



## RANCHO MURIETA COMMUNITY SERVICES DISTRICT

15160 Jackson Road, Rancho Murieta, CA 95683

Office - 916-354-3700 \* Fax - 916-354-2082

### FINANCE COMMITTEE

*(Directors John Merchant and Tim Maybee)*

Regular Meeting

November 3, 2020 at 10:00 a.m.

**This meeting will be held via ZOOM** video conference only pursuant to Gov. Newsom Executive Order N-29-20. You can join the conference by (1) logging on to <https://us02web.zoom.us/j/843096699201>, entering Meeting ID no. 843 0966 9920, and using the audio on your computer, or (2) dialing into 1-669-900-9128 and entering the meeting code 843 0966 9920. Those wishing to join with audio only can simply call the telephone number above and enter the code. Participants wishing to join the call anonymously have the option of dialing \*67 from their phone. Please refer to your telephone service provider for specific instructions. **PLEASE NOTE – MOBILE DEVICE USERS MAY NEED TO INSTALL AN APP PRIOR TO USE AND MAC AND PC DESKTOP AND LAPTOP USES WILL REQUIRE YOU TO RUN A ZOOM INSTALLER APPLICATION – PLEASE FOLLOW DIRECTIONS AS PROVIDED BY ZOOM. IT IS RECOMMENDED YOU ATTEMPT TO LOGIN AT LEAST 5 MINUTES BEFORE THE START OF THE MEETING.**

### AGENDA

1. Call to Order
2. Comments from the Public
3. Water, Sewer and Drainage Detailed Budget Review
4. Discuss timing for Reorganization/Renegotiation of the 1988 Agreement Related to the CIA Ditch
5. Discuss SB-998 water meter shutoff notifications
6. Update Laguna Joaquin RFP
7. Discuss Timing for Reserve Study and Engineering Services RFP's
8. CFD 2014-1 delinquent bond payment disbursement summary
9. Payment to L H Schneider Construction for CIA Ditch, Lone Pine Drive culvert pipe repair

## **10. Review Security Service Opinion Survey RFQ**

## **11. Directors and Staff Comments/Suggestions**

## **12. Adjournment**

"In accordance with California Government Code Section 54957.5, any writing or document that is a public record, relates to an open session agenda item and is distributed less than 24 hours prior to a special meeting, will be made available for public inspection in the District offices during normal business hours. If, however, the document is not distributed until the regular meeting to which it relates, then the document or writing will be made available to the public at the location of the meeting."

In compliance with the Americans with Disabilities Act and Executive Order No. N-29-20, if you are an individual with a disability and you need a disability-related modification or accommodation to participate in this meeting or need assistance to participate in this teleconference meeting, please contact the District Office at 916-354-3700 or [awilder@rmcsd.com](mailto:awilder@rmcsd.com). Requests must be made as soon as possible.

Note: This agenda is posted pursuant to the provisions of the Government Code commencing at Section 54950. The date of this posting is October 30, 2020. Posting locations are: 1) District Office; 2) Post Office; 3) Rancho Murieta Association; 4) Murieta Village Association.

## MEMORANDUM

Date: November 02, 2020  
To: Finance Committee  
From: Cindy Chao, Controller  
Subject: New Format for Reporting Budget for all Funds

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### RECOMMENDED ACTION

Discuss with the Finance Committee the new report format for budget to actual monthly reporting for all budget units.

### BACKGROUND

The Finance Staff have applied the new format to all budget units of the District finances since the new format for Security budget was presented to the Finance Committee on Oct 2nd, 2020. In the new report format, columns remain the same as the current monthly budget to actual summary report and expenditures are separated as independent sections as below:

**Water** - Expenditure line items in Water are separated as independent sections by Source of Supply, Water Treatment, Water Transmission and Distribution and Administration.

**Sewer** - Expenditure line items in Sewer are separated as independent sections by Sewer Collection, Sewer Treatment and Disposal and Administration.

**Drainage and Solid Waste** - Expenditure line items in Drainage and Solid Waste are not separated as independent sections because historically there are no sub-unit/department in budget reporting in Drainage and Solid Waste.

**Administration** - The actual cost in admin fund is allocated to other funds and further to each sub-unit/department in other funds to explain the true administrative overhead in each fund and sub-unit/department. The percentage number used for sub-unit/department can be traced back to the published FY 20-21 budget. All Administrative funds are allocated to each operational department as published in the Cost Allocation Plan earlier this year.

The new format allows the readers to see the actual cost of each section in each service the District provides because we have added the monthly Administrative overhead by section.

The upgrade to this report is a result of the Finance Staff's better understanding of the District's finances and capacity of gathering and disseminating finance information to meet the reporting needs of the board and the community.

## MEMORANDUM

Date: 11/02/2020  
To: Finance Committee  
From: Tom Hennig, General Manager  
Subject: Policy P2020-01 - SB-998 Water Shutoff Notifications

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### RECOMMENDED ACTION

Review the sample of Policy P2020-01 which will create the District's Policy for Disconnection of Residential Water Service for Nonpayment.

