

# ➤ QUALIFICATIONS FOR EXECUTIVE DIRECTOR SERVICES

For the Santa Ynez Basin Eastern Management Area  
Groundwater Sustainability Agency

August 9, 2024

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August 9, 2024

Dear Selection Panel Members,

The Hallmark Group enthusiastically presents our qualifications for Executive Director Services for the Santa Ynez Basin Eastern Management Area Groundwater Sustainability Agency (EMA GSA). Our qualifications provide an approach tailored to meet the unique needs of the EMA GSA and exceed all requirements outlined in the Request for Qualifications. **Our team's expertise in administration and water resources management have benefitted many State Water Projects, Central Valley Projects, and groundwater sustainability agencies throughout California, including the Cuyama Basin Groundwater Sustainability Agency, Eastside Water Management Area, County of San Luis Obispo, Chino Basin Watermaster, and other relevant programs as detailed in this qualifications package. Additionally, the EMA GSA can draw technical expertise as needed from our staff with decades of experience serving as general managers of the largest water agencies in the state.**

You will find that we have arrayed an immensely talented team specifically selected to serve as Executive Director and ensure smooth transition to management of overall administration, project implementation, communication and coordination, financial management, and public engagement activities.

We thank you for the opportunity to propose on such an important project and we look forward to supporting you.

Please contact me below should you have any questions.



Best regards,

A handwritten signature in blue ink that reads "Charles R. Gardner, Jr." in a cursive script.

Charles R. Gardner, Jr.  
President and CEO of Hallmark Group

#### **HALLMARK GROUP GENERAL FIRM INFORMATION**

CONTACT PERSON	Charles R. Gardner, Jr.
MAILING & PHYSICAL ADDRESS	500 Capitol Mall, Suite 2350, Sacramento, CA 95814
LOCAL OFFICE	4900 California Avenue, Tower B Second Floor, Bakersfield, CA 93309
YEARS IN BUSINESS	Founded in 2001, 23 years in business
NUMBER OF EMPLOYEES	15
EMAIL ADDRESS	cgardner@hgcpm.com
CONTACT TELEPHONE	(916) 708-8767
FIRM TELEPHONE	(916) 923-1500
SBE/DVBE	Yes
FIRM WEBSITE	www.hgcpm.com

## APPLICABLE EXPERIENCE

Based upon our experience and qualifications, the Hallmark Group is best suited to provide the Executive Director Services requested by the EMA GSA because of our:

- ✓ **Technical knowledge to support the EMA GSA as an Executive Director and representative**
- ✓ **Understanding of operations and management of Groundwater Sustainability Agencies**
- ✓ **In-depth experience with regional water resources management and stakeholders**
- ✓ **Sustainable Groundwater Management Act (SGMA) and project implementation management experience for public agencies**

**Hallmark Group Capital Program Management** has been an established provider of program management services for over 20 years since its founding in 2001 further focusing our expertise on water resources management and development. Excelling in the leadership and management of complex programs for both government and private clients, our areas of focus include water resources management, administration, new water development, supply modeling, funding, risk management, project controls, organizational development, strategic implementation, environmental planning management, design and engineering management, and construction management.

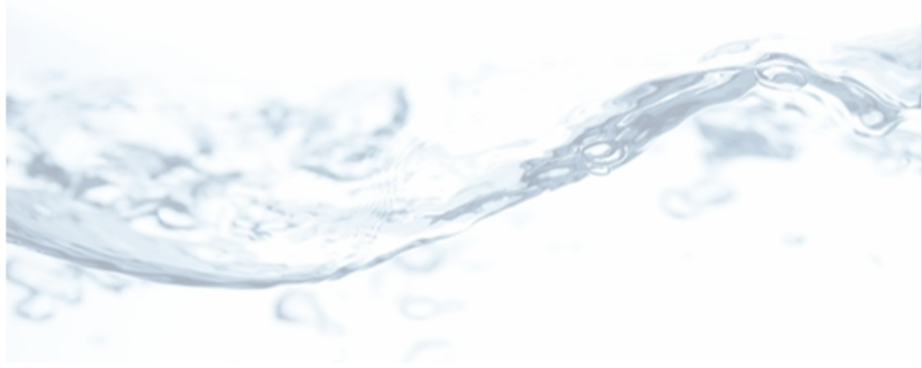
With decades of experience in California water resource issues Hallmark Group has planned, managed, and held long-standing strategic and implementation positions for public agencies throughout the state.

Our team's expertise in water resources management and administration has been honed by a demonstrated record of success in program management for public agencies serving as the owner's representative. The team has held leadership roles for large California water agencies and are uniquely familiar with the needs of the EMA GSA as related to the proposed scope. Our demonstrated program management capability, and history of relationships within California water management, make our team exceptionally qualified to fulfill this role.

The programs that follow are representative of the capabilities the Hallmark Group can provide for the EMA GSA. In addition to being fully compliant qualifications requirements, our team's experience clearly demonstrates that our team offers the following benefits:

- **Experience in both program and agency management**
- **Relevant programs of similar scope to Executive Director Services for the EMA GSA**
- **A nimble approach to task implementation and staffing that focuses on obtaining results quickly and efficiently**
- **Experience serving in a similar capacity with public agencies**

## Representative Projects Demonstrating Project Scope Experience in Executive Director Services for the EMA GSA



	CUYAMA BASIN GSA EXECUTIVE DIRECTOR	EASTSIDE WATER MANAGEMENT AREA EXECUTIVE DIRECTOR	COUNTY OF SAN LUIS OBISPO SGMA & ADMINISTRATIVE SUPPORT	CHINO BASIN WATERMASTER
Perform administrative and management duties in the capacity of Executive Director for a public agency acting as a GSA.	●	●	●	●
Oversee implementation of approved Groundwater Sustainability Plan and Projects, coordinated within Basin.	●	●	●	●
Public meeting management including Board, Committee, and Public Advisory sessions.	●	●	●	●
Coordinate and manage consultants retained by the GSA, including legal counsel and technical consultants.	●	●	●	●
Serve as or work with the Treasurer of the GSA providing financial information to GSA Boards.	●	●	●	●
Secure other services needed by the GSA, such as insurance, bookkeeping, Certified Public Accountant, and web-hosting.	●	●	●	●
Serve as the GSA point of contact, communicating with stakeholders, landowners, groundwater producers, staff representing GSA member agencies, and other interested parties.	●	●	●	●
Facilitate regular meetings with member staff representatives.	●	●	●	●
Participate in basin-wide staff and board meetings.	●	●	●	●

**EXECUTIVE DIRECTOR AND ADMINISTRATIVE SERVICES  
CUYAMA BASIN GROUNDWATER SUSTAINABILITY AGENCY (2017-PRESENT)**

Hallmark Group was retained by the Cuyama Basin Groundwater Sustainability Agency (CBGSA) to provide support services to the agency, including all Board of Directors reporting and facilitation, project controls, financial management, budget development and tracking, schedule management, consultant management, contract management, public outreach, and coordination of grant administration and reporting. The CBGSA was formed in 2017 pursuant to the Groundwater Sustainability Act (SGMA) to develop and implement the Cuyama Basin Groundwater Sustainability Plan (GSP). The CBGSA is governed by an 11-member Board of Directors and includes representatives from the four counties that intersect the Basin (Kern, Santa Barbara, San Luis Obispo, and Ventura), the Cuyama Community Services District, and the Cuyama Basin Water District.




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**SCOPE** Hallmark Group provides the Groundwater Sustainability Agency Executive Director Services. Activities include Board reporting and facilitation, project controls, fiscal management services, meter requirement implementation, budget development and tracking, groundwater extraction fees implementation, groundwater allocation implementation, schedule management, consultant management, contract management, stakeholder outreach facilitation, website updates, and coordination of grant administration and reporting.

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**OUTCOME** All GSA objectives are being met. The Hallmark team has managed the development of the Groundwater Sustainability Plan which has been approved by the California Department of Water Resources. The team continues to manage the GSP implementation effort and has done so on budget and on time. Within a short timeframe the Hallmark team managed the proposal review and selection of key consultants for the program, developed annual and program budgets, developed and facilitated negotiations for program cost allocation among participants, developed the program schedule, and implemented executive level Board reporting. The team also established processes, procedures, and policies for newly created organizations in a timely and affordable manner. Ongoing project implementation is currently in progress and tracking the goal of achieving groundwater sustainability by 2040.

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**CONTACT** Cory Bantilan, Board Chair      cory.bantilan@countyofsb.org      (805) 680-2226  
Key Team Members: Taylor Blakslee, Jacqueline Harris, Grace Bianchi

## EXECUTIVE DIRECTOR AND ADMINISTRATIVE SERVICES EASTSIDE WATER MANAGEMENT AREA (2018-PRESENT)

The Eastside Water Management Area (EWMA) is comprised of forty-six landowners with over 38,000 acres. The EWMA is a non-profit organization governed by a 7-member Board and is an associate member of the Kern Non-District Land Authority Groundwater Sustainability Agency (KNDLA). The EWMA’s primary purpose is to comply with the regulations and requirements of SGMA.



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**SCOPE** Hallmark Group provides Executive Director Services to the EWMA. Hallmark Group guided the formation of the EWMA which currently has 46 members who own approximately 38,000 acres. The services provided by Hallmark Group include budget development, administration, project controls, schedule management, contract management, outreach, facilitation of Board of Directors meetings, and coordination with the Kern Non-District Land Authority.

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**OUTCOME** All GSA objectives are being met. Hallmark Group oversaw the development of Groundwater Sustainability Plan (GSP) and is working with basin stakeholders to amend the GSP. The Hallmark Group provides effective management and representation at the Kern Non-District Land Authority GSA and basin coordination meetings. The team’s in-depth policy experience has guided technical groundwater management strategies and our years of administrative support provide successful coordination with neighboring water districts on water management strategies. Ongoing project implementation is currently in progress and on track to achieving the goal of groundwater sustainability by 2040.

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**CONTACT** Chad Hathaway, Board Chair      chathaway@hathawayllc.com      (661) 201-7716  
Key Team Members: Taylor Blakslee, Grace Bianchi

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## SUSTAINABLE GROUNDWATER MANAGEMENT ACT SUPPORT & ADMINISTRATIVE SERVICES COUNTY OF SAN LUIS OBISPO (2022-PRESENT)

The County of San Luis Obispo Groundwater Sustainability Department (GSD) is responsible for implementing the goals and policies of the County to achieve sustainability within the managed groundwater basins in accordance with the requirements of applicable laws and regulations, including the Sustainable Groundwater Management Act (SGMA), for the benefit of all groundwater users in the County. The GSD serves as the primary point of contact for the County for two (2) Groundwater Sustainability Agencies (GSAs), including the Paso Robles Basin GSA and the San Luis Obispo Valley GSA and as a partner on other management committees in the six (6) managed groundwater basins within the county. The GSD County staff available to provide the required services is limited and therefore the GSD selected Hallmark Group to provide an extension of staff to support efforts to achieve sustainability within the managed groundwater basins.




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**SCOPE** Hallmark Group provides management and administrative support to the GSD including preparation of SGMA policy and compliance strategy updates for the Board of Supervisor (BOS) and coordinating Fair Political Practices Commission (FPPC) filings for both the County GSAs and the basin management committees. Hallmark Group also conducts general administration tasks such as outreach efforts during the GSP implementation phases, meeting preparation and facilitation, stakeholder coordination, budget development, and grant funding and administration.

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**OUTCOME** Project objectives are being met. Hallmark Group has successfully transitioned services from County staff and has alleviated resource constraints. The Hallmark team is a reliable partner and project implementation is currently in progress and tracking the goal of achieving groundwater sustainability by 2040. The Hallmark Group provides effective management of basin objectives at the direction of the County. The team’s in-depth SGMA expertise has guided GSP implementation efforts, while our years of administrative support provide successful coordination within the County and the GSAs they serve.

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**CONTACT** Blaine Reely, Director of Groundwater Sustainability      breely@co.slo.ca.us      (805) 280-1051  
Key Team Members: Taylor Blakslee, Grace Bianchi

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**GENERAL MANAGER  
CHINO BASIN WATERMASTER (2012-2023)**

After years of negotiations and studies by concerned producers in the Chino Basin, a California Senate bill was introduced and approved by then Governor Ronald Reagan in 1975. This resulted in a judiciary process that began in 1977 and in 1978, resulted in a Judgment establishing the safe Yield of the Basin at 140,000 acre-feet per year, allocating water rights among producers, and creating a Watermaster. Three committees were formed representing water right holders: the Overlying (Agricultural) Pool, the Overlying (Non-Agricultural) Pool, and the Appropriative Pool. Representatives from each of the three Pool Committees formed the Advisory Committee. The 1978 Judgment adopted and mandated the continuance of the Committees and created the Chino Basin Watermaster (CBWM) which was assigned to the Chino Basin Municipal Water District. In 1998 the Court issued an Order that assigned the Watermaster role to an independent nine-member Board, tasked with creating an Optimum Basin Management Plan to sustainably manage the Basin. The Watermaster retained separate counsel and hired staff and consultants to carry out its duties.




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**SCOPE**

The CBWM is an arm of the Court responsible for administrative and management duties of the Chino Basin. The CBWM works with the Advisory and Pool Committees representing parties with water rights, approximately twenty-five (25) cities, water districts, and private water companies, fifteen (15) private entities, and three hundred (300) agricultural producers. Peter led the technical work and stakeholder outreach to recalculate the safe yield of the basin and supported the legal effort to reset the safe yield twice. Additionally, he managed the technical work and stakeholder outreach to update the Basin management plan and supported the legal effort to secure Court approval. Peter directed the technical work and stakeholder outreach to update the recharge master plan and supported the legal effort to secure Court approval; provided overall coordination of identified recharge improvement projects including detailed project progress and financial reporting to stakeholders. Peter and his team managed the technical work and stakeholder outreach to update the Storage Management Plan for Chino Basin and supported the legal effort to secure Court approval.

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**OUTCOME**

All Watermaster objectives were met. Peter’s leadership in the technical work and stakeholder outreach resulted in the development of an updated Basin Management Program including a Storage Management Plan and a Subsidence Management Plan. He ensured compliance with SGMA, state requirements for adjudicated groundwater basin management, and supported litigation related to the Judgment. Peter supervised the evaluation of recharge applications, annual water rights leases, permanent water rights sales, and Judgment intervention applications. Peter gave overall direction and leadership to the organization including preparation of meeting agendas and minutes, budget development, bookkeeping and financial reporting, website development, culture development, and staff mentoring and growth.

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**CONTACT**

Scott Slater, Watermaster General Counsel    [sslater@bhfs.com](mailto:sslater@bhfs.com)    (805)895-3200  
Key Team Members: Peter Kavounas, PE

## PROJECT TEAM INFORMATION

The proposed **Hallmark Group Project Team** will work collaboratively to meet the needs of the EMA GSA. The team, with breadth of knowledge and expertise, will support and ensure smooth transition to management of overall administration, project implementation, communication and coordination, financial management, and public engagement activities. Hallmark Group has the resources to perform all tasks identified in the scope of work and estimates 100% of the overall effort to be completed by the proposed project team.

