



**BEAUMONT-CHERRY VALLEY WATER DISTRICT**  
560 Magnolia Avenue, Beaumont, CA 92223

**NOTICE AND AGENDA  
MEETING OF THE PERSONNEL COMMITTEE**

*This meeting is hereby noticed pursuant to  
California Government Code Section 54950 et. seq.*

**Tuesday, June 17, 2025 - 4:30 p.m.**  
**560 Magnolia Avenue, Beaumont, CA 92223**

**TELECONFERENCE NOTICE**

*The BCVWD Personnel Committee members will attend in person at the  
BCVWD Administrative Office*

*This meeting is available to the public via Zoom teleconference*

*To access the Zoom conference, use the link below:*

<https://us02web.zoom.us/j/85792068838?pwd=cFArZHZ4aHRsUmJLeTBCZVpnUGRmdz09>

**To telephone in, please dial: (669) 900-9128**  
**Enter Meeting ID: 857 9206 8838 • Enter Passcode: 457586**

*For Public Comment, use the “**Raise Hand**” feature if on  
the video call when prompted. If dialing in, please **dial \*9 to**  
“**Raise Hand**” when prompted*

*Meeting materials will be available on the BCVWD’s website:*

<https://bcvwd.gov/document-category/personnel-committee-agendas/>

**PERSONNEL COMMITTEE MEETING – JUNE 17, 2025**

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**Call to Order: Chair Covington**

**Roll Call**

	<b>John Covington, Chair</b>
	<b>Lona Williams</b>

	<b>Andy Ramirez (alternate)</b>
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## PERSONNEL COMMITTEE MEETING – JUNE 17, 2025 - *continued*

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### Public Comment

**PUBLIC COMMENT: RAISE HAND OR PRESS \*9 to request to speak when prompted. If you are present in the Conference Room, please fill out a Request to Speak card and deliver it to the Recording Secretary.**

At this time, any person may address the Committee on matters within its jurisdiction. However, state law prohibits the Committee from discussing or taking action on any item not listed on the agenda. Any non-agenda matters that require action will be referred to Staff for a report and possible action at a subsequent meeting.

**Please limit your comments to three minutes.** Sharing or passing time to another speaker is not permitted.

1. **Adjustments to the Agenda:** In accordance with Government Code Section 54954.2, additions to the agenda require a unanimous vote of the legislative body members present, which makes the determination that there is a need to take action, and the need to take action arose after the posting of the agenda.
  - a. Item(s) to be removed or continued from the Agenda
  - b. Emergency Item(s) to be added to the Agenda
  - c. Changes to the order of the Agenda

### ACTION ITEMS

2. **Acceptance of Personnel Committee Meeting minutes**

*Minutes may be accepted by consensus*

- a. May 20, 2025 Regular Meeting (pages 4 - 7)

3. **Report / Update from BCVWD Employees Association** (no staff report)

Association Representatives		
Andrew Becerra	Luis Lomeli	Ericka Enriquez

4. **Report / Update from BCVWD Exempt Employees** (no staff report)

5. **Human Resources Department Report** (pages 8 - 9)

6. **Policies and Procedures Manual Updates / Revisions**

a.	Policy 3030	Gift Acceptance Guidelines	pages 10 - 32
b.	Policy 7009	Drone Usage	pages 33 - 39
c.	Policy 7010	Electronic Signature	pages 40 - 61
d.	Policy 7012	Accessibility	pages 62 - 75

## PERSONNEL COMMITTEE MEETING – JUNE 17, 2025 - *continued*

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7. **Update on Policy Tracking Matrix** (pages 76 - 81)
  - a. Status of Policy Revisions / Updates
8. **Emergency Response Plan (ERP) – Joint Revision by Human Resources Division and Operations Department** (pages 83 - 139)
9. **Revising the District's Organization Chart and Salary Schedule** (pages 140 -149)
10. **Update: BCVWD 2026 Operational Budget Timeline** (pages 150 - 151)
11. **Action List for Future Meetings**
  - Employee Association topics
  - Policy manual updates (ongoing)
  - Update on driver incidents / training
12. **Next Meeting Date: July 15, 2025**
13. **Adjournment**