### DISCUSSION

Senate Bill No. 998 requires an urban and community water system shall have a written policy on discontinuation of residential service for nonpayment available in English, the languages listed in Section 1632 of the Civil Code, and, any other language spoken by at least 10 percent of the people residing in its service area. The policy shall include all of the following:

1. A plan for deferred or reduced payments.
2. Alternative payment schedules.
3. A formal mechanism for a customer to contest or appeal a bill.
4. A telephone number for a customer to contact to discuss options for averting discontinuation of residential service for nonpayment.
5. The policy shall be available on the urban and community water system's Internet Web site, if an Internet Web site exists. If an Internet Web site does not exist, the urban and community water system shall provide the policy to customers in writing, upon request.

Staff, in conjunction with our Bartkiewicz, Kronick & Shanahan, our Legal Counsel have prepared Policy P2020-01 to bring the District into Compliance with the new law.

### ACTION

With the approval of the Finance Committee, the Draft Policy will be brought to the Board November 18, 2020.

# RANCHO MURIETA COMMUNITY SERVICES DISTRICT

<b>Category:</b>	Finance	<b>Policy #</b> P2020-01
<b>Title:</b>	Disconnection of Residential Water Service for Nonpayment	

## 1. General Provisions

a. Application. This Policy applies to the disconnection of residential water service for nonpayment. The District's existing ordinances, resolutions, policies, and procedures shall continue to apply to non-residential water service accounts and to disconnection of residential water service for other reasons, including the termination of a service connection by the District due to a customer violation of any other ordinance, rule, regulation, or policy of the District. In the event of any conflict between this Policy and any other ordinance, rule, regulation, or policy of the District, this Policy shall prevail. In the event of any conflict between this Policy and state law, state law shall prevail.

b. Customer Responsibility. Under applicable District ordinances, resolutions, policies, and procedures, bills for water service are rendered to each customer on a monthly basis and are due and payable upon presentation. Water service bills become delinquent if not paid within 60 days from the date on the bill. It is the customer's responsibility to ensure that payments are received at the District office in a timely manner. Payment may be made at the District office, by electronic funds transfer (EFT), or to the address for remittance of mailed payments.

c. Availability of Policy. The District shall provide this Policy and all written notices given under this Policy in English, Spanish, Chinese, Tagalog, Vietnamese, and Korean, and in any other language spoken by at least 10 percent of the people residing in the District's service area or required by Civil Code section 1632. This Policy shall be posted and maintained on the District's Internet website.

d. Contact Telephone Number. The District Billing Department can be reached at 916-354-3700 for assistance concerning the payment of water bills and to discuss options for stopping disconnection of residential service for nonpayment.

## 2. Disconnection of Residential Water Service for Nonpayment

a. 60-day Delinquency Period. The District shall not disconnect residential water service for nonpayment of a service bill until a customer's payment has been delinquent for 60 days.

b. 10-Day Notice. Not less than 10 days before disconnection of residential service for nonpayment, the District shall contact the customer named on the account by telephone or written notice. If payment in full is not received within 7 days, or the District has otherwise not

been contacted and an alternative Payment Arrangement agreed upon, as discussed in section 4 of this Policy, the customers will receive a 3-day notice on their door, informing them that service will be disconnected 3 days later.

i. When the District contacts the customer named on the account by written notice under this section, the written notice of payment delinquency and impending disconnection shall be mailed to the customer of the residence to which the residential service is provided. If the customer's address is not the address of the property to which residential service is provided, the notice shall also be sent to the address of the property to which residential service is provided, addressed to "Occupant."

ii. The written notice shall include all of the following information in a clear and legible format:

1. The customer's name and address.
2. The amount of the current charges and delinquency.
3. The date and time by which payment must be made in order to avoid disconnection of water service.
4. A description of the process to apply for an extension of time to pay the delinquent charges.
5. A description of the procedure by which the customer may petition for bill review and appeal or initiate a complaint or request an investigation concerning the service or charges.
6. A description of the procedure by which the customer may request a deferred, reduced, or alternative payment schedule, including an amortization of the delinquent residential service charges, consistent with this Policy.
7. The District's telephone number and business address.

iii. If the written notice is returned through the mail as undeliverable, the District shall make a good faith effort to visit the residence and leave or place in a conspicuous place a notice of imminent disconnection of residential service for nonpayment.

c. 3-Day Posting Notice. The District shall give by posting in a conspicuous location at the premises, a notice of termination of service, at least 3 days prior to termination. This notice of termination of service shall include all of the following information:

- i. The customer's name and address.
- ii. The amount of the current charges and delinquency.

iii. The date and time by which payment is required in order to avoid termination.

iv. The District's telephone number.

d. Service Restoration Information. Upon disconnection, the District shall provide the customer with the District phone number for information on how to restore residential service.