**Our Project Team members are the leaders who will ensure the EMA GSA is effectively administered and operated.** The Hallmark Group offers both historical and current regional context along with the technical knowledge to complete the scope and achieve EMA GSA goals. In addition to the proposed staff, our firm can draw from a deep bench of industry expertise, if requested. **Detailed resumes for the Project Team are included in the Attachments section of this qualifications submittal.**



**PRINCIPAL & GSP STRATEGIC IMPLEMENTATION LEAD - Taylor Blakslee** brings nearly 20 years of relevant water resources management experience. Taylor provides Executive Director services to the Cuyama Basin GSA and the Eastside Water Management Area and serves as an extension of staff and SGMA support for the County of San Luis Obispo. Taylor brings a unique understanding of the requirements of public agencies, Brown Act, regulatory reporting, consultant management, grant management, and Board and stakeholder engagement.



**EXECUTIVE DIRECTOR - Peter Kavounas, PE** has provided leadership in public water administration for over 35 years, overseeing the management of one of the largest groundwater basins in California, the Chino Basin, serving over 1.2M Californians. Peter has also managed the water utility for the City of Glendale, a city of approximately 200,000 people, for over eight years. Prior to those engagements he was the Eastern Sierra Environmental Engineer for the City of Los Angeles involved in groundwater management, environmental restoration, and water rights management including litigation.



**CONTROLS & ACCOUNTING - Jacqueline Harris, CPA** is a certified public accountant with over 30 years of fiscal management expertise. She develops agency budgets and financial reports for public agencies, watermasters, and GSAs which provide the information necessary to monitor current performance and forecast future performance. She manages grant funding and serves in a financial accounting role for the Cuyama Basin GSA and major infrastructure Joint Powers Authorities throughout California.



**GSA COORDINATOR - Grace Bianchi** has a strong background in environmental research, data analysis, and administrative coordination. Grace has helped in organizational oversight and provided administrative skills to support the Executive Director team. She supports project activities, facilitation and management of public meetings, materials development, and presentations.

## PROJECT APPROACH

The Hallmark team understands the challenges facing the EMA GSA and provides a team with the experience necessary to address those challenges. Our team brings the strong leadership, organizational, facilitation, and communication skills necessary to identify critical activities and ensure they are completed effectively.



## IMPLEMENTATION

The Hallmark Group approach to administration of the EMA GSA will be grounded in accountability, decisiveness, and transparency. We will collaborate closely with the incumbent team to learn their roles, detail out the existing activities, expectations, and processes to fully understand our new roles within the organization, and how to smoothly integrate and assume those tasks.



**Administrative Management** activities will be performed by **Peter Kavounas as Executive Director** with support from Grace Bianchi. Peter will be the primary report to the Board, oversee technical work, review financial reports and the draft budget, and provide recommendations and direction to staff. Peter will be supported by Grace who will be tasked with staff management and daily coordination, meeting materials development, and administrative correspondence. In advance of EMA GSA Board, Committee, and Community Advisory Group meetings, a review cadence will be implemented to ensure packets are reviewed by necessary parties, distributed, and posted in accordance with the Brown Act. Hallmark Group will conduct a management meeting through the transition phase to update the status of tasks and ongoing administration.



**Communication and Coordination** tasks will be managed by **Grace Bianchi as GSA Coordinator** communicating with the Board, Committees, Community Advisory Group, and the public to ensure the EMA GSA is operated in a timely and transparent manner. Grace will develop meeting packets inclusive of the consent agenda, meeting reports, and other administrative items as needed. Peter and Grace will facilitate the meetings and provide relevant updates and recommendations to the Board as needed. Grace will ensure that work efforts and the integrated team are well informed, and their efforts coordinated.

Board of Directors meeting preparation and coordination will be achieved jointly by the team dependent upon functional areas of expertise. Agendas, minutes documentation, and Board

elections will be managed by Grace, and the Bills Payable and Treasurers Reports will be developed by Jacqueline Harris.

Committee and Community Advisory Group meeting preparation, communication, and facilitation will be executed similarly to that of the Board meetings for consistency and clarity with Grace managing materials development, distribution, and posting, with direct reporting by Peter. Materials will include agendas, meeting minutes, staff reports, and other relevant information.

Website administration will be managed by Grace. The website will serve as a public resource for current and accurate information, as well as ensuring compliance with the Brown Act. Items to be posted to the website will include meeting notices, meeting packets which include notices, agendas, minutes, and staff reports, and other material that might be useful in the overall management of the EMA GSA.



**Financial Reporting** will be managed by **Jacqueline Harris serving in a Controls & Accounting** capacity. She will coordinate and record all financial transactions, work with the team to develop annual budgets and cash flow projections, provide monthly budget reporting, annual work plan development, and oversee annual audit functions. Jacqueline will interface with Grace to develop monthly tracking of invoices, accounts payable, receivables, billing compliance, document retention, and billing software maintenance. Hallmark Group manages and supports grant reporting for many of our clients and is available to support the EMA GSA with grant reporting and administration as well.



**Contract Administration** will also be managed by **Jacqueline** to ensure effective consultant management, deliverables are met, and that invoicing processes are managed within the bounds of the stated terms. As needed, Jacqueline will be supported by the team in the development of RFP's and solicitation process management responding to questions, tracking respondents, and facilitating the award process in coordination with the General Counsel and EMA GSA Engineer. Additionally, Jacqueline will administer grant agreements coordinating with the funding entity as needed. Finally, Jacqueline will ensure all EMA GSA liability insurance is maintained, renewed, and audited for appropriate coverage.



**Project Implementation** will be overseen and managed **by Taylor, Peter, Jacqueline, and Grace**. Having managed implementation of projects for GSAs throughout California, Taylor will serve an important advisory role to not only ensure implementation but also collaborate with the team to overcome challenges as they arise. Peter, Grace, and Jacqueline will track milestones, coordinate with consultants, track funding, monitor compliance metrics, and coordinate with the California Department of Water Resources, as required.

## PROPOSED STAFFING LEVEL, ROLES, AND ORGANIZATIONAL STRUCTURE

The organizational structure below outlines the Hallmark team. Each box is led by an exceptionally qualified individual having the specialized skills to manage their assigned tasks. These individuals will work together seamlessly and clearly demonstrate the Hallmark team’s capability to carry out the services for EMA GSA in the most efficient manner.

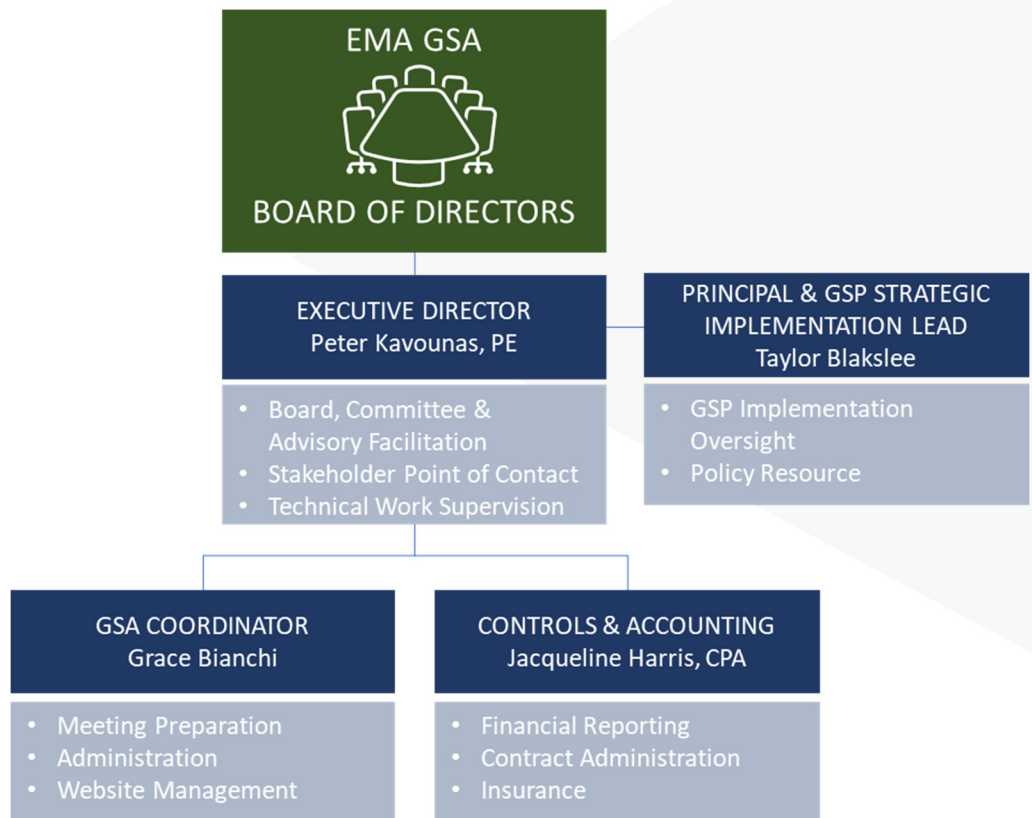
**Our approach to staffing the EMA GSA is lean in order to keep costs down by leveraging existing resources within the Hallmark team. Should the EMA GSA need additional support, our team is fully dedicated and will commit resources as needed.**

Providing team leadership will be **Peter Kavounas as Executive Director** and serve as the single point of contact and accountability for the Board.. He will be the report out of assigned activities and tasks and guide discussions for GSP implementation. Within the Hallmark Group team each activity or task is assigned an owner. The task owner is responsible to the Executive Director for all their assigned activities and tasks. This approach to accountability reduces project friction by encouraging decision making at all levels of the organization and provides a path for escalation of issues or decisions that require executive input.

**GSP Coordinator will be Grace Bianchi** charged with staff management, preparation, and facilitation of meetings. She will coordinate amongst the Board, staff, and stakeholders to ensure needs are addressed in a timely and thorough manner.

Additionally, Grace will diligently track issues through resolution, update the website, support compliance and agreements, manage grant reporting, serve as a point of contact for GSA stakeholders, and support ongoing communication and coordination.

**Project Controls & Accounting Lead** will be **Jacqueline Harris** tasked with the fiscal component including budget development, cash flow projections, financial reporting, billing, payments, contract administration, grant funding management, audit oversight, and insurance requirements.



## PROPOSED TRANSITION PLAN AND SCHEDULE

The Hallmark Group has developed a high-level overview of the key activities and milestones to successfully transition tasks from existing staff to the integrated team. Our approach to development of the transition schedule is rooted in close coordination with the existing EMA GSA staff to ensure no activities are missed and to properly identify all sub-tasking that must be assumed at the end of the transition phase.

The Hallmark Group strategy behind the development of the transition schedule will seek to:

- ✓ Determine the appropriate level of engagement and coordination to ensure balance between functionality and cost-effectiveness
- ✓ Ensure accountability by assigning an owner responsible for performing each task

The Hallmark team’s focus on accountability and regular communication will ensure a clear vision of the administration for the EMA GSA. We anticipate that with close coordination and EMA GSA dedication to timely decision-making, the tasking as requested in the Request for Qualifications may transition sooner than the schedule below.

Our transition approach is sub-divided into three phases:



### Phase I: Onboarding

The first phase of our engagement will be focused on learning the key activities, timing, and existing processes associated with each of the tasks for the existing EMA GSA staff. Hallmark Group will plan a kickoff meeting for introductory purposes and to allow for an overview of the immediate needs of the EMA GSA staff. The Hallmark team will also schedule individual introductions with staff, Board members, key stakeholders, and others necessary as identified by EMA GSA staff.

From that point forward, Hallmark Group will implement a meeting series with existing EMA GSA staff to identify upcoming needs and timing to complete the tasked activities. Our team will identify and document with each staff member the specific items to transition to Hallmark staff and will memorialize these items into a transition Tracking Matrix. Hallmark Group will establish sessions with individual EMA GSA staff to walk through existing source files, templates, systems training needs, website interface management, database maintenance etc., all of which will be updated in the transition Tracking Matrix to ensure all activities are captured.

Hallmark Group will review existing reports, Board packets, website postings, attend preparation meetings, shadow staff, and participate in the first month of Committee, Community Advisory Group, and Board meetings. Systems training will occur in this phase which will further allow our team to vet the level of effort to ensure proper coverage of the tasks to be transitioned.

### Phase II: Transition Review

The second phase of the EMA GSA Administration would involve the Hallmark team assuming key tasks from existing EMA GSA staff with continued oversight and review by former task owners to ensure knowledge transfer. It will require close coordination and communication, continued internal meetings, and soliciting feedback from existing staff. While at this point, the Hallmark team will be completing the tasks independently, the team will still be reliant upon the institutional knowledge of the EMA GSA staff to respond to questions and be available for support as needed.

**Phase III: Full Administration**

The final phase will be Hallmark Group assuming administration tasking to the full extent with no additional support from incumbent EMA GSA staff. Final review of the transition Tracking Matrix will allow staff to confirm that the activities have no additional transitional needs, and that Hallmark Group is fully functioning in the administrative capacity. It is assumed that existing staff have offboarded appropriate tasks and that tasks are being completed thoroughly and accurately by the Hallmark team with little to no reliance upon former task owners.



## KEY PRIORITIES

The ultimate goal of the Hallmark team serving as Executive Director for the EMA GSA will be to ensure the transparent and effective management of the basin while ensuring full compliance with SGMA. Key priorities for the Hallmark team in management of the basin will focus on function, integration, compliance, and implementation of Group 1 Management Actions.



### FUNCTION

The onboarding process described above will result in a thorough understanding of current staff roles and complete transition from existing support to a long-term management team at the direction of the Board. Our team will assume management of financial reporting against approved GSA budgets and provide cash flow analysis to assure the GSA can make its financial commitments to implement the GSP. Should additional expertise become required for the effective implementation of the GSP, Hallmark Group will work with the GSA to provide those services internally, hire sub-consultants to provide the expertise, or develop public procurement solicitations such as RFPs or RFQs to fulfill the identified need.

### INTEGRATION

The Hallmark team will seamlessly integrate with additional EMA GSA resources, such as legal counsel, rate consultant, and the current technical teams. Hallmark will manage contracts, provide scope of work oversight, and coordination. We will actively focus on achieving a common understanding among all resources to develop a clear work plan and reporting, so actions are coordinated and performed as cost-effectively as possible to ensure the GSP operates within its funded budget.

### COMPLIANCE

Basin compliance with SGMA will be at the forefront of the Hallmark team's management approach. With strong existing relationships throughout both local and state agencies, our staff will establish a rapport with the relevant DWR team as early as possible. This will ensure mutual familiarity and will help develop a collaborative relationship. A good relationship with DWR staff will lead to more effective management as it will result in early identification of regulatory concerns and cooperative solutions.

Coordinated with this effort, a reporting schedule will be developed to meet the needs of various stakeholder groups as well as DWR. Reports will be developed with varying levels of detail to meet the users' needs including regular Board reports, grant reporting, and annual SGMA report.

