 | <b>1712</b>                     |

# Program Validation