### **3. Restrictions on Disconnection of Water Service**

a. The District shall not disconnect residential water service for nonpayment of a service bill until a customer's payment has been delinquent for 60 days.

b. The District shall not disconnect residential service in any of the following situations:

i. When a customer has been granted an extension of the period for payment of a bill.

ii. During the time that the District is investigating a customer dispute or complaint under section 8 of this Policy.

iii. When State or Federal orders prohibit the shutting off of residential water meters due to non-payment.

c. The District shall not disconnect residential service if all of the following conditions are met:

i. The customer, or a tenant of the customer, submits to the District the certification of a primary care provider, as defined in section 14088(b)(1)(A) of the Welfare and Institutions Code, that disconnection of residential service will be life threatening to, or pose a serious threat to the health and safety of, a resident of the property receiving service.

ii. The customer demonstrates that he or she is financially unable to pay for residential service within the urban and community water system's normal billing cycle. The customer shall be deemed financially unable to pay for residential service within the urban and community water system's normal billing cycle if (1) any member of the customer's household is a current recipient of CalWORKs, CalFresh, general assistance, Medi-Cal, Supplemental Security Income/State Supplementary Payment Program, or California Special Supplemental Nutrition Program for Women, Infants, and Children, or (2) the customer declares that the household's annual income is less than 200 percent of the federal poverty level.

iii. The customer is willing to enter into an alternative payment arrangement, consistent with the provisions of Section 4 of this Policy.

If a customer meets the three conditions listed in this subsection (c), the District shall offer the customer one or more of the payment options described in Section 4. Any customer meeting these requirements shall, upon request, be permitted to amortize, over a period not to exceed 12 months, the unpaid balance of any bill asserted to be beyond the means of the customer to pay within the normal period for payment.

d. The District is prohibited from terminating water service to any customer or tenant of a customer on any Saturday, Sunday, legal holiday, or outside of its normal operating hours.

#### **4. Alternative Payment Arrangements**

a. Options. Upon request, the District will consider the following options with a delinquent customer to avert discontinuation of residential service for nonpayment:

- i. Amortization of the unpaid balance;
- ii. Participation in an alternative payment schedule;
- iii. Temporary deferral of payment.

(Collectively "Payment Arrangements.")

b. District Administration. The District General Manager, or his or her designee, may choose which of the Payment Arrangements described in Section 4(a), above, may be available to the customer and may set the parameters of that payment option. Ordinarily, the Payment Arrangement offered should result in payment of any remaining outstanding balance within 12 months. The District may grant a longer payment period if it finds the longer period is necessary to avoid undue hardship to the customer based on the circumstances of the individual case. The District may charge an administrative fee for the cost of administering Payment Arrangements under this provision. The General Manager, or his or her designee, is authorized to prepare and approve a Payment Arrangement agreement with a customer consistent with this Section 4.

c. Customer Obligations. If the District and customer enter into a Payment Arrangement under this Section 4, the customer shall comply with the agreement or other arrangement and remain current on any new water service charges as they are billed in each subsequent billing period. The customer may not request further amortization or reduction of any unpaid charges on subsequent bills while paying delinquent charges under an alternative payment arrangement. Commencing on the date the first payment arrangement is entered into, customers who fail to comply with any agreed payment arrangement will not be eligible to establish future payment arrangements for a period of 24 months, except as otherwise prohibited by law.



## 5. Disconnection After Failure to Comply with Alternative Payment Arrangements

a. If the District and customer enter into any Payment Arrangement under Section 4, the District may disconnect service no sooner than 5 business days after the District posts a final notice of intent to disconnect service in a prominent and conspicuous location at the property under either of the following circumstances:

- i. The customer fails to comply with the Payment Arrangement for 60 days or more.
- ii. While undertaking a Payment Arrangement, the customer does not pay his or her current residential service charges for 60 days or more.

b. The notice of termination under this Section 5 shall include all of the following information:

- i. The customer's name and address.
- ii. Notice of the customer's noncompliance with the Payment Arrangement.
- iii. The Payment Arrangement or other conditions the customer must satisfy in order to avoid termination.
- iv. The District's telephone number and business address.

This notice does not entitle the customer to further investigation or provision of alternative payment arrangements by the District.