In their assessment of the EMA GSP, DWR staff have made a number of recommendations which include corrective actions. Hallmark Group will begin work with the available technical and legal resources and the other two GSAs to address these as early as possible, so they are resolved in time for the required first periodic GSP evaluation due by January 2027.



## IMPLEMENTATION OF GROUP 1 MANAGEMENT ACTIONS

The Hallmark team will actively focus on Group 1 Project Management Actions identified in the GSP, specifically: data gathering to address gaps; development of a pumping fee program; well registration and well meter installation program; and water use efficiency programs. Hallmark Group will become familiar with Group 2 Project Management Actions and Group 3 Projects for later consideration. Additionally, Hallmark Group would propose the basin consider establishing a data management system to house and report out on relevant information collected by the basin in Group 1 Management Actions.

### 1. ADDRESS DATA GAPS

The EMA GSA needs to **Expand the Monitoring Well Network**. This will require both landowner outreach and coordination with the GSA Technical Team. Hallmark Group has successfully implemented this action in other GSAs like the Cuyama Basin Groundwater Sustainability Agency by assessing DWR and industry-standard guidelines to determine the appropriate well density. The assessment was presented for stakeholder review, triggering further refinements, followed by implementation with landowners. In the Paso Basin, Hallmark Group assisted the County in a broader effort utilizing a Technical Advisory Committee of local stakeholders to collaboratively identify 150 wells to be added to the existing 23-well network. The Hallmark team coordinated landowner access agreements with GSA general counsel and began implementation of the expanded monitoring network meeting DWR requirements. With long-standing existing consultant relationships and a collaborative approach, Hallmark Group will ensure successful implementation of this important management action.

To ensure wells are appropriate to be included in the expanded monitoring well network, the Hallmark team will work with consultants to oversee and **Perform Video Surveys to Confirm Well Construction**. The team will first seek to educate landowners with a goal of driving good management decisions for better outcomes in the basin.

Coordinating with the technical team to ensure accuracy for the region, **Water Usage Factors and Crop Acreages** will need to be developed and refined. In similar GSA management actions, Hallmark Group has utilized DWR cropping datasets and annual land use surveys to complete this action. In situations where more current information is needed, we have contracted directly with Land IQ to gain access to the most recent land use data. Additionally, we have requested individual land use surveys for verification of actual use. This ensures public transparency and assists GSAs in implementing projects and management actions using the best data and science available.

Hallmark Group will also address the data gaps in the monitoring of Groundwater Dependent Ecosystems (GDE), both by installing the two contemplated shallow piezometers in the two high priority GDEs and by conducting surveys and investigation for further potential GDEs in the basin.

Several components of the fieldwork required in the Group 1 Management Action 1 – Address Data Gaps will be performed by subconsultants that will be selected and managed by Hallmark Group.

### 2. GROUNDWATER PUMPING FEE PROGRAM

Acknowledging the EMA GSA has an RFQ to solicit a rate consultant, Hallmark Group will integrate with the selected consultant providing oversight, will help to manage the decision process, and facilitate

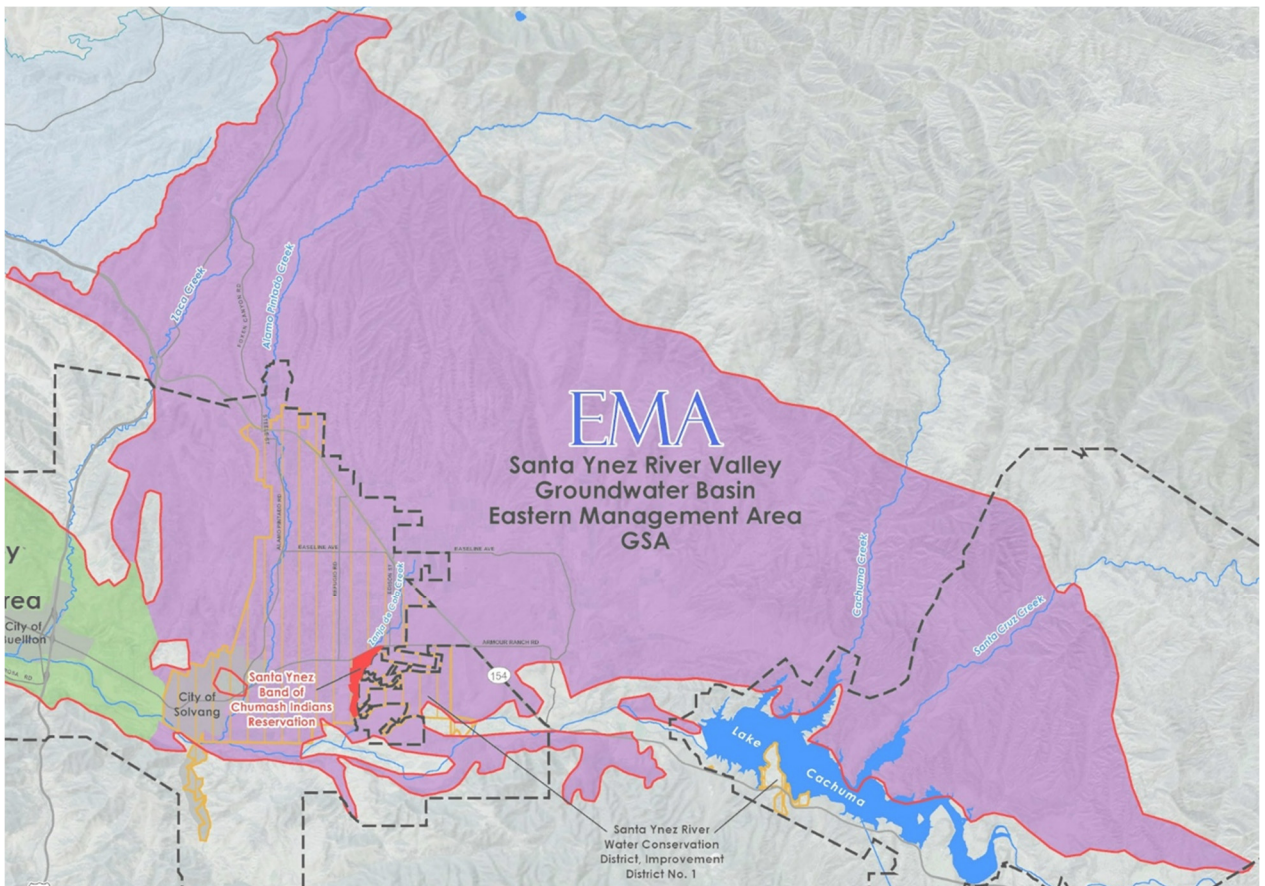
refinement with the Board and public input. In the Cuyama Basin, the Hallmark team oversaw the implementation of a groundwater extraction fee (Prop 26) to fund the administration of the GSA which includes an annual fee report and public rate hearing.

### 3. WELL REGISTRATION PROGRAM AND WELL METER INSTALLATION PROGRAM

With a focus on landowner education and transparency of available data, Hallmark Group will work with the technical team to implement the registration and meter installation program. Similar to the EMA GSA, Hallmark Group has completed this management action with CBGSA through implementing a process where landowners would register existing wells with a form. Additionally, the GSA well registration policy was coordinated and communicated with county permitting entities to ensure new well permits complete the form as part of their application process. As mentioned earlier, Hallmark Group recommends the creation of a database where all relevant data, including well ownership, location, and meter information can be stored and cross-referenced for internal basin-management purposes.

### 4. WATER USE EFFICIENCY PROGRAMS

Hallmark Group will manage the effort to develop enhancements to existing water use efficiency programs, with a focus on gathering input from rural, agricultural, and municipal pumpers as the foundation for future recommendations if requested by the Board.



## POTENTIAL RISKS AND MITIGATION

The most significant risk to the EMA GSA would be falling out of compliance resulting from **lack of cooperative action among stakeholders**. The inability of stakeholders to reach consensus on critical decisions, e.g. well metering, data reporting, pumping fees, groundwater use reporting, etc., is very likely to interfere with both proper function of the GSA and proper basin management, in addition to lack of compliance with SGMA. Transparency and proactive communication are the primary mitigation strategies against this risk. To the fullest extent possible, Hallmark Group will make information available to all stakeholders and thoroughly listen to all concerns so that issues are resolved and do not create a challenge for the EMA GSA Board.

Secondly, the EMA GSA's ability to respond to the **unknowns of future compliance needs and changing SGMA requirements** will be important in the years to come. Additional monitoring, reporting, or requirements for new expertise, may be necessary to respond to these needs. Hallmark Group's nimble management approach can mitigate these changing needs through its ability to provide ad hoc resources internally, or seek specialized expertise on behalf of the EMA GSA.

A final risk to consider is **ensuring compliance and implementation of DWR-recommended GSP Corrective Actions amongst all three basins** to avoid involvement of the State Water Resources Control Board, implementation of a probationary plan, losing control over basin outcomes, and expensive reporting costs. Mitigation for this risk will be Hallmark Group's immediate efforts to integrate, collaborate, and communication with other GSAs to focus on the DWR staff recommended corrective actions:

1. Incorporating the action plan associated with the management of the Santa Ynez River Alluvium into the GSP and GSP implementation.
2. Filling data gaps and better understanding the principal aquifers.
3. Evaluating methodologies and terminology in the water budgets for better consistency across the three management areas.
4. Reevaluating the sustainable management criteria for the chronic lowering of groundwater levels.
5. Reevaluating the sustainable management criteria for the degradation of water quality.
6. Addressing inconsistencies in the sustainable management criteria for land subsidence.
7. Reevaluating the sustainable management criteria for the depletions of interconnected surface water.

It will be critical for basins to continue to work together to achieve sustainability and successful implementation of the EMA GSA GSP.



## GENERAL ADMINISTRATIVE INFORMATION

PROPOSED CLASSIFICATIONS	RATE
Executive Director - Peter Kavounas, PE	\$325 /hr
Principal, GSP Implementation - Taylor Blakslee	\$275 /hr
Controls & Accounting - Jacqueline Harris, CPA	\$250 /hr
GSA Coordinator - Grace Bianchi	\$175 /hr

ADDITIONAL FIRM RESOURCE CLASSIFICATIONS	RATE
Principal / Strategic Advisor	\$350 /hr
Vice President / Program Manager	\$350 /hr
Director of Water Operations and Management	\$350 /hr
Director of Water Resources Development	\$350 /hr
Director of Water Supply Management	\$350 /hr
Director of Water Infrastructure	\$350 /hr
Policy and Agreement Matters	\$500 /hr
Director of Water Policy	\$350 /hr
Senior Project Manager	\$275 /hr
Project Controls Manager	\$250 /hr
Senior Project Controls	\$200 /hr
Project Manager III	\$225 /hr
Project Manager II	\$200 /hr
Project Manager I	\$185 /hr
Project Analyst	\$185 /hr
Project Coordinator II	\$175 /hr
Project Coordinator I	\$150 /hr
Project Controls Coordinator	\$150 /hr
Project Administrator	\$125 /hr

### Rates

Hourly rates are inclusive of all overhead and administrative expenses. Travel and other incidental expenses shall be reimbursed at cost. Mileage expenses shall be reimbursed at the current IRS rate. Upon request, Hallmark Group will provide a cost proposal for additional staff that may be required to support the client. Other costs will be determined upon final scope requirements and approved by the client.

This rate schedule shall be escalated annually as mutually agreed to by Hallmark Group and the client and will incorporate year-over-year increases per the U.S. Bureau of Labor Statistics Employment Cost Index for Professional and Business Services.

### Proprietary Statement

Nothing contained in this submittal or subsequent interview (if applicable) is proprietary.

### Insurance

See Certificate of Liability Insurance on following page noting Comprehensive General Liability, Automotive Liability, and Workers Compensation coverage.

Client#: 1572819

HGCPMINC

**ACORD**<sup>TM</sup>

**CERTIFICATE OF LIABILITY INSURANCE**

DATE (MM/DD/YYYY)

7/11/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer any rights to the certificate holder in lieu of such endorsement(s).


<b>PRODUCER</b> USI Insurance Services LLC 2375 E. Camelback Road, Suite 250 Phoenix, AZ 85016 877 468-6516	<b>CONTACT NAME:</b> Kathi Simon <b>PHONE (A/C, No, Ext):</b> 602 666-4827 <b>FAX (A/C, No):</b> 610 537-2283 <b>E-MAIL ADDRESS:</b> kathi.simon@usi.com
<b>INSURED</b> HGCPM, Inc. dba The Hallmark Group 500 Capitol Mall, Suite 2350 Sacramento, CA 95814	INSURER(S) AFFORDING COVERAGE INSURER A : James River Insurance Company NAIC # 12203
	INSURER B : California State Compensation Ins Fund 99999
	INSURER C : Underwriters at Lloyd's London L0032
	INSURER D : Allmerica Financial Benefit Ins. Co. 41840
	INSURER E :
	INSURER F :

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> BI/PD Ded:2,500 GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:	X	X	0005841611	07/01/2024	07/01/2025	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$50,000 MED EXP (Any one person) \$1,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$2,000,000 \$
D	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY	X	X	AWFD25295406	05/16/2024	05/16/2025	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB CLAIMS-MADE DED RETENTION \$			000826517	07/01/2024	07/01/2025	EACH OCCURRENCE \$1,000,000 AGGREGATE \$1,000,000 \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		X	907561923	09/30/2023	09/30/2024	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
C	Professional Liab			ANE122348824	07/01/2024	07/01/2025	\$1,000,000/\$2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
**General Liability, including completed operations, and Auto Liability include an automatic Additional Insured endorsement that provides Additional Insured status to the Certificate Holder, only when there is a written contract or written agreement between the named insured and the Certificate Holder and with regard to work performed by or on behalf of the named insured. General Liability, Auto Liability and Workers Compensation provide a blanket Waiver of Subrogation in favor of the same, when required by written (See Attached Descriptions)**

<b>CERTIFICATE HOLDER</b> HGCPM, Inc. 500 Capitol Mall, Suite 2350 Sacramento, CA 95814	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
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ATTACHMENTS: PROJECT TEAM RESUMES



#### EDUCATION

Bachelor of Science in  
Business Administration  
Finance Concentration,

California State University  
Bakersfield

#### INDUSTRY TENURE

20 years

## TAYLOR BLAKSLEE PRINCIPAL & GSP IMPLEMENTATION LEAD

Taylor Blakslee brings nearly two decades of relevant water management experience to the EMA GSA. Mr. Blakslee serves as the Assistant Executive Director of the Cuyama Basin Groundwater Sustainability Agency and the Eastside Water Management Area in the Kern subbasin and brings a strong understanding of GSP implementation and management of the public process including Board interaction, stakeholder engagement, and Brown Act compliance. Notably, his in-depth experience and understanding of Board processes and interaction with Directors and senior-level management has made him an effective communicator and able to resolve issues that arise. Mr. Blakslee's skills include project management, consultant management, Board reporting, budget/cash flow development, and regulatory compliance. Mr. Blakslee is service-oriented and enjoys working with clients to deliver exceptional results.