## 6. Disconnection in Master Meter Landlord-Tenant Situations

a. Applicability. This section applies to District service through an individual meter to a detached single-family dwelling, a multi-unit residential structure, mobile home park, or permanent residential structure in a labor camp, only if the owner, manager or operator is the customer of record, and there is a landlord-tenant relationship between the residential occupants and the owner, manager, or operator of the building.

b. Notice. The District shall make every good faith effort to inform the residential occupants, by means of written notice, when the account is in arrears that service will be terminated at least 10 days prior to the termination. This notice shall further inform the residential occupants that they have the right to become District customers, to whom the service will then be billed, without being required to pay any amount which may then be due on the delinquent account.

c. Service to Occupants. The District is not required to make service available to the residential occupants unless each residential occupant agrees to the terms and conditions of District water service and meets the requirements of law and the District's ordinances, rules,

regulations, and policies. However, if one or more of the residential occupants are willing and able to assume responsibility for the subsequent charges to the account to the satisfaction of the District, or if there is a physical means legally available to the District of selectively terminating service to those residential occupants who have not met the requirements of the District's ordinances, rules, regulations, and policies, the District shall make service available to those residential occupants who have met those requirements.

d. Proof of Credit. If prior service for a period of time is a condition for establishing credit with the District, residence and proof of prompt payment of rent or other credit obligation acceptable to the District for that period of time is a satisfactory equivalent.

e. Detached Single-Family Dwellings. In the case of a detached single-family dwelling, the District may do any of the following:

i. Give notice of termination at least seven days prior to the proposed termination.

ii. In order for the amount due on the delinquent account to be waived, require an occupant who becomes a customer to verify that the delinquent account customer of record is or was the landlord, manager, or agent of the dwelling.

## **7. Additional Considerations for Financial Hardship**

a. If a customer who demonstrates to the District household income below 200 percent of the federal poverty line, the District shall both:

i. Set a reconnection of service fees for reconnection during normal operating hours at \$50 and for reconnection during nonoperational hours at \$150. These fees shall not exceed the actual cost of reconnection if those costs are less. Reconnection fees shall be subject to an annual adjustment for changes in the Consumer Price Index beginning January 1, 2021.

ii. Waive interest charges on delinquent bills once every 12 months.

b. The District shall deem a residential customer to have a household income below 200 percent of the federal poverty line if:

i. Any member of the household is a current recipient of CalWORKs, CalFresh, general assistance, Medi-Cal, Supplemental Security Income/State Supplementary Payment Program, or California Special Supplemental Nutrition Program for Women, Infants, and Children, or

ii. The customer declares that the household's annual income is less than 200 percent of the federal poverty level.

## 8. Procedure to Contest or Appeal a Bill

A customer may appeal or contest the amount set forth in any bill for residential water service pursuant to the following procedure:

a. General Appeal. Within five days of receipt of the bill for water service, a customer has a right to request an appeal or review of any bill or charge rendered by the District. The request must be made in writing and be delivered to the District's office. For so long as the customer's appeal and any resulting investigation is pending, the District cannot disconnect water service to the customer.

b. 10-Day Notice Appeal. In addition to the appeal rights under subsection (a), above, a customer who receives a 10-Day Notice described in Section 2(c) of this Policy may request an appeal or review of the bill to which the notice relates within five business days of the date of the notice. However, no such appeal or review rights shall apply to any bill for which an appeal or request for review under subsection (a) above, has been made. Any appeal or request for review under this subsection must be in writing and must include documentation supporting the appeal or the reason for the review. The request for an appeal must be delivered to the District's office within the five-day period. For so long as the customer's appeal and any resulting investigation is pending, the District cannot disconnect water service to the customer.

c. Appeal Process.

i. Following receipt of a request for an appeal or review under subsections (a) or (b), above, the District's General Manager, or his or her designee, shall evaluate the request for review and supporting material provided by the customer and the information on file with the District concerning the water charges in question. Within 10 days after receipt of the customer's request for review, the General Manager, or his or her designee, shall render a decision as to the accuracy of the water charges set forth on the bill and shall provide the appealing customer with a brief written summary of the decision.

ii. If water charges are determined to be incorrect, the District will provide a corrected invoice and payment of the revised charges will be due within 10 calendar days of the invoice date for revised charges. If the revised charges remain unpaid for more than 60 calendar days after the corrected invoice is provided, water service will be disconnected. Prior to disconnection, the District shall provide the customer with the 10-Day Notice in accordance with Section 2(c), above. Water service will only be restored upon full payment of all outstanding water charges, penalties, interest, and any applicable reconnection charges.

iii. If the water charges in question are determined to be correct, the water charges are due and payable within three business days after receipt of the General Manager's, or his or her designee's, decision.

d. Any overcharges due from the District will be reflected as a credit on the next regular bill to the customer, or refunded directly to the customer, at the sole discretion of the General Manager.

e. Water service to any customer shall not be disconnected at any time during which the customer's appeal to the General Manager is pending.

<b>Approved by Rancho Murieta Community Services District's Board of Directors</b>	
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DRAFT

8 – CFD 2014-1 Delinquent Bond  
Disbursement Summary - Pending

## MEMORANDUM

Date: October 30, 2020  
To: Finance Committee  
From: Tom Hennig, General Manager  
Subject: Reimbursement to L.H. Schneider Construction for Cosumnes Irrigation Association (CIA) Ditch Culvert Pipeline Repair at Lone Pine Drive

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### RECOMMENDED ACTIONS

Direct the General Manager to issue a payment in the amount of \$27,907.80, to L.H. Schneider Construction and the CIA checking account to reimburse costs associated with the CIA Ditch culvert pipe under Lone Pine Drive.

### BACKGROUND

The District is a 35.4% member of the CIA. The estimate for the District's share of the repair was \$38,000. The District's obligation to the CIA is to maintain and repair the CIA Ditch. During the preparation of the FY 2020-21 budget, there was a request from the primary owners of the CIA Ditch for the District to contribute its share of funds to repair the culvert pipe of the CIA Ditch, under Lone Pine Drive. If left unrepaired, the failing culvert pipe would eventually result in erosion, which would cause the affected part of Lone Pine Drive to collapse.

### DISCUSSION

L.H. Schneider Construction was hired by the CIA to replace the culvert pipe. On September 21, 2020 we received an invoice from the CIA Accounting for \$27,907.80. This invoice included the amount of the District's obligation, less \$2,030.50, for the use of District owned equipment during the repair. Since the total cost of the repairs exceeded the General Manager's \$25,000 authority, we are required to gain Board approval for the expense.

At the request of the CIA, L.H. Schneider Construction was issued a check from the CIA checking account in the amount of \$13,500 to allow for a partial payment during the time it has taken to bring this item to the Finance Committee. The amount of \$14,407.80 is the remaining balance after the payment from the CIA account. Approval from the Board to pay the \$27,907.80 will be made in checks to the CIA and L.H. Schneider Construction.

### SUMMARY

Based on the discussion and approval from the Finance Committee, this item will be included in the packet for the November 18, 2020 Board meeting.

## MEMORANDUM

Date: 10/30/2020  
To: Finance Committee  
From: Tom Hennig, General Manager  
Subject: RFQ Update – Security Service Opinion Poll

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### RECOMMENDED ACTION

Inform the Finance Committee of the final plans to release a Request for Quotes for Consulting Services to conduct an Opinion Poll of the residents, landowners, and businesses within the Rancho Murieta CSD Boundaries.

### DISCUSSION

We have prepared a Request for Quote, Exhibit A, to establish a plan to conduct a Community Opinion Survey regarding Security Services. This poll will be to survey Rancho Murieta residents, landowners, and businesses, to determine the potential for replacing or supplementing Measure J, which was passed by the voters in 1998. With the approval from the Finance Committee, we will release the RFQ this week. The goal is to award the contract in December, 2020 and conduct the poll in February, 2021. Once awarded, the consultant will establish a schedule to include the following phases.

#### Phase 1: Planning and Design

- Kick-off meeting/confirmation of research needs and goals
- Review background materials, demographics and key stakeholders
- Meetings/workshops with stakeholder groups
- Develop a survey questionnaire
- Prepare data collection instrument
- Identify population and sampling parameters
- Test the survey questionnaire

#### Phase 2: Survey the Community

- Ensure participation reflects community demographics
- Finalize the target population, invite participation
- Conduct the survey (phone interviews, online – optimal media to be proposed)
- Monitor progress, identify and address issues
- Populate the data collection instrument

#### Phase 3: Analyze and Report the Results

- Tabulate the direct responses
- Cross-tabulate results, variables
- Perform statistical analysis
- Identify key findings, conclusions, and recommendations
- Draft final report, with summary
- Deliver findings to District; present to Board

A key component of the first phase of this project will be to hold stakeholder meetings with the various groups within the District. The polling company will need to establish the survey questions to meet the perceived needs of the community. This phase is expected to take two to four weeks.

## **SUMMARY**

With the approval of the Finance Committee, the RFQ will be released to the public this week. The RFQ response deadline will be Wednesday, November 25. If successful, this item will be placed on the December 2, 20 Finance Committee agenda. If necessary, we will present the contract for approval at the December 16, 20202020 Board meeting. The list below is the current estimate for the timing of events.

1. Receive RFQ responses – November 25, 2020
2. Report results and recommendation to Finance Committee – December 2, 2020
3. If necessary, request approval to award contract at the December 16, 2020 Board Meeting
4. Begin project with Stakeholder meetings in January 2021
5. Conduct polling activities in February 2021
6. Present polling results to Finance Committee on April 6, 2021
7. Presentation to the Board on April 21, 2021
8. Possible voter referendum in June 2021





# **Rancho Murieta CSD**

Community Services District

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REQUEST FOR QUOTE:

Conduct a  
COMMUNITY OPINION SURVEY  
Regarding  
SECURITY SERVICES

RANCHO MURIETA  
COMMUNITY SERVICES DISTRICT

District Contact:  
Tom Hennig  
General Manager

Responses Due By:  
November 25, 2020  
At 5:00 p.m.