#### SELECT RELEVANT EXPERIENCE

##### **County of San Luis Obispo SGMA and Administrative Support** Project Manager – 2022 to Present

Taylor provides management support to the County of San Luis Obispo Groundwater Sustainability Department (GSD) including preparation of Board of Supervisor updates, SGMA policy and compliance strategy, SGMA updates, coordinating compliance with Fair Political Practices Commission filings, coordination for both the County GSAs and basin management committees. Mr. Blakslee also conducts general administration tasks such as outreach, meeting preparation and facilitation, stakeholder coordination, web-posting management, County department coordination, budget development, and grant funding and administration.

##### **Cuyama Basin Groundwater Sustainability Agency** Project Manager - 2018 to Present

Mr. Blakslee provides policy support, project management, and financial management service for the Cuyama Basin Groundwater Sustainability Agency Board of Directors. His responsibilities include preparing for and facilitating regular project management meetings with technical consultant teams to track tasks and monitor schedule issues; managing the Board meeting process, including materials development, memo creation, budget development and financial reporting; coordinating various information requests that arise from Board members and public stakeholders; coordinating grant administration and performing document control.

### **Eastside Water Management Area**

#### **Assistant Executive Director – 2018 to Present**

Mr. Blakslee provides Assistant Executive Director services to the Eastside Water Management Area (EWMA) including administrative and policy support, technical consultant management, and representation at regional Groundwater Sustainability Agency meetings. The Kern Sub-basin of the Tulare Basin has been identified as a high priority Basin by DWR, which is subject to conditions of critical overdraft. Non-district landowners contracted with in the eastern portion of Kern County contracted with the Hallmark Group to develop and implement its GSP. The EWMA membership currently includes 46 members who own approximately 38,000 acres.

### **California WaterFix**

#### **KCWA Administrative Assistant – 2007 to 2018**

Taylor supported Kern County Water Agency through their involvement in the development and planning phase of the California WaterFix (formerly the Bay Delta Conservation Plan), a \$17 billion program to provide a more reliable water supply to over 25 million California residents. Taylor coordinated with the Board, stakeholders, and other agencies to provide project updates and to support development of the Kern County implementation strategy.

### **Kern County Water Agency**

#### **Administrative Assistant - 2006 to 2018**

Mr. Blakslee's time at KCWA equipped him to interact effectively with Board members and the public. He coordinated with KCWA's Public Education and Outreach consultant on all public and media inquiries. His duties included coordinating KCWA's vehicle procurement program, creating PowerPoints for educational and technical purposes, managing specific cost centers in KCWA's budget, and tracking departmental tasks.





## PETER KAVOUNAS, PE EXECUTIVE DIRECTOR

Peter Kavounas is a licensed Civil Engineer. For over ten years Peter has overseen the management of one of the largest groundwater basins in California, the Chino Basin, which is the largest source of water supply for over 1.2 million people. Peter has also managed the water utility for the City of Glendale, a city of approximately 200,000 people, for over eight years. Prior to those engagements he was the Eastern Sierra Environmental Engineer for the City of Los Angeles involved in groundwater management, environmental restoration, and water rights management including litigation.

### CERTIFICATIONS

Licensed Civil Engineer

### EDUCATION

Master of Science – Water Resources/University of Southern California

Master of Engineering – Structural Engineering/University of California, Berkeley

Bachelor of Civil Engineering/University of Minnesota

### INDUSTRY TENURE

35+ years

### SELECT RELEVANT EXPERIENCE

#### **Chino Basin Watermaster** General Manager - 2012 to 2023

Responsible for administrative and management duties of the Chino Basin Watermaster ; Board. Peter led the technical work and stakeholder outreach to recalculate the safe yield of the basin and supported the legal effort to reset the safe yield twice. Additionally, he managed the technical work and stakeholder outreach to update the Basin management plan following 20 years of implementation, and supported the legal effort to secure Court approval. Peter directed the technical work and stakeholder outreach to update the recharge master plan, and supported the legal effort to secure Court approval; provided overall coordination of identified recharge improvement projects including detailed project progress and financial reporting to stakeholders. Peter and his team managed the technical work and stakeholder outreach to update the Storage Management Plan for Chino Basin, and supported the legal effort to secure Court approval. He led the technical work and stakeholder outreach to develop a Subsidence Management Plan for the affected portion of the Basin. Ensured compliance with SGMA and all other state requirements for adjudicated groundwater basin management. Supported litigation on various matters related to the Judgment. Provided direction to staff for implementation of routine Judgment provisions. Provided overall direction and leadership to the organization including preparation of meeting agendas and minutes, budget development, bookkeeping and financial reporting, website development, culture development, staff mentoring and growth.

**Santa Clarita Valley Water District (Castaic Lake Water Agency)****Board Member (elected position) - Jan 1999 to Nov 2013**

Elected member of 11-member State Water Contractor Board of Directors. Served as President and Vice President, and on various committees. Peter participated in Strategic Plan development for the Agency, served on Committee that guided the acquisition of a local retail water company, served on Committee that guided the search for a new General Manager following the retirement of the prior, long-term, General Manager. Peter participated in the decision-making during a time of incredible growth in the service area, including the planning, design, and construction of significant infrastructure. He also served on ACWA Region 8 Board; ACWA statewide Board.

**City of Glendale – Water & Power - 2004 to 2012****Assistant General Manager – Water**

Responsible for the operation of the water utility; report to Water & Power General Manager. Peter managed development of 10-year CIP prioritizing projects based on risk-assessment. Created long-term financial plan; issued \$50 million bond. Development of annual budgets; support for rate increase proposals. Implementation of system-wide AMI program in conjunction with electric utility. Asset Management initiative. Water Quality retooling initiative. Knowledge capture initiative including Electronic Operations Manual. Preparation of Urban Water Management Plan (2005, 2010). Replacement of 15mg underground concrete reservoir and pump station (American Public Works Association 2010 BEST Project of the Year). Successful negotiations for groundwater credits and for pollution clean-up. Grant-funded research and development of chromium 6 removal technology (American Academy of Environmental Engineers 2008 Research Grand Prize). Recipient of Association of Metropolitan Water Agencies Gold Award for Exceptional Utility Management. Leadership and management of the utility including metrics-based performance evaluation, staff mentoring, and culture development.

**City of Los Angeles – Water & Power - 1987 to 2004****Eastern Sierra Environmental Engineer - 1991 to 2004**

Peter completed stream and waterfowl habitat restoration plans; presented expert witness testimony to the State Water Resources Control Board. Managed groundwater pumping in Owens Valley to maximize production and at the same time protecting vegetation, and demonstrating compliance with resource management agreements. Prepared hydrologic reports and presented testimony at Superior Court. Facilitated multi-agency agreement resolving land and water supply issues associated with establishment of National Historic Site. Conducted artificial groundwater recharge study. Established in-house well inspection service. Successful AB 303 grant for well drilling.

**Engineering Associate – Water Distribution, Central District - 1989 to 1991**

Directed the work of a team in the maintenance and operation of portion of the distribution network.

**Engineering Assistant - 1987 to 1989**

At the direction of a supervisor performed structural analysis and design for various projects.

**IMODCO****Design Engineer - 1985 to 1987**

Design Engineer at the direction of a supervisor performed structural analysis and design for various projects.



## JACQUELINE HARRIS, CPA, CGMA CONTROLS & ACCOUNTING

Jacqueline has more than 30 years' experience in the fields of finance, strategic planning and risk management. Jacqueline spent 10 years in public accounting serving the financial, tax and business planning needs of clients in the fields of construction and public housing prior to joining Hallmark Group.

Jacqueline is responsible for the evaluation of short and long term strategic financial goals, developing, analyzing and reporting on financial data, advising stakeholders on the financial implications of business activities, preparation and management of budgets and forecasts, risk management, developing and implementing internal controls, performing internal audits, ensuring compliance with regulatory agencies, and managing contracts. Jacqueline's years of experience, personal integrity, and dedication has consistently demonstrated that she is a highly competent and trusted financial leader to the clients she serves.

### CERTIFICATIONS

Certified Public Accountant

Chartered Global  
Management Accountant

### AFFILIATIONS

American Institute of  
Certified Public Accountants

California Society of  
Certified Public Accountants

### EDUCATION

Executive Education,  
Harvard Business School  
Driving Corporate  
Performance & Strategic  
Financial Analysis

Bachelor of Science,  
Accounting and Finance  
University of La Verne

### INDUSTRY TENURE

30+ years

### SELECT RELEVANT EXPERIENCE

#### **B.F. Sisk Dam Raise and Reservoir Expansion Project (Sisk)** Project Controls - 2022 to Present

The Hallmark team serves as the Project Manager for the Sisk Project which seeks to increase storage capacity in San Luis Reservoir by adding 10-foot above the 12-foot embankment raise under development by the B.F. Sisk Dam Safety of Dams (SOD) Modification Project. Jacqueline and the Hallmark team are working with Reclamation and the San Luis Delta Mendota Water Authority to develop an Operations Plan, negotiate and execute the Cost Share Agreement, and develop an RFP for final project design. Jacqueline provides financial modeling analysis to inform allocation costs among investors, develops cash flow projections to inform project funding needs, and provides ad hoc reporting for members to support business case development.

#### **Storage Treatment Aquifer Recharge (STAR) Program** Project Controls – 2021 to Present

The STAR Program was conceptualized and is being designed and implemented by the Hallmark Group as a comprehensive program to optimize water resources for Westlands Water District. Program design is a multi-facility approach which includes upper aquifer water treatment, surface storage, and incorporation of groundwater storage and recovery wells for additional storage and added flexibility. Upon completion, the STAR Program is anticipated to yield an additional 1.9 million acre-feet of water over the next 30 years to further client goals of providing timely, reliable, and affordable water.

## **LeGrand Athlone Water District (LGAWD) Intertie Project**

### **Project Controls - 2021 to Present**

Hallmark Group provides project management support, grant administration, and construction management for the LGAWD Intertie Project which will provide surface water for irrigation or recharge and provide direct benefits to Underrepresented Communities. The Intertie Project will capture floodwaters via the construction of a canal and groundwater recharge basin in Le Grand. The canal will have multiple turnouts to provide approximately 6,750 acre/feet per year (AFY) of groundwater recharge through Flood Managed Aquifer Recharge (MAR) and approximately 1,350 AFY of groundwater recharge through the Bona Vista Recharge Basin.

## **Confidential Private Equity Due Diligence**

### **Consultant - 2019 to Present**

Jacqueline and the Hallmark team have been engaged by private equity and legal firms to provide due diligence analyses for potential water asset investments including financial analysis, valuation, agreements, feasibility, and associated risks. These analyses resulted in investors making informed decisions regarding potential opportunities.

## **Cuyama Basin Groundwater Sustainability Agency**

### **Project Controls – 2017 to Present**

The Hallmark Group serves as the Executive Director for the Cuyama Basin Groundwater Sustainability Agency (CBGSA) that was formed by a Joint Exercise of Powers Agreement by multiple agencies and districts under the Sustainable Groundwater Management Act. The Cuyama Groundwater Basin has been identified by the California Department of Water Resources (DWR) as a high priority basin and subject to conditions of critical overdraft. The CBGSA has developed a Groundwater Sustainability Plan (GSP) that prevents undesirable results and have identified and implemented actions and projects to reach its sustainability goal and bring the basin in balance by 2040. Jacqueline's key responsibilities for the CBGSA consist of development of internal controls, financial accounting and reporting, and assisting with the annual audit and budget preparation.

## **Lower Yolo Restoration Project**

### **Project Controls - 2016 to Present**

The Lower Yolo Ranch Restoration Project is located in the Sacramento-San Joaquin Delta. The project restored 3,400 acres on a site which has historically been used for pasture and cattle grazing. Jacqueline works with project owners and consultants to maintain the project budget, ensure contract compliance and perfect regulatory filings.

## **California WaterFix Planning Program Management**

### **Project Controls - 2009 to 2018**

Jacqueline oversaw Hallmark's Program Controls team responsible for establishing program controls processes and procedures including establishing a baseline budget, developing a robust Project Change Management System to analyze and track changes to the baseline. Jacqueline drafted project control plans including the cost control plan, schedule control plan and the document control plan. She coordinated with the State of California to administer over 40 consultant contracts and reporting for the WaterFix.

## **University of California, Merced**

### **Project Controls - 2005 to 2009**

In 2002, prior to permit completion, the Hallmark Group was selected as the project's program manager and tasked with establishing budgetary, schedule, and quality-control measures that would ensure the timely opening of the University of California (UC) Merced campus at a constructed value of \$500M. Jacqueline assisted Hallmark Group's President and key management staff with the implementation of project and document controls, cost management, and financial reporting.



## GRACE BIANCHI GSA COORDINATOR

Grace has a strong background in environmental research, data analysis, and administrative coordination. Since her time with the Hallmark Group, Grace has assisted in organizational oversight and provided administrative skills that she will use to support the Executive Director role. She has supported project activities in facilitation and management of meeting series, informational materials, and presentations. Her dedication to detail will be useful in refining processes, improving communication strategies, and fostering collaborative decision making to support the management of EMA GSA.

### EDUCATION

Master of Environmental  
Science & Management,  
University of California,  
Santa Barbara

BS Biology, Purdue  
University, Indiana

### SELECT RELEVANT EXPERIENCE

#### **Cuyama Basin Groundwater Sustainability Agency**

Project Coordinator – 2024 to Present

Hallmark serves as Executive Director for the Cuyama Basin GSA to manage the development and implementation of the DWR-approved GSP by providing support services which includes project controls, schedule management, public administration, and outreach. Grace supports administrative duties including coordinating meetings such as the Board, Technical Forums, and Ad hoc committees, where she ensures accurate documentation through preparation of meeting minutes and dissemination of meeting materials. She communicates with landowners and stakeholders to provide updates and facilitates invoicing for groundwater fees. She has contributed to outreach initiatives to enhance community engagement through preparing flyers and translation services.

#### **County of San Luis Obispo**

Project Coordinator – 2024 to Present

The Hallmark Group was brought on by the County of San Luis Obispo to provide administrative services for the implementation of SGMA Grant funded projects in the Paso Basin. Grace's role has included coordinating contractor communications to manage invoicing and progress reporting. She assists in the preparation of GSA Staff, Standing Advisory Committee, and Board of Directors meetings by attending, preparing minutes, and distributing mailout packets.

#### **Eastside Water Management Area**

Project Coordinator 2024 – Present

Hallmark Group serves as Executive Director for the EWMA which was formed to provide SGMA coverage for roughly 36,000 acres on the eastside of Kern County. Grace supports the team to keep the management activities on schedule and under budget. She facilitates meetings, prepares minutes, manages action items and coordinates with all stakeholders.



# Statement of Qualifications

Executive Director services for the Santa Ynez Basin Eastern  
Management Area Groundwater Sustainability Agency

The logo for the Eastern Management Area (EMA) consists of the letters 'EMA' in a large, blue, serif font. The letters are positioned above a light blue, semi-transparent reflection of themselves.

Santa Ynez River Valley Groundwater Basin  
Eastern Management Area  
Groundwater Sustainability Agency



**CONFLUENCE**  
ENGINEERING SOLUTIONS

August 9th, 2024

Eastern Management Area Groundwater Sustainability Agency

August 9th, 2024

**Subject: Statement of Qualifications to provide Executive Director consulting services for the Santa Ynez Basin Eastern Management Area Groundwater Sustainability Agency**

Confluence Engineering Solutions, Inc. (ConfluenceES), is pleased to submit the following Statement of Qualifications (SOQ) to provide Executive Director consulting services for the Santa Ynez Basin Eastern Management Area Groundwater Sustainability Agency (EMA GSA). It is our understanding that the EMA GSA is seeking an Executive Director to perform administrative and management duties to support the EMA GSA Joint Powers Authority in fulfilling its mission to successfully implement its Groundwater Sustainability Plan (GSP) and comply with the requirements of the Sustainable Groundwater Management Act (SGMA).

Like many small water resource management organizations on the Central Coast, Groundwater Sustainability Agencies have limited to no dedicated staff and typically rely upon contract technical and managerial support for the operations and management of their organizations. ConfluenceES was founded specifically to support organizations such as the EMA GSA and we believe that our combination of extensive experience providing water resource management support and our collaborative approach to multi-agency organization facilitation makes ConfluenceES an ideal fit for the role of Executive Director for the EMA GSA.

We can effectively provide the administrative, planning and implementation, financial, and community engagement services needed to support the EMA GSA in fulfilling its mission to provide a sustainable groundwater supply for the Santa Ynez regional community. Listed below are several key differentiators that help set ConfluenceES apart from our competition.

**Groundwater Resource Agency Administration** – For the past 4 and a half years, ConfluenceES has been providing Executive Director support services for the Los Osos Basin Management Committee (Los Osos BMC). The Los Osos BMC is a multi-agency organization formed to implement the Los Osos Basin Plan and ensure a sustainable groundwater supply for the community of Los Osos. Over that time, ConfluenceES has effectively built consensus amongst the participating parties, managed construction of new monitoring wells, obtained funding for the development of a transient groundwater model and other groundwater management projects, and successfully obtained and administered numerous grants. ConfluenceES will leverage the systems and knowledge gained supporting the Los Osos BMC to cost-effectively support the administration and management of the EMA GSA.

**Local Knowledge and Relationships** – ConfluenceES has extensive relationships and knowledge of the communities and agricultural interests located here on the Central Coast and understands the roles and concerns that each of the communities, water utilities, agricultural landowners, regulatory agencies and governmental organizations have within the EMA portion of the Santa Ynez groundwater basin. Our Executive Director project team includes Jeff Barry, consultant team Project Manager responsible for development of the approved EMA GSP. His depth of knowledge of technical hydrogeology, regulatory framework, GSP elements, and relationships with many key stakeholders within the basin will provide significant value to the EMA GSA.



**Program Management** – ConfluenceES has extensive experience providing effective coordination of large multi-disciplinary teams to deliver successful planning documents, public works infrastructure programs, and projects. We can provide continuity amongst a multi-agency team and be a primary point of contact for the EMA GSA Board of Directors (Board) and agency staff, key stakeholders, funding and regulatory agencies, and the public to obtain current, accurate information on the status of EMA GSA initiatives to assist with making the timely, informed decisions needed to drive the successful implementation of the GSP. We can also offer cost-effective administrative assistant support to perform various administrative duties in support of the Executive Director, EMA staff, and Board.

**Water/Wastewater/Recycled Water Systems and Agricultural Operations Expertise** – Our knowledge of drinking water treatment and distribution, wastewater, and non-potable and potable reuse recycled water systems and understanding of agricultural stakeholder interests in water will allow us to effectively assist the EMA GSA in identifying and delivering cost-effective, sustainable solutions to address their water supply and water quality challenges.

**Santa Ynez River Health and Fish Habitat Knowledge** – While groundwater dependent ecosystems (GDEs) are not thought to be significant in extent within the EMA, there is a great deal of sensitivity from NOAA Fisheries and other environmental organizations about maintaining river flows and water quality for listed fish. The GSP calls for installation of shallow piezometers in a couple of areas that may potentially contain GDEs and we are aware the EMA has made a commitment to DWR to help identify and educate well owners who may be pumping surface water from river underflow.

**Long Term Water Strategy Support** – ConfluenceES has extensive experience evaluating multiple alternatives and developing strategic solutions for managing groundwater and surface water resources. Our knowledge of the ever-changing surface water, groundwater, imported water, and recycled water supply availability and requirements within the adopted GSP will allow us to assist the EMA GSA in making informed decisions for the future of the stakeholders that they serve.

**State/Federal Grant Coordination** – Our team has significant experience preparing applications, developing agreements, documenting activities, and ultimately obtaining funding from external parties to support numerous projects for various Central Coast communities. ConfluenceES has led numerous projects that have included partnering with state and federal funding organizations to provide grants and low-interest financing to assist communities in delivering sustainable water management and infrastructure solutions.

We hope that this SOQ conveys our interest and the benefits that ConfluenceES can provide as the Executive Director for the EMA GSA. If you have any questions about the SOQ, please contact Dan Heimel at (805) 459-8498 or danheimel@ConfluenceES.com.

Sincerely,



**Dan Heimel, PE, MS**

**President/Principal Engineer**



## Firm Overview

Confluence Engineering Solutions, Inc. (ConfluenceES) is a water resource engineering firm dedicated to helping people and organizations identify and develop sustainable water solutions. ConfluenceES understands the value of bringing people together to create more powerful opportunities than one individual or organization can develop alone. We are focused on collaborating with water, wastewater, and recycled water utilities, agricultural water users, and domestic well owners to develop reliable, resilient water supplies and systems. We can effectively communicate with multiple stakeholders and build consensus toward solving complex water resource challenges.

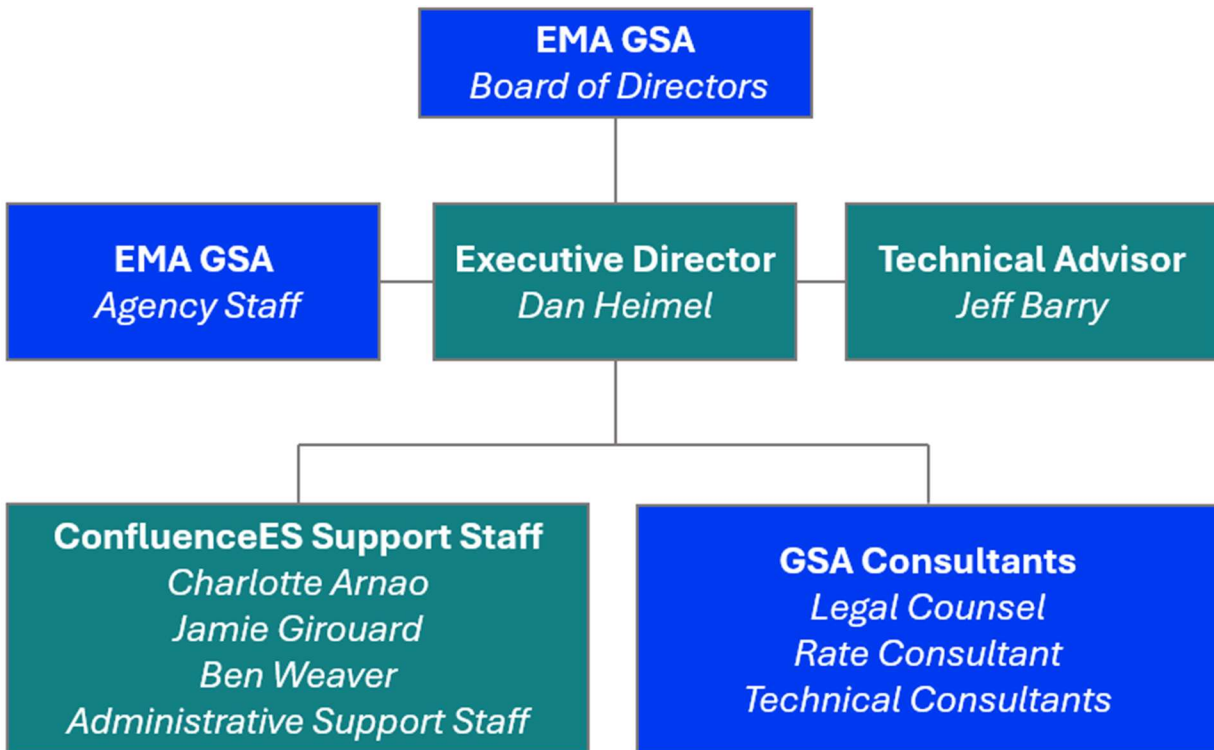


Dan Heibel founded ConfluenceES (S Corporation) in November 2021. With its headquarters in Los Osos, California, ConfluenceES is a registered Small Business and Small Business PW with the State of California and has extensive experience supporting utilities and organizations manage their water supply resources. ConfluenceES focuses on providing water supply resiliency and reliability planning; water, wastewater, and recycled water program management; utility engineering, operations, and regulatory compliance support; regional, multi-agency water supply and infrastructure collaboration facilitation; and groundwater management services for Central Coast water utilities and water resource management agencies.

Our size (currently four total employees) and regional focus on Central Coast water resources allows us to cost effectively provide water resource management and administrative support for local water agencies and utilities.

# Project Team

Provided below is a proposed organizational chart for the Executive Director support services, including potential roles for the EMA GSA Board of Directors, EMA GSA Agency Staff, GSA Consultants, and the Executive Director support staff (Executive Director, Technical Advisor, ConfluenceES Support Staff).



## Confluence Engineering Solutions

**Executive Director** - Dan Heimel is a licensed Civil Engineer, Water Treatment (T2) and Distribution (D4) Certified Operator, and will be the Project Manager, principle point of contact, and dedicated Executive Director resource for the EMA GSA. Dan has spent his career providing management and engineering services to support water resource agencies and utilities in efficiently managing their water supplies and systems.

For the last decade plus, Dan has focused on supporting Central Coast communities and has developed extensive relationships with water utility staff, regulatory agencies, funding providers and the consultant community. These relationships will allow Dan and ConfluenceES to quickly identify the appropriate agency and person to assist in developing strategies to address challenges that the EMA GSA may be facing. Additionally, through our extensive work with regulatory agencies, we have developed a level of trust that will ensure that we can work collaboratively to develop cost-effective, sustainable solutions for sustainable groundwater management in the EMA. One of Dan's strengths is that he is an effective communicator and that he has the ability to facilitate collaboration amongst multiple parties to work through complex issues with a wide range of stakeholder interests.

**Technical Advisor** - Jeff Barry has joined ConfluenceES as a technical advisor and strategist for the EMA GSA Executive Director role. Jeff was the consultant team project manager for the EMA GSP that was approved by the Department of Water Resources (DWR) and he has extensive knowledge of the technical, regulatory, and political challenges in the EMA and the larger Santa Ynez Basin. He also has many positive relationships with basin stakeholders, including the agricultural community.

**ConfluenceES Support Staff** - Supporting Dan and Jeff at ConfluenceES will be Jamie Girouard, Charlotte Arnao, and Ben Weaver. Jamie and Charlotte are Water Resource Engineers with experience providing water resource management support for local, regional, and statewide water agencies. Ben is a Water Resource Engineering Assistant with a strong interest in water resource management.

It is anticipated that this project will include support from an administrative assistant to distribute meeting announcements, prepare meeting minutes, facilitate meetings (including Teams and Zoom), develop public communication materials, record financial transactions and other administrative duties. Initially, Dan Heimel and current ConfluenceES support staff will take on these duties to develop a comprehensive understanding of the administrative processes and procedures for the EMA GSA. Once the EMA GSA policies and procedures are fully established, ConfluenceES intends to bring on additional administrative support staff to assist with the management of the EMA GSA at a lower billing rate.

The following table provides an estimate of the percentage of time each team member will spend working on the project. The percentages may be subject to change once the EMA GSA Executive Director scope and budget is finalized with the EMA GSA.

Name	Role	Percentage of Total Project
Dan Heimel	Executive Director	50%
ConfluenceES Support Staff	Executive Director Support	35%
Jeff Barry	Technical Advisor/Strategist	15%

Resumes for the ConfluenceES Staff listed above are provided in Appendix A for reference.

# Applicable Experience

To meet the varying needs of our clients, ConfluenceES offers a wide range of administrative, financing, public relations, regulatory compliance, planning, engineering and operational services and can leverage our experience and water resource management knowledge to support the EMA GSA. To illustrate our experience providing services similar to what the EMA GSA is seeking from an Executive Director, we've included the following descriptions of recent, relevant projects that our team has worked on, and the services provided.

## Executive Director – Los Osos Basin Management Committee

ConfluenceES provides Executive Director services for the Los Osos Basin Management Committee (BMC) to facilitate management of groundwater resources for the community of Los Osos. In 2015, the Los Osos Community Services District, Golden State Water Company, County of San Luis Obispo and the S&T Mutual Water Company (BMC Parties) agreed to a Stipulated Judgement which called for the formation of the Basin Management Committee (BMC) to facilitate the implementation of the Los Osos Basin Plan, the plan to ensure the sustainability of the Los Osos Basin. As Executive Director, Dan Heibel and ConfluenceES support staff coordinate the activities of the BMC, including facilitating Public Meetings, developing and maintaining budget and finances, overseeing development of the Annual Report and other initiatives, coordinating Party Staff Meetings, and managing projects.

Additionally, as Executive Director, Dan Heibel facilitated the BMC Parties in the development of a Strategic Implementation Plan to build consensus and align the BMC on where to focus its staff and financial resources. In 2021, Dan Heibel led the BMC through an updated evaluation of the Sustainable Yield for the Los Osos Basin and achieved unanimous approval of an updated Sustainable Yield estimate which will inform the Los Osos Community Plan and potential future of new development in Los Osos.

Through the BMC ConfluenceES, has extensive experience in providing executive director services, including:

- Compliance with the Brown Act
- Developing agendas, agenda packets, and meeting minutes
- Website management for public organizations
- Facilitating both public and staff-level meetings
- Responding to public comment and inquiry
- Coordinating and managing consultants, including: legal consultants; financial consultants; hydrogeologist; and other technical consultants
- Coordinating with other organizations on behalf of the BMC, including: National Estuary Program; Los Osos Community Advisory Committee; California Coastal Commission; County of San Luis Obispo; Los Osos Sustainability Group, etc.