**RANCHO MURIETA COMMUNITY SERVICES DISTRICT  
REQUEST FOR QUOTE (RFQ)  
COMMUNITY OPINION SURVEY: SECURITY SERVICES**

**I. INTRODUCTION**

Rancho Murieta Community Services District (the District, or RMCS D) is requesting proposals, including a price quote, from firms qualified to conduct a public opinion poll of the District's residents. Work on this initiative is expected to begin in December 2020 and be completed in April 2021. The District reserves the right to reject all quotes and to waive any informality.

The District is the only special district in California to provide in-house, 24/7 security services to its community. To best serve the community, the District is reviewing the elements and level of the security services it presently provides, with an eye to future improvements. The purpose of this survey is to clearly understand the community's awareness, perceptions, and priorities for such safety services.

The District will not reimburse responding firms for any expenses incurred in preparing responses to this RFQ.

Any inquiries concerning this request for quotes should be addressed to Tom Hennig, General Manager, via email at [thennig@rmcsd.com](mailto:thennig@rmcsd.com).

**II. BACKGROUND**

**A. The Rancho Murieta Community**

Rancho Murieta Community Services District (the District, or RMCS D) was formed in 1982 by State Government Code 61000 to provide essential services in Rancho Murieta. The District provides essential services to an area of 3,500 acres (covering roughly five and a half square miles) located on the Cosumnes River in the rolling hills of eastern Sacramento County. The approved master plan calls for residential development on 1,920 acres with single-family residences, townhouses, apartments, and mobile homes for a total of 5,189 units. Current estimates indicate Rancho Murieta has about 2,700 households with a population of roughly 6,000 persons. The community is a balanced blend of both custom and production homes, townhouses, mobile homes, and a growing commercial complex that includes a hotel and spa, airport, grocery store, restaurants and retail outlets, office building, fire station, and a premier equestrian center.

The Community Services District is an independent Special District which provides the following services:

- Water supply collection, treatment, and distribution
- Wastewater collection, treatment, and reuse
- Storm drainage collection, disposal, and flood control
- Security
- Solid Waste collection

While each service maintains and operates under its own separate budget, a combination of taxes, special taxes, and user fees fund these services.

As noted above, RMCS D is somewhat unique as the only special district in California to provide in-house, 24/7 security services to its community. The District is determined to deliver superior community services – efficiently, professionally, and at a reasonable cost - while responding to and sustaining the enhanced quality of life the community desires. Information about the Rancho Murieta community and the fiscal situation of the District is available on the District website at <https://www.rmcsd.com>.

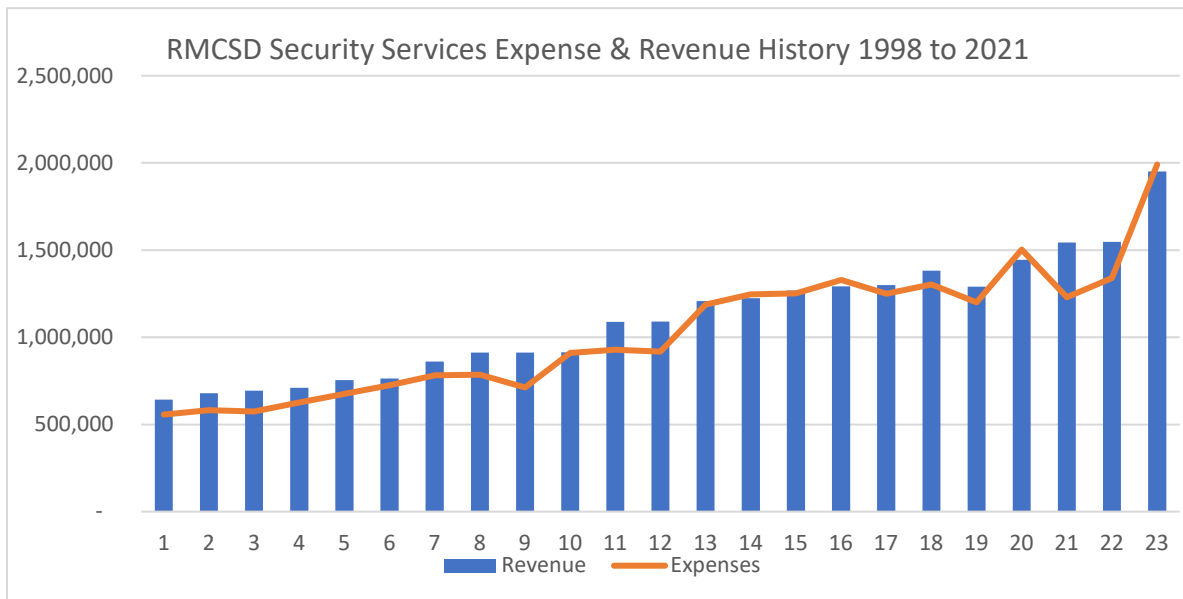
## **B. Security Services at Rancho Murieta**

Two of the most important reasons for living in Rancho Murieta are the privacy and Security it provides. All residents and commercial entities benefit from 24-hour patrol, seven days a week. Most of the residential property is gated and surrounds two world-class golf courses. Entrances into the private residential areas – one gate each for the North and South areas - are staffed 24 hours a day while providing automated access lanes for residents with barcodes on their vehicles.