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### Reference

#### **Ron Munds**

General Manager  
Los Osos Community Services District  
2122 9<sup>th</sup> Street, Suite 110, Los Osos, CA 93402  
[rmunds@losososcscsd.org](mailto:rmunds@losososcscsd.org)  
(805) 528-9379

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### Duration

2020-Present

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### Key Personnel

#### **Dan Heibel**

Principal Engineer

#### **Jamie Girouard**

Associate Water Resource Engineer

#### **Ben Weaver**

Engineering Assistant

## Groundwater Sustainability Plan – EMA GSA

While working for GSI Water Solutions, Inc. Jeff Barry managed the development of the GSP for the EMA GSA. During the development of the GSP, there were several complex issues that had to be resolved, including: potential interconnection of basin aquifers with the Santa Ynez River; complex structural geology and boundaries to flow; assessing underflow to downstream subbasins; and balancing water supply needs of various stakeholders (water district, farmers, ranchers, grape growers, tribal governments, and domestic water users). As part of the project, Jeff led numerous public meetings and workshops on various topics and collaborated with stakeholders to develop approaches for sustainable management criteria, projects, and management actions that could be agreed upon by the EMA GSA and approved by DWR.

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### Reference

**Matt Young**  
Water Agency Manager  
Santa Barbara County 130 E.  
Victoria St., Suite 200  
Santa Barbara, CA 93101  
[mcyoung@countyofsb.org](mailto:mcyoung@countyofsb.org)  
(805) 568-3546

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### Duration

2021-2023

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### Key Personnel

**Jeff Barry**  
Senior Hydrogeologist and  
Water Resources Consultant

## Seawater Intrusion Extraction Barrier – Salinas Valley Basin GSA

ConfluenceES is supporting the Salinas Valley Basin Groundwater Association (SVBGSA) in the development of the conceptual design for a potential Seawater Intrusion Extraction Barrier Project. The Salinas Valley Basin (Salinas Basin) supports ~1,000 square mile of California’s most vital agricultural land, but water quality has been significantly degraded by seawater intrusion into the 180/400-Foot Aquifer and Monterey Subbasins.

One of the projects identified in the GSP to mitigate the undesirable effects of seawater intrusion was the potential to create a seawater intrusion extraction barrier. This conceptual project, includes constructing a series of extraction wells along the coastline in the 180/400-Foot Aquifer and Monterey Subbasins to continuously extract groundwater, form a hydraulic barrier by lowering groundwater levels, and prevent seawater intrusion from advancing further inland than the well barrier. This project would generate significant volumes of brackish water (a mixture of freshwater and salt water) that could be desalinated and used as a new potable or non-potable water supply or for injection back into the 180/400-Foot Aquifer and Monterey Subbasins.

ConfluenceES is supporting the SVBGSA as a Technical Advisor for the development of the conceptual design for the Seawater Intrusion Extraction Barrier Project. Additionally, ConfluenceES formed a Seawater Intrusion Extraction Barrier Working Group that includes participation from Alameda County Water District, United Water Conservation District, and Mesa Water to assist SVBGSA in collaborating with other agencies implementing seawater intrusion extraction barrier projects.

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### Reference

**Sarah Hardgrave**  
Deputy General Manager  
SVBGSA  
P.O. Box 1350  
Carmel Valley, CA 93924  
[hardgraves@svbgsa.org](mailto:hardgraves@svbgsa.org)  
(831) 471-7512 x208

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### Duration

April 2023 – Present

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### Key Personnel

**Dan Heimes**  
Principal Engineer

**Jamie Girouard**  
Associate Water Resource  
Engineer

## Recycled Water Program Management – Morro Bay

The City of Morro Bay’s (City) Water Reclamation Facility (WRF) Program will provide regulatory required treatment upgrades and relocate the City’s Wastewater Treatment Plant (WWTP), a critical facility, away from coastal and flood hazards and provide the City with a more reliable and resilient water supply portfolio. The project consists of three primary elements:

- A Water Resources Center (WRC) to provide the City with a new sustainable, drought resistant, and natural disaster resilient water supply.
- Pipelines and pump stations to convey wastewater from the existing WWTP to the WRC, treated effluent to the City's ocean outfall, and advanced purified water for recycled water use.
- Recycled water pipelines and injection wells to inject up to 887 acre-feet per year of advanced purified water into the Morro Groundwater Basin to increase recharge, create a barrier against seawater intrusion, reduce nitrate contamination, and offset use of potable water for irrigation purposes.

ConfluenceES is the Program Manager for the recycled water component of the WRF Program. Development of this sustainable, drought resistant recycled water supply will provide water security for the City, reduce its reliance on Sacramento-San Joaquin Delta imports, improve local groundwater quality, and increase the City’s ability to provide water to other local water utilities to improve regional water supply reliability and resiliency.

As the Recycled Water Program Manager, ConfluenceES is currently managing the multi-disciplinary consultant team needed to develop a design for the recycled water program that provides the optimum water supply benefits, while meeting all the constraints associated with constructing a large public works project on the coast of California. This work includes collaboration with City Staff on consultant procurement and management, providing presentations at City Council and Public Meetings, developing funding strategies and coordinating with the agencies providing grant and low-interest financing, and all other program management duties required to deliver the Recycled Water program.

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### Reference

#### **Greg Kwolek**

Public Works Director  
City of Morro Bay  
955 Shasta Avenue  
Morro Bay, CA 93442  
[gkwolek@morrobayca.gov](mailto:gkwolek@morrobayca.gov)  
(805) 772-6564

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### Duration

2021-Present

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### Key Personnel

#### **Dan Heimesl**

Principal Engineer

#### **Jamie Girouard**

Associate Water Resource  
Engineer

#### **Charlotte Arnao**

Assistant Water Resource  
Engineer

#### **Ben Weaver**

Engineering Assistant

## Long-Term Water Supply Evaluations

### City of Morro Bay

The City of Morro Bay (City) currently possesses a water supply portfolio that consists of two primary sources of water: imported water from the State Water Project (SWP); and groundwater pumped from the Lower Morro Valley Groundwater Basin (Morro Basin). The City is in the process of implementing a Recycled Water Program that will include injection of advanced purified recycled water into the Morro Basin to enhance recharge, prevent seawater intrusion, and improve groundwater quality.

To assist the City in evaluating how to integrate its new recycled water resource into its water supply portfolio, ConfluenceES developed a Water Supply Operations Model (Supply Model) that was utilized to evaluate water management strategies under current and potential future hydrologic and demand conditions. The results of the Water Supply Evaluation indicate that the City's current water supply portfolio is vulnerable to extended drought conditions (e.g. drought from 2020 to 2022). However, with implementation of the Recycled Water Program it is anticipated to address this water supply deficiency under current and potential future demands and to provide surplus SWP water that the City could sell for cost recovery for its rate payers.

### Oceano Community Services District

The Oceano Community Services District (Oceano CSD) has a diverse water supply portfolio it uses to provide drinking water to its customers. This portfolio consists of groundwater from the Santa Maria Valley Groundwater Basin, surface water from Lopez Reservoir and imported water from the State Water Project (SWP). Historically, Oceano CSD has been able to leverage its multiple water supplies to reliably provide water to its customers during extended drought periods.

Recent changes to the water supply contracts that Oceano CSD has for its Lopez and SWP supplies (i.e. Zone 3 Contract Changes and Water Management Tools Amendment) provide new opportunities for how Oceano CSD can manage its water supplies to provide additional water reliability, resiliency against infrastructure failures and cost recovery opportunities.

To assist Oceano CSD in evaluating these new water supply opportunities, ConfluenceES developed a Water Supply Operations Model (Supply Model) that was utilized to evaluate Oceano CSD's water supplies under potential future hydrologic conditions. The findings from the future water supply scenario analysis, indicate that the Oceano CSD can utilize SWP water, Stored SWP water, Lopez Water, Stored Lopez Water and groundwater over varying drought cycles to meet its customer's water demands and that there is the potential to maximize revenue recovery through entering into exchange or sales agreements for its surplus SWP and/or Lopez water supplies.

### Reference

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**Damaris Hanson**  
Utilities Division Manager  
City of Morro Bay  
160 Atascadero Rd, Morro Bay, CA 93442  
[dhanson@morrobayca.gov](mailto:dhanson@morrobayca.gov)  
O (805) 772-6265  
F (805) 772-6268

### Duration

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**Morro Bay**  
August 2022 – October 2023

**Oceano**  
December 2022 – April 2023

### Key Personnel

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**Dan Heimel**  
Principal Engineer

**Jamie Girouard**  
Associate Water Resource Engineer



## Master Water Report/Resiliency Risk Analysis - SLOFCWCD

ConfluenceES is supporting the San Luis Obispo County Flood Control and Water Conservation District (SLOFCWCD) in the development of their Master Water Report (MWR). The San Luis Obispo County Master Water Report (MWR) details water resource planning and management for all of San Luis Obispo County (SLO County) and is updated periodically to reflect significant changes in the county's water infrastructure, regulations, and supply-demand assessments. Since the last update in 2012, there have been critical developments such as the Sustainable Groundwater Management Act, adoption of the Water Management Tools Amendment, increased allocations from the Nacimiento Water Project, and the formation of the Countywide Water Action Team. These, along with advancements in potable reuse projects, drought conditions, and regional desalination, underscore the need for a "living document" approach to the MWR to ensure it remains current with evolving water resources and planning documents.

ConfluenceES has been supporting the MWR by updating the water system drought, natural disaster, infrastructure failure and regulatory compliance vulnerability scoring system for SLO County water utilities (Resiliency Risk Analysis). This update involves comparing the SLOFCWCD's Regional Water Infrastructure Resiliency Plan (RWIRP) scoring metrics to the Department of Water Resources' (DWR) 2023 Water Shortage Vulnerability Tool metrics and developing a new scoring system that leverages the best components of both systems and will be a key component of the updated MWR.

Additionally, ConfluenceES is the Stakeholder Engagement lead for the MWR update and has worked with the project team to identify and outreach to stakeholders who have a role in managing or using data related to water supply/demand and water system vulnerability. Through this role, ConfluenceES is leading and facilitating meetings with key project stakeholders to get input and build consensus around the approach to updating the water system resiliency evaluation process. ConfluenceES will additionally be leading workshops with water utility representatives to score and rank water system vulnerabilities based on agreed-upon criteria.



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### Reference

#### **Brendan Clark**

Supervising Water Resources Engineer  
County of San Luis Obispo/San Luis Obispo County Flood Control and Water Conservation District  
[bclark@co.slo.ca.us](mailto:bclark@co.slo.ca.us)

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### Duration

2022-Current

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### Key Personnel

#### **Dan Heibel**

Principal Engineer

#### **Jamie Girouard**

Associate Water Resource Engineer

#### **Ben Weaver**

Engineering Assistant

# Project Understanding and Approach Summary Table

The following table outlines key priorities identified by ConfluenceES for each of the scope tasks included in the Executive Director RFQ. Additionally, included are potential risks and mitigation strategies that ConfluenceES recommends for providing the requested services in a cost-effective and timely manner. We look forward to the potential opportunity to review these priorities and strategies with the EMA GSA in further detail.

Scope Task	Key Priorities	Potential Risk Factors and Mitigation Strategies
<b>1. Administrative and Management Duties</b>	<ul style="list-style-type: none"> <li>▪ Effective multi-agency collaboration</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Communication/relationship breakdowns</b> – Based on our extensive experience facilitating multi-agency organizations and multidisciplinary program teams, ConfluenceES has developed numerous mitigation strategies to maintain effective communication and collaborative relationships between organizations. These strategies, which include a multi-pronged approach to outreach and communication that includes 1-on-1 conversations, staff level meetings, small group mediation, public workshops and other communications strategies have proven effective at building and maintaining collaboration amongst diverse groups of stakeholders with varying motivations/interests.</li> </ul>
<b>2. Groundwater Sustainability Plans and Projects</b>	<ul style="list-style-type: none"> <li>▪ Oversee the implementation of GSP and SGM implementation grant initiatives</li> <li>▪ Audit and update the GSP</li> <li>▪ Complete GSP Reporting Requirements</li> <li>▪ Coordinate with DWR and the other two GSAs in the basin</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Meeting the SGM implementation grant schedule</b> - Coordinating with and gaining access to private landowner properties takes a lot of time, so providing sufficient time in the schedule to coordinate with property owners is crucial.</li> <li>▪ <b>Sufficient monitoring program budget</b> - Sounding probes and other equipment may be lost during monitoring and funding for replacements should be included in the respective budgets in case it is needed.</li> <li>▪ <b>Landowners’ lack of acceptance of water meters</b> – Investments in public outreach and exploring alternative methods for estimating water use as a potential stop-gap measure may be needed to establish a management area wide metering program, if that is the desire of the EMA GSA Board.</li> </ul>
<b>3. GSA Board Meetings and Regular Committee Meetings</b>	<ul style="list-style-type: none"> <li>▪ Preparing agendas/agenda packets, meeting minutes, and other meeting materials</li> <li>▪ Compliance with relevant rules/regulations (i.e. SGMA, Brown Act)</li> <li>▪ Meeting facilitation</li> <li>▪ Managing video recordings</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Brown Act violations when running a GSA or committee meeting</b> – Knowledge and experience working with the relevant rules and regulation (e.g. noticing meetings 72 hours in advance, and incorporating relevant meeting details [location, time, Zoom access, etc.] in the agenda/notice, etc.) is critical for avoiding Brown Act violations. ConfluenceES has been noticing and facilitating Brown Act Meetings for the Los Osos Basin Management Committee for the last four years without the need for Legal Counsel to be present at the meetings.</li> <li>▪ <b>Technical difficulties during virtual meetings are common</b> – ConfluenceES has experience using Zoom, Teams and other online meeting platforms and can effectively facilitate in-person/virtual hybrid meetings.</li> <li>▪ <b>Meeting recording hosting costs</b> – Utilizing YouTube or other free video hosting platforms can allow for cost effective meeting recording access and archiving.</li> <li>▪ <b>Clunky meeting recordings</b> – With a limited level of effort, ConfluenceES can edit video recordings (thumbnail, timestamps, auto-generated closed captioning and transcripts, trimming, etc.) to make them much more accessible and reduce the time it takes to find an individual item and the relevant discussion in the meeting recording.</li> <li>▪ <b>Inaccurate or costly meeting minutes</b> – Accurately transcribing everything that is said during a meeting is time consuming and efforts to paraphrase discussions can lead to inaccurate representations of what was said. As an alternative strategy the video recording can become the official meeting record and meeting minutes can be streamlined to be “Action Minutes” that focus on documenting the specific actions taken by the Board.</li> </ul>
<b>4. Consultant Coordination</b>	<ul style="list-style-type: none"> <li>▪ Consultant procurement support including:               <ul style="list-style-type: none"> <li>○ Preparation of draft scopes of work</li> <li>○ Development and distribution of Requests for Proposals (RFP) and Qualifications (RFQ)</li> <li>○ Preparation of addendums and responding to questions</li> <li>○ Consultant proposal review and interview facilitation</li> </ul> </li> <li>▪ Consultant scope, schedule, and budget management</li> <li>▪ Consultant team coordination</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Costly and lengthy legal reviews</b>– To avoid expensive legal reviews, ConfluenceES can work with dedicated EMA GSA legal counsel to develop template contracts and amendment documents that can be leveraged to reduce legal review level of effort and timeframes. Additionally, ConfluenceES will communicate clearly with legal counsel regarding the urgency and time sensitivity associated with each contract document.</li> <li>▪ <b>Consultant cost overruns and schedule delays</b> – Diligent project management is required when managing a consulting team consisting of multiple disciplines (e.g. rate study, legal counsel, hydrogeologic, engineering, etc.) and requires that someone effectively coordinate the efforts of the individuals to support the larger project moving forward. ConfluenceES has extensive experience as a program manager and consultant contract manager and will utilize earned-value budget/schedule management tools to keep consultant contracts within budget and on schedule.</li> <li>▪ <b>Uncoordinated consultant team</b> – Without proper oversight and coordination, technical consultants supporting the EMA GSA with numerous initiatives (i.e. rate study, annual GSP reports to DWR, a water well registration program, well construction data collection and documentation, groundwater pumping metering program, GDE piezometers and stream gauge installations, groundwater monitoring, and environmental permitting) can be inefficient. ConfluenceES will provide clear and consistent communication amongst the multi-disciplinary team and utilize an adaptive management coordination structure that includes group and 1-on-1 meetings to ensure efficient use of meetings time to avoid burdening the project budget with unnecessary meeting time and attendance.</li> </ul>

<p><b>5. Financial Information Coordination</b></p>	<ul style="list-style-type: none"> <li>▪ Establish an EMA GSA Bank Account</li> <li>▪ Tracking budgets and expenditures</li> <li>▪ Providing monthly financial summaries</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Challenges establishing a bank account</b> – ConfluenceES has experience setting up a bank account for an organization very similar to the EMA GSA and will utilize this knowledge/experience to streamline the process (e.g. obtaining an EIN; determining the appropriate tax-exemption status, etc.) for opening an organizational account.</li> <li>▪ <b>Unclear financial statements</b> - Financial documents and reports (e.g. balance sheet, bank reconciliation, revenues and expenditures, warrant register, etc.) can be difficult to understand, especially for those unfamiliar with accounting processes and procedures. ConfluenceES will utilize its experience working with these accounting procedures to develop accessible information for the EMA GSA Board and other stakeholders to be able to understand where the money is coming from, what it is being spent on and how much is remaining.</li> </ul>
<p><b>6. Other Services Necessary to the GSA</b></p>	<ul style="list-style-type: none"> <li>▪ Developing and maintaining an EMA GSA website</li> <li>▪ Complete periodic accounting audits</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Unwieldy, outdated website</b> – Certain website platforms can be difficult to utilize and update, however, ConfluenceES has experience with Streamline, the website platform the EMA GSA is currently using, and can cost-effectively keep it updated to ensure accurate and timely information is readily available for the Board and the public.</li> <li>▪ <b>Expensive accounting/auditing support services</b> – Through our role as Executive Director for the Los Osos BMC and work with other water resource management clients, ConfluenceES routinely works with contract accountants and other specialized consultants that are familiar with the relatively simple accounting needs of the EMA GSA. ConfluenceES can leverage these relationships to assist the EMA GSA in contracting with consultants that can cost effectively provide the necessary accounting/auditing services.</li> </ul>
<p><b>7. Principle Point of Contact for Stakeholders</b></p>	<ul style="list-style-type: none"> <li>▪ Effective communication with the EMA GSA staff and Board, landowners, groundwater pumpers and other interested parties</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Conflicting information and/or messaging amongst stakeholders</b> – ConfluenceES will be involved in all aspects of the EMA GSA to provide continuity among the project team and a go-to person for the Board to get accurate, up-to-date information on the EMA GSA status.</li> <li>▪ <b>Ineffective communication and unformed stakeholders</b> – To keep the EMA GSA staff and Board, landowners, groundwater pumpers and other interested parties informed and up-to-date on SGM implementation initiative status, ConfluenceES will prepare an Executive Director’s Report for presentation at EMA GSA Meetings that will include a summary description of work being performed and upcoming, issues that arose (if any), budget status, recommendations for addressing issues, and/or policy matters to be addressed by the Board. This and other focused outreach efforts will help prevent conflicts arising due to ineffective communication.</li> </ul>
<p><b>8. Facilitate EMA JPA Staff Meetings</b></p>	<ul style="list-style-type: none"> <li>▪ Preparing EMA GSA staff meeting agendas/agenda packets and other meeting materials</li> <li>▪ EMA GSA staff meeting facilitation</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Lengthy, ineffective meetings</b> – EMA GSA staff representatives have limited time and need efficient, concise meetings to not detract from their primary duties with their own organizations. ConfluenceES has extensive experience planning and facilitating multi-agency staff level meetings and will develop focused, targeted agendas and move quickly/efficiently through each item to keep staff representatives informed on the status of EMA GSA initiatives and issues.</li> </ul>
<p><b>9. Participate in basin-wide staff and board meetings</b></p>	<ul style="list-style-type: none"> <li>▪ Collaborate with other Management Areas via staff and board coordination meetings</li> <li>▪ Coordinated level of effort for SGM implementation grant tasks</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Failing to meet SGM Grant and SGMA deadlines</b> – It is critical that the Management Areas effectively work together to complete the individual and shared tasks included in the SGM Grant to ensure that all eligible costs incurred are reimbursed through the grant and SGMA deadlines are met. ConfluenceES has extensive experience supporting clients in meeting the scope and schedule requirements for grant and low-interest financing agreements and has determined that consistent check-ins or re-occurring meetings are helpful for ensuring there is a common understanding of the project status and expected outcomes.</li> <li>▪ <b>Overlapping levels of effort</b> – The SGM grant includes multiple tasks that are Management Area specific and that are shared across Management Areas. ConfluenceES will coordinate closely with the representatives from the other Management Areas to limit any overlap in the work being performed to provide the maximum available budget possible for implementation of GSP initiatives.</li> </ul>
<p><b>10. Other activities as directed by the Board of Directors</b></p>	<ul style="list-style-type: none"> <li>▪ Provide additional, as-needed support services for the EMA GSA (e.g. grant writing, permit applications, regulatory compliance, technical analysis, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Unanticipated needs</b> - It is very difficult to anticipate all of the support services that will be needed for a new multi-agency organization that was formed to comply with unprecedented landmark regulatory requirements. ConfluenceES has extensive experience working for small organizations and agencies providing a wide range of administrative, managerial, and/or technical support services. As these additional needs are identified, ConfluenceES will quickly evaluate if the necessary services can be cost effectively provided in-house or identify the recommended outside resources to assist the EMA GSA in fulfilling its goals and objectives.</li> </ul>

## Proprietary Statement

This Statement of Qualifications does not contain any proprietary information. Any subsequent interviews will either not include proprietary information, or if proprietary information is necessary, the interviewing party will be notified of the proprietary nature before disclosing.

## Insurance

ConfluenceES maintains insurance coverage for professional liability, general liability, automotive liability, and workers' compensation. ConfluenceES will not require additional support from sub-consultants for this role, so the requested insurance coverage only applies to ConfluenceES.

Insurance	ConfluenceES Coverage
Professional Liability	Yes
General Liability	Yes
Automotive Liability	Yes
Workers' Compensation	Yes

## Consulting Rates and Other Costs

Please see proposed rate schedule below for ConfluenceES for providing Executive Director Services for the EMA GSA.

Classification	Billing Rate (\$/hour)
Principal Engineer	\$225
Technical Advisor	\$225
Senior Engineer	\$190
Project Engineer	\$175
Associate Engineer	\$150
Assistant Engineer	\$140
Engineering Assistant	\$130

Direct expenses (e.g. travel, mileage (per IRS Rates), delivery/copy services, subconsultant services) will be invoiced with a 10% processing fee.

Confluence Engineering Solutions, Inc. reserves the right to revise our standard billing rates on an annual basis and personnel classifications may be added as necessary.

# Appendix A

## Resumes

# Dan Heimel, PE, MS

## Confluence Engineering Solutions



**TITLE:** PRESIDENT/PRINCIPAL ENGINEER

**Education:** Master of Science Degree, Civil & Environmental Engineering, California Polytechnic State University, San Luis Obispo, CA; Bachelor of Science Degree, Environmental Science, Chemistry Minor, Chico State University, Chico, CA

**License & Certifications:** Professional Civil Engineer #C80762, CA; D4 Water Operator #28472, CA; T2 Water Operator #26014, CA

**Affiliations:** President, Central Coast Branch of Groundwater Resources Association (GRA); Past President, Central Coast Chapter of WaterReuse

### Qualifications

Dan Heimel is a licensed Professional Engineer (PE) with a Master of Science in Civil and Environmental Engineering and over 20 years' experience demonstrating expertise in water supply, resiliency, and reliability planning; water, wastewater, and recycled water program management; utility engineering, operations, and regulatory compliance support; regional, multi-agency water supply and infrastructure collaboration facilitation; and groundwater management. He is a Central Coast water resource specialist who has focused his career toward facilitating collaboration amongst water utilities to develop reliable, resilient surface and groundwater water supplies to combat climate change, unprecedented drought conditions, seawater intrusion and other critical water resource challenges.

### Professional Experience

Oct 2021 - Present: President/Principal Engineer, Confluence Engineering Solutions, Inc. (ConfluenceES)

Apr 2010 - Oct 2021: Vice President/Principal Engineer, Water Systems Consulting, Inc. (WSC)

Jul 2005 - Jul 2009: Water Quality Specialist and Consultant, City of Redwood City

Jun 2002 - Jul 2005: Engineering Technician, Alameda County Water District

### Relevant Project Experience

**Program Manager, Recycled Water Program Implementation, City of Morro Bay, CA:** Program Manager for the City of Morro Bay's \$40 million Indirect Potable Reuse (IPR) recycled water program to develop a 1 MGD advanced treatment system and injection well network to treat and inject advanced purified recycled water into the Morro Groundwater Basin to increase recharge, prevent seawater intrusion and reduce nitrate contamination. This project will provide the City with a local, reliable, resilient source of water supply that provides water security and reduces its reliance on Sacramento-San Joaquin Delta imports.

**Program Manager, Central Coast Blue, City of Pismo Beach, CA:** Program Manager for the planning phases of the \$93 million recycled water program to capture and treat wastewater from the Cities of Arroyo Grande, Grover Beach and Pismo Beach for injection into the Santa Maria Groundwater Basin to prevent seawater intrusion and bolster local water supply resiliency. Oversaw the multidisciplinary team that supported project implementation including the engineering design team and hydrogeologic, environmental, and property acquisition consultants. Coordinated with staff, elected officials, the general public, and all stakeholder agencies on this critical regional recycled water program.

**Executive Director, Los Osos Basin Management Committee, Los Osos, CA:** Executive Director facilitating implementation of the Los Osos Basin Plan, management the annual monitoring program and development of Annual

Monitoring Reports for the Los Osos Groundwater Basin to develop a sustainable water supply and prevent seawater intrusion for the community of Los Osos. Coordinate the activities of the BMC, including facilitation of BMC Meetings, development and maintenance of BMC budget and finances. Lead the BMC parties in the development of a Strategic Implementation Plan to build consensus and align focus of staff and financial resources. Completed an updated evaluation of the Sustainable Yield for the Los Osos Basin and achieved unanimous approval of an updated Sustainable Yield estimate for the basin.

**Project Manager, Northern Cities Management Area Technical Group, County of San Luis Obispo, CA:** Project Manager for the cities of Arroyo Grande, Grover Beach and Pismo Beach, as well as the Oceano Community Services District (collectively the Northern Cities Management Area Technical Group or NCMA TG). Assisted the NCMA TG with conjunctive management of their Santa Maria Groundwater Basin and surface water supplies (Lopez Reservoir and State Water Project) to prevent seawater intrusion. Facilitated monthly NCMA Technical Group meetings to coordinate the water resources management efforts in unprecedented drought conditions. Developed numerous decision support tools to assist the agencies in making informed water resource management decisions. Led the development of two NCMA Technical Group Strategic Plans to better improve water supply reliability and resilience in the region.

**Project Manager, Regional Water Infrastructure Resiliency Plan, County of San Luis Obispo, CA:** Project Manager for the development of a regional water supply plan to assist in identifying and addressing potential water supply reliability and infrastructure resiliency risks for the County of San Luis Obispo and forty partnering water utilities. Assisted the District, Countywide Water Action Team and partnering water utilities in identifying and addressing potential water supply resiliency risks. Performed assessments to identify the agency water supplies potentially vulnerable to extended drought, infrastructure failure, natural disaster, changing requirements, water rights challenges, and other factors. Identified and designed multiple initiatives to improve water supply resiliency and reliability by providing access to additional water supply sources, more reliable water supply sources and/or enhanced conjunctive use opportunities, through intertie and/or transfer/exchange agreements.

**Principal Engineer, Master Water Report, County of San Luis Obispo, CA:** Water Utility liaison and stakeholder outreach lead for development of the Master Water Report and Data and Information Management System for San Luis Obispo County. Leading outreach to over 40 SLO County Water Utilities, Stakeholder Groups and Governing Boards. Developed updated resiliency evaluation methodology to assist the County in determining how to invest its resources to improve regional water supply reliability and resiliency.

**Project Manager, Cayucos Sustainable Water Project, Cayucos, CA:** Project Manager for the planning and site selection for the Cayucos Sustainable Water Project, a new greenfield wastewater treatment and recycled water facility to provide a future potable reuse recycled water source for the community of Cayucos. Lead preliminary engineering, siting and treatment process alternatives analysis and technical components of the EIR.

**Project Engineer, Coastal Branch Capacity Assessment, San Luis Obispo County Flood Control and Water Conservation District, CA:** Project Engineer for development and calibration of the GIS-based hydraulic model for the Coastal Branch, Chorro Valley and Lopez Pipelines and assessment of opportunities to increase State Water Project (SWP) deliveries to SWP subcontractors. Facilitated multiple SWP workshops to review future demand estimates. Identified a potential Chorro Valley pipeline hydraulic anomaly resulting in low pressure at key locations during low demand periods. Revealed impactful ways to increase SWP subcontractor deliveries, especially to those upstream of the energy dissipation valve pressure control structure.

**Project Manager, 2020 Urban Water Management Plan, City of Morro Bay, CA:** Project Manager supporting the development of the 2020 Urban Water Management Plan (UWMP) and Water Shortage Contingency Plan with an updated assessment of the water supply portfolio's anticipated capability to meet demands. Included an updated water system description, current and future water demand assessments, SBX7-7 compliance calculations, existing/future water supply availability, water service reliability and drought risk assessment, Water Shortage Contingency Plan, and Demand Management Measures.

# Jeff Barry, MS

## Confluence Engineering Solutions

Title: SENIOR HYDROGEOLOGIST AND WATER RESOURCES CONSULTANT



**Education:** Master of Science Degree, Hydrogeology/Hydrology, University of Nevada, Reno, NV; Bachelor of Science Resource Management, Humbolt State University, Arcata, CA

**License & Certifications:** Registered Geologist (Oregon); Licensed Geologist/Hydrogeologist (Washington); Certified Water Rights Examiner (Oregon)

### Qualifications

Jeff Barry recently retired from GSI Water Solutions, Inc. (GSI) and is now an employee with Confluence Engineering Solutions. As a founder of GSI, he has more than 35 years of experience conducting groundwater resource development projects and groundwater management programs in California and the Pacific Northwest. He is experienced with development and implementation of groundwater management plans, monitoring plans, safe yield assessments and groundwater recharge projects.