Security services at Rancho Murieta are funded by a Special Tax, approved by the voters as Measure J in 1998. Measure J established methods for setting monthly rates for security services based on the nature of the property: residential, commercial, and undeveloped properties. The baseline level of service was established as two (2) gate officers and one (1) patrol officer working 24/7/365. Initially, the base-year rates provided sufficient funds to support these around-the-clock operations. During the first few years, rates were set below the maximum allowed due to lower budgetary needs. Roughly ten years later, the rates were increased to keep up with the rising costs. Since 2010, costs have risen and surpassed the rate increases allowed by Measure J.

To address this budgeted shortfall, the District has been supplementing the special tax revenue with general-purpose property tax revenue. This practice became necessary as the cost of security services has outpaced revenue growth (see chart below). For fiscal year 2020-21, the District has allocated sixty-five percent (65%) of property tax revenue to support Security. Without a significant change in the level of services or an influx of

new ratepayers, the District cannot sustain the practice of spending property taxes on Security.



In light of these budgetary concerns, as well as other issues and the need for continuous improvement, the District leadership has decided to conduct a voter opinion survey to assess voter awareness, perceptions, and priorities for the District’s public safety services.

Since 1998 the District and the Rancho Murieta Homeowners Association (RMA), have surveyed the community several times regarding Security. While some of these efforts have lacked clear and statistically valid results - including a 2016-18 effort to add security cameras – what is clear is that the community generally appreciates the level of Security provided, and would enjoy an even higher level of service, but is reticent to pay significantly more. The goal of this proposed survey is to allow the District identify how, and at what level, it should provide security services, both now and into the future.

The community has grown significantly since 1998, in terms of both residential customers and commercial additions. Recent additions include the Murieta Inn & Spa and, a few months ago, a top-end grocery store to complement the smaller retail entities continuing in operation. As such, the community’s overall security profile and security needs continue to change.

### III. SCOPE OF WORK

As noted above, the goal of this effort is to identify the components and level of security service appropriate for this community, now and into the future. The District is seeking a firm that will, with the support of District staff, design, conduct, analyze, and report the results of a survey that will clearly identify the community’s opinion of its security

services. Without dictating a specific approach or methodology, the District anticipates a program including some combination of online/internet, email, telephone, and in-person data collection. What follows is an anticipated project schedule. Respondents to this RFQ should feel free to comment, adjust, or simplify this plan as part of their response.

**Phase 1: Planning and Design**

- Kick-off meeting/confirmation of research needs and goals
- Review background materials, demographics and key stakeholders
- Meetings/workshops with stakeholder groups
- Develop a survey questionnaire
- Prepare data collection instrument
- Identify population and sampling parameters
- Test the survey questionnaire

**Phase 2: Survey the Community**

- Ensure participation reflects community demographics
- Finalize the target population, invite participation
- Conduct the survey (phone interviews, online – optimal media to be proposed)
- Monitor progress, identify and address issues
- Populate the data collection instrument

**Phase 3: Analyze and Report the Results**

- Tabulate the direct responses
- Cross-tabulate results, variables
- Perform statistical analysis
- Identify key findings, conclusions, and recommendations
- Draft final report, with Summary
- Deliver findings to District; present to Board

**IV. PROJECT SCHEDULE**

Key project dates include:

DATE	TASK
November 5, 2020	RFQ published
November 25, 2020	Receive responses
December 2020	Evaluation and selection
January 2021	Planning and Design
February 2021	Survey the Community
April 2, 2021	Deliver Final Report for Finance Committee
April 21, 2021	Present to Board, w/ Discussion of Next Steps

The dates in this RFQ are subject to change at the District's discretion. Key drivers include work with the Board of Directors and the voting calendar, as future actions may require community vote in 2021. You may contact Tom Hennig, General Manager at [thennig@rmcsd.com](mailto:thennig@rmcsd.com) with any questions related to the timing of this RFQ.

## V. KEY DELIVERABLES & DISTRICT ASSISTANCE PROVIDED

### A. Deliverables

Contract deliverables include:

- Design, schedule, and conduct stakeholder workshops to include the following groups:
  - North and South gated residential owners (2,600 owners)
  - Murieta Village and Murieta Gardens II residential owners (270 owners)
  - Undeveloped landowners (less than 10)
  - Commercial businesses (between 20 to 30)
- A Final Report, in PDF format (preferred) or MS Word, which includes:
  - Survey questionnaire (final version) and face-value results
  - Verbatim responses to open-ended questions (if any)
  - A thorough analysis of survey results
  - Findings and Conclusions
  - Actionable Recommendations
- A Summary of Survey Findings, Conclusions, and Recommendations (PowerPoint format)

### B. Administrative Support

The District will provide contact information related to community members as available and appropriate, including:

- Resident addresses, email, and phone number
- Key representatives and stakeholders, including meeting space if required
- Other available data as requested
- Copies of previous surveys (also available at [RMCSd.com](http://RMCSd.com))

It is expected that most work by the survey firm will be completed off-site. The District may be able to provide office space as a base, as needed, while the stakeholder meetings are being performed.