### Relevant Project Experience

**Project Manager, Groundwater Sustainability Plan, Eastern Management Groundwater Sustainability Agency, Santa Ynez, California:** While with GSI, managed the development of the Groundwater Sustainability Plan (GSP) for the Eastern Management Area (EMA) Groundwater Association (GSA). There are several complex issues to be resolved in this basin, including potential interconnection of basin aquifers with the Santa Ynez River, complex structural geology and boundaries to flow, assessing underflow to downstream subbasins, and balancing water supply needs of various stakeholders (water districts, farmers, ranchers, grape growers, tribal governments, and domestic water users). Led numerous public meetings and workshops on various topics. Worked with the GSA to develop alternatives for sustainable management criteria, projects, and management actions. The GSP was ultimately approved by the State Department of Water Resources (DWR).

**Senior Reviewer, New Well Application Reviews, Eastern Management Area Groundwater Sustainability Agency, Santa Ynez, California:** Provided review and assistance to GSI staff reviewing applications for installing new wells within the EMA. The reviews were conducted pursuant to the State of California's Governor's order requiring GSA approval of new well applications within the GSA.

**Project Manager, Groundwater Sustainability Plan, Santa Clarita Valley Groundwater Sustainability Agency, California:** Led a consultant team to develop a groundwater sustainability plan for the Upper Santa Clara River Basin. Assembled a team of experts who have been working in the basin for decades. The project included development of a basin-wide data management system, development of a Hydrogeologic Conceptual Model, identification of groundwater dependent ecosystems, development of sustainability criteria, development of projects and management programs, and preparation of the GSP. A significant technical element of the project included characterization of the interaction between groundwater and surface water and assessment of groundwater-dependent ecosystems along the Santa Clara River. Supported stakeholder outreach efforts and conducted workshops on various SGMA and GSP topics. The plan was ultimately approved by the State Department of Water Resources.

**Project Manager, Groundwater Sustainability Plan, San Antonio Basin Groundwater Sustainability Agency, California:** Managed the GSI team during development of the GSP for the GSA representing the San Antonio Basin, which predominantly serves agricultural users. Used data and information developed by the U.S. Geological Survey (USGS) and other previous studies to characterize groundwater conditions in the basin and reduce the cost of developing the plan. Developed a detailed water budget and assessed various groundwater management alternatives intended to recover



groundwater levels to sustainable levels. A significant element of the plan involved characterizing groundwater conditions in the vicinity of Barka Slough, a large groundwater-dependent ecosystem. Development of sustainability criteria that maintain habitat in the slough was critical because the slough is the natural discharge location for groundwater in the basin. The plan was ultimately approved by the State Department of Water Resources.

**Project Manager then Senior Reviewer, Groundwater Sustainability Plan, Carpinteria Valley Water District, California:**

Project manager for the development of Carpinteria Valley Water District's GSP. The Carpinteria Valley Basin is designated as a high priority basin and obtains a significant portion of its water supply from local groundwater for municipal and agricultural uses. Led a team of consultants who developed the technical elements of the plan and supported stakeholder outreach efforts. Because it is a coastal basin, seawater intrusion is a concern.

**Senior Reviewer, Groundwater Permit Litigation Support, City of Solvang, California:** Provided technical support for expert witness testimony related to the City of Solvang's groundwater permit application. This included testimony review and assistance with responding to questions from the hearings officer concerning potential impacts to fish habitat on the Santa Ynez River.

# Jamie Girouard

## Confluence Engineering Solutions

TITLE: ASSOCIATE WATER RESOURCE ENGINEER



**License & Certifications:** T2 Water Operator #46022; D2 Water Operator #53930; Remote (drone) Pilot #4941357

### Qualifications

Jamie Girouard is a California Polytechnic State University graduate with a Bachelor of Science in BioResource and Agricultural Engineering. Her education and experience in engineering allows her to assist in solving water related problems, manage water resources, and support water quality operations.

### Professional Experience

July 2023 – Present: Associate Water Resource Engineer, Confluence Engineering Solutions

June 2019 – December 2020: Research Assistant Engineer, California Polytechnic State University Internship

### Relevant Project Experience

**Project Engineer, Executive Director Support, Los Osos Basin Management Committee, CA:** Assisted with Executive Director tasks such as developing and maintaining the organization's Streamline website, recording meeting minutes and managing video recordings, sending out meeting notices/agendas/agenda packets, and preparing a grant application and Request for Proposals. Experience with the Brown Act compliance. Attended meetings in person and managed public comments.

**Project Engineer, Salinas Valley Basin Groundwater Association, CA:** Supported the Salinas Valley Basin Groundwater Association (SVBGSA) in the development of the conceptual design for a potential Seawater Intrusion Extraction Barrier Project, one of the projects identified in the GSP to mitigate the undesirable effects of seawater intrusion. Assisted in the development of the project's technical memorandum.

**Project Engineer, Nitrate Blending Plan, City of Morro Bay, CA:** Developed and received DDW approval on a thorough, user-friendly nitrate blending plan for use in everyday operations. This blend plan consists of clear recommendations for blending contaminated groundwater with State water. Blending under this plan is much more efficient for the City due to the additional electrical, chemical, and operational requirements, water losses, and costs associated with running their Brackish Water Reverse Osmosis System (BWRO) which was previously their only option for supplementing their State water supply with groundwater. Along with the procedures and recommendations, the blend plan includes spreadsheets for planning, timing, and calculating flows required from each source to meet demands while complying with MCLs. A monitoring and response procedure was developed based on the City's current monitoring procedures, their incomplete emergency blending monitoring procedures, and additional experience working with water utilities that utilize blending.

**Project Engineer, Recycled Water Program Implementation, City of Morro Bay, CA:** Assisted in the development of a Water Supply Evaluation Model for use in drought management and planning. The model was used to determine the best timing to implement the City's Indirect Potable Reuse (IPR) recycled water program. Supply vulnerabilities were assessed, and corresponding drought resiliency methods were developed by operating the model to include IPR water in the City's future water supply portfolio. Potential injection well locations were mapped and evaluated, as well as other uses for non-potable water, to create a Recycled Water Program implementation strategy.

**Project Engineer, Water Quality Monitoring, City of Grover Beach, CA:** Developed standard operating procedures for drinking water sampling and water quality monitoring. Evaluated data collection and recording methods to create user-friendly procedures and schedules. Followed standard operating procedures for sampling free and total chlorine, total

coliforms, HPC, nitrate, nitrite, general physical, pH, and orthophosphate at distribution locations. Collected lab samples and transferred them to the lab using proper handling procedures to observe temperature, holding time, and Chain of Custody (COC) constraints.

Prepared water quality compliance reports for Grover Beach to submit to the Division of Drinking Water. Organized a combination of water quality field logs and lab sampling results into an easily accessible format. Developed a water quality database to include this information, as well as other water quality data, for later use in the City's Consumer Confidence Report.

**Project Engineer, Methodology Framework for Lead Service Line Inventory, City of Grover Beach and City of Pismo Beach, CA:** Assisted in the development of a methodology framework for the Cities' Lead Service Line Inventories (LSLI), which is a regulatory requirement established by the U.S. Environmental Protection Agency (EPA) for water systems to develop and maintain an inventory of service line materials, particularly focusing on lead service lines. Developed and received DDW approval of a Stratified Random Sampling LSLI methodology for the Cities. The LSLI methodology preparation included compiling information on City water systems, water codes/standards, and property addresses accompanied by the year the property was built. First, addresses that were developed after the California lead ban or other standards that banned its use were marked as non-lead. A stratified random sampling methodology was used to verify the service line material for the remaining addresses. The remaining addresses were broken into three strata by construction date. The stratified random sampling methodology reduced the amount of physical field verifications from 2,904 addresses to 341 for Grover Beach and 2,695 addresses to 338 addresses for Pismo Beach.

**Research Engineer, CA Denitrification Bioreactor Project, California Polytechnic State University, CA:** The project focused on improving a method for capturing and treating nitrate-polluted agricultural wastewater. Designed and implemented eighteen bench scale bioreactors to analyze three different medias as carbon sources for the denitrifying bacteria. Water sampling and lab testing was used to compare the media's effectiveness as a carbon source. This experiment provided results for future use in improving the design for denitrification bioreactors for California climate.

# Charlotte Arnao

## Confluence Engineering Solutions

TITLE: ASSISTANT WATER RESOURCE ENGINEER



### Qualifications

Charlotte Arnao is a California Polytechnic State University graduate with a Bachelor of Science in BioResource and Agricultural Engineering. With a background in water resource engineering and agricultural water consulting, she is well equipped to help clients solve water supply and water quality related problems, manages their water resources, and provide compliance support for federal, state and local water regulations.

### Professional Experience

July 2024 – Present: Assistant Water Resource Engineer, Confluence Engineering Solutions

June 2022 – July 2024: Water Resource Analyst and Assistant Consultant, WestWater Research

June 2023 - September 2023: Irrigation Engineering Technician, Cal Poly Irrigation Training & Research Center (ITRC)

### Relevant Project Experience

**Project Engineer, WRF Program Funding/Financing Strategy Evaluation, City of Morro Bay, CA:** Evaluated scenarios to develop strategies to assist the City in leveraging multiple funding/financing sources to reduce the costs of the Water Reclamation Facility (WRF) Program. Developed and utilized a funding/financing model that evaluated the optimum funding utilization prioritization and disbursement amounts for the City's funding/financing portfolio, which included a: Environmental Protection Agency's (EPA) Water Infrastructure Finance and Innovation Act (WIFIA) Loan, State Water Resources Control Board Clean Water State Revolving Fund (CWSRF) Loan, United States Bureau of Reclamation's (USBR) Title XVI Grant, and California Department of Water Resources' (DWR) Integrated Regional Water Management (IRWM) Grant.

**Research Analyst, Assistant Consultant, Water Supply Valuations, CA & AZ:** Assisted with preparing valuations of the water supplies on agricultural and commercial properties. Provided clients with valuable information about the water quality, water levels, and water supply availability associated with properties they were interested in acquiring. Examined the implications of the Sustainable Groundwater Management Act (SGMA), including management of the Groundwater Sustainability Agency (GSA), potential limitations on the ability to use groundwater, and implementation of the Groundwater Sustainability Plan (GSP), and presented findings to the client.

**Research Analyst, Irrigation Conservation Research, Imperial Valley, CA:** Quantified water savings from the on-farm efficiency conservation program held by the Imperial Irrigation District (IID) and forecasted irrigation demands for farmers in the program by creating models to track their conservation based on evapotranspiration and effective precipitation trends. Replicated the IID's calculations of evapotranspiration of applied water and effective precipitation to ensure farmers' savings were accurately assessed by the district. Seasonal deliveries were graphically compared against a recommended delivery target and the IID's baseline. Data from CIMIS stations and on-farm meter readings in the Imperial Valley were used to prepare these estimates.

**Research Analyst, Water Market Updates, CA:** Daily research and data compilation on California water market transactions to update the Nasdaq-Veles California Water Index (NQH2O), a tool that tracks the spot price for California water entitlements and reflects the relative scarcity of water in California. Coordinated with city governments and water districts to investigate prospective transactions.

**Engineering Technician, Irrigation Demand Analysis, California Polytechnic State University, CA:** Maintenance of an Eddy Covariance station and analysis of the station's data in conjunction with the energy balance method to estimate evapotranspiration, a critical parameter for determining irrigation demands.

**Research Engineer, Western Crop Survey, California Polytechnic State University, CA:** Conducted a survey of fields in the western U.S. to quantify crop types, acreages, and gross incomes to compare to USDA National Agricultural Statistics Service Information (NASS) publications and advise farmers on crops with the highest earnings compared to their irrigation requirements.

# Ben Weaver

## Confluence Engineering Solutions

TITLE: ENGINEERING ASSISTANT



### Qualifications

Ben Weaver is currently attending California Polytechnic State University and pursuing his Bachelor of Science in Civil Engineering. Through his education at Cal Poly and experience at ConfluenceES, Ben has developed a strong interest in water resource management along the California Central Coast.

### Professional Experience

April 2024 – Present: Engineering Assistant, Confluence Engineering Solutions, Inc.

### Relevant Project Experience

**Engineering Assistant, 2024 Watershed Sanitary Survey Update, Cambria Community Services District, CA:** Prepared the 2024 Watershed Sanitary Survey (WSS) Update for Cambria Community Services District (District). Utilized the latest guidelines for preparing a watershed sanitary survey released by the Environmental Protection Agency (EPA) to summarize: the source water quality data, sources of contamination, physical and hydrogeological features of the District's watersheds, and any significant changes that had occurred in the watershed since the previous 2015 Sanitary Survey Update. Created maps in ArcGIS Online and charts in Microsoft Excel to summarize information and data relevant to the WSS project. Analyzed the ability of the District's infrastructure to meet requirements of the Surface Water Treatment Rule (SWTR). The District is required to maintain compliance with the Surface Water Treatment Rule because two of their potable extraction wells are classified as groundwater under the direct influence of surface water (GWUDI). This 2024 updated WSS will be submitted to the Division of Drinking Water (DDW) and is a requirement to bring the District into compliance with the SWTR.

**Engineering Assistant, 2024 Consumer Confidence Report, City of Grover Beach, CA:** Prepared charts for the Consumer Confidence Report (i.e. Annual Water Quality Report) for the City of Grover Beach. Entered water quality data collected throughout the year into a water quality database. Summarized the water quality data of the Santa Maria Basin Groundwater and Lopez Reservoir Treated Surface Water using a PivotTable in Microsoft Excel. Presented this data analysis in organized charts along with relevant Maximum Contaminant Levels (MCLS), Remedial Action Levels (RALs), and Public Health Goals (PHGs) and other information about the typical sources of contaminant for each water quality constituent. Submitted the charts to City of Grover Beach, which were subsequently published in their 2024 Consumer Confidence Report.

**Engineering Assistant, Vulnerability Assessment, San Luis Obispo County Flood Control and Water Conservation District, CA:** Developed a comparison of the Department of Water Resources (DWR) Water Shortage Vulnerability Tool and San Luis Obispo County Flood Control and Water Conservation District's (SLOCFCWCD) Regional Water Infrastructure Resiliency Plan (RWIRP) scoring metrics. Utilized each tool and available documentation to summarize key differences, variables/factors, and weight of each risk category for the tools.

**Engineering Assistant, Los Osos Basin Management Committee, CA:** Prepared summary of all meeting agendas from the Los Osos Basin Management Committee (BMC) Board of Directors Meetings from 2015 to present, providing an efficient tool to search for previous agenda items. Uploaded previous agendas and agenda packets to the BMC's Streamline website.