### C. Report Preparation

Preparation, editing, printing, and delivery of the Final Report and Summary Report are the responsibility of the survey firm.

## VI. RESPONSE REQUIREMENTS

### A. General Requirements

**1. Inquiries** concerning the RFQ and the subject of the RFQ shall be made to:

Amelia Wilder  
District Secretary  
P.O. Box 1050  
Rancho Murieta, CA 95683  
916 354 3700  
[awilder@rmcsd.com](mailto:awilder@rmcsd.com)

### 2. Response Submission.

One (1) electronic copy of the Response shall be received by the District by 5 PM, on November 25, 2020, for your submission to be considered. Email your response to: [awilder@rmcsd.com](mailto:awilder@rmcsd.com)

The District reserves the right to request additional information or clarification from Respondents to allow for corrections of errors or omissions or to negotiate terms. The District reserves the right to retain all submissions and to use any idea(s) in a response regardless of whether that responding firm is selected. Submission indicates acceptance by the firm of the conditions contained in this request for quotes, unless clearly and specifically noted in the response, and confirmed in the contract between the District and the firm selected.

The District reserves the right to reject any or all responses, to waive any non-material irregularities or information in any response, and to accept, negotiate, or reject any items or combination of items.

### B. Response Format

1. **Title Page** showing the RFQ subject; the firm's name; the name, address and telephone number, and email address of a contact person, along with the date of the response.
2. **Table of Contents** identifying the materials submitted.
3. **Signed Transmittal/Cover Letter** briefly stating the proposers' understanding of the work to be done; the commitment to performing the work within the time period; the name(s) of the person(s) authorized to represent the Respondent.

4. **Detailed content** as outlined in the next section.

## **C. Response Contents**

### **1. Firm Qualifications and Experience**

To qualify, the firm must have experience conducting community surveys or public opinion polls, including:

- Customizing survey programs according to the target population
- Intelligent questionnaire design to ensure clear results and avoid common pitfalls
- Statistical analysis of collected data
- Developing findings, conclusions, and recommendations - what the results *mean*

The Respondent should state the size of the firm, the location of the office where work on this engagement is to be performed, and the number and nature of the professional staff to be employed in this engagement.

### **2. Professional Staff Qualifications and Experience**

Briefly identify how the firm proposes to staff and manage this endeavor. Discuss how the firm ensures quality, error-free work. Provide information on the qualifications, experience and training of the specific staff to be assigned to this engagement.

### **3. Similar Surveys for Comparable Communities**

Please provide evidence of similar work – community surveys – conducted for entities comparable to Rancho Murieta, and experience with Security Surveys. Provide a brief description of how your firm managed the project, issues encountered and how they were resolved, how you worked with the client, general results, and how those results were ultimately presented. Sample final reports may be included as an appendix to your response. Online links to the client’s publication of your work are also allowed.

Please provide a list of three (3) client references for whom services such as those requested in this RFQ have been provided. Please provide the name of the organization, dates for which the services were provided, the nature of the work provided, and the name, address and telephone number of that client’s responsible person. The District reserves the right to contact any or all of the listed references regarding the work performed by the Respondent.

### **4. Proposed Survey Approach**



Your response should propose a simple work plan that supports successful completion of the requested deliverables. To ensure a fair evaluation, respondents should include the following information in their discussion of their proposed survey approach:

- Research Methodology
- Work Plan and Schedule
- Use of Objective and Subjective Queries
- Data Collection Approach and Process
- Sample Size, Composition, Proposed Margin of Error
- Questionnaire Length and/or Time to Complete
- Data Management Tools and Process
- Proposed Adjustments to RFQ Requirements (if any)

#### **5. Cost**

Please provide your total and final cost to address the requirements of this RFQ, including provision of all deliverables, as a not-to-exceed amount.

### **VII. EVALUATION PROCEDURES**

#### **A. Review of Responses**

District Staff, consisting at a minimum of the following, will evaluate submitted responses:

- General Manager or Designee
- Controller
- Accounting Supervisor
- Consultant(s)

#### **B. Evaluation Criteria**

Responses will be evaluated on three criteria:

1. Firm qualifications, proposed staff, professionalism, and equivalent experience;
2. Proposed Approach, and work for similar clients that demonstrates:
  - A reasonable approach likely to deliver the desired results
  - Thorough data collection and analysis
  - Clear communication
  - Insight and creativity
  - Successful voter outcomes
  - Application to the Rancho Murieta environment;

### 3. Cost.