### NOTICES

**AVAILABILITY OF AGENDA MATERIALS** - Agenda exhibits and other writings that are disclosable public records distributed to all or a majority of the members of the Beaumont-Cherry Valley Water District Personnel Committee in connection with a matter subject to discussion or consideration at an open meeting of the Committee are available for public inspection in the District's office, at 560 Magnolia Avenue, Beaumont, California ("District Office") during business hours, Monday through Thursday from 7:30 a.m. to 5 p.m. If such writings are distributed to members of the Board less than 72 hours prior to the meeting, they will be available from the District Office at the same time or within 24 hours' time as they are distributed to Board Members, except that if such writings are distributed one hour prior to, or during the meeting, they can be made available in the Board Room at the District Office. Materials may also be available on the District's website: <https://bcvwd.gov/>. (GC 54957.5)

**REVISIONS TO THE AGENDA** - In accordance with §54954.2(a) of the Government Code (Brown Act), revisions to this Agenda may be made up to 72 hours before the Meeting, if necessary, after mailings are completed. Interested persons wishing to receive a copy of the set Agenda may pick one up at the District's Main Office, located at 560 Magnolia Avenue, Beaumont, California, up to 72 hours prior to the Committee Meeting.

**REQUIREMENTS RE: DISABLED ACCESS** - In accordance with Government Code §54954.2(a), and the Americans with Disabilities Act (ADA), requests for a disability related modification or accommodation, including auxiliary aids or services, in order to attend or participate in a meeting, should be made to the District Office. Notification of at least 48 hours in advance of the meeting will generally enable staff to make reasonable arrangements to ensure accessibility. The Office may be contacted by telephone at (951) 845-9581, email at [info@bcvwd.gov](mailto:info@bcvwd.gov) or in writing at the Beaumont-Cherry Valley Water District, 560 Magnolia Avenue, Beaumont, California 92223.

**CERTIFICATION OF POSTING:** A copy of the foregoing notice was posted near the regular meeting place of the Personnel Committee of Beaumont-Cherry Valley Water District and to its website at least 72 hours in advance of the meeting (Government Code §54954.2(a)).

## Item 2



### BEAUMONT-CHERRY VALLEY WATER DISTRICT AGENDA 560 Magnolia Avenue, Beaumont, CA 92223

#### MINUTES OF THE PERSONNEL COMMITTEE MEETING Tuesday, May 20, 2025, at 4:30 p.m.

#### CALL TO ORDER

*Chair Covington called the meeting to order at 4:40 p.m.*

#### ROLL CALL

<i>Directors present:</i>	<i>John Covington, Lona Williams</i>
<i>Directors absent:</i>	<i>None</i>
<i>Staff present:</i>	<i>General Manager Dan Jagers Director of Finance and Administration Sylvia Molina Director of Information Technology Robert Rasha Human Resources Manager Ren Berioso Executive Assistant Lynda Kerney</i>
<i>BCVWD Employee Association reps:</i>	<i>Ericka Enriquez, Luis Lomeli, Andrew Becerra</i>
<i>Members of the Public:</i>	<i>None</i>

**PUBLIC COMMENT:** None.

#### ACTION ITEMS

- 1. Adjustments to the Agenda:** Human Resources Manager Ren Berioso identified a handout.
- 2. Acceptance of Personnel Committee Meeting minutes**
  - March 18, 2025 Regular Meeting
  - April 15, 2025 Regular Meeting

*The Committee accepted the meeting minutes by the following vote:*

MOVED: Williams	SECONDED: Covington	APPROVED
AYES:	Covington, Williams	
NOES:	None.	
ABSTAIN:	None.	
ABSENT:	None.	



**3. Report / Update from BCVWD Employees Association:** Employee Association representative Andrew Becerra reported that heat illness prevention procedures were in place due to the hot weather, including water replenishment, and a buddy system. Director Covington asked about heat illness training and the inclusion in the Illness and Injury Prevention Program (IIPP) and Mr. Berioso indicated it is an internal HR training from the American Water Works Association (AWWA) and satisfies the Occupational Safety and Health Administration (OSHA) requirements. Heat illness is also covered in the Emergency Response Committee meetings.

**4. Report / Update from BCVWD Exempt Employees:** None.

**5. Report from Human Resources Department**

Human Resources Manager Ren Berioso presented highlights of the report:

- Currently 48 employees
- Two new hires
- Notable anniversaries including Mike Munoz (20 years), Julian Herrera (18 years), and Sylvia Molina (13 years)
- An Engineering Intern position has been posted

The Committee offered congratulations to the new hires.

**6. Policies and Procedures Manual Updates / Revisions**

Human Resources Manager Ren Berioso presented the proposed revisions to the following policies:

a.	Policy 7007	Remote Access
b.	Policy 7008	Wireless Network Security

**a. Policy 7007 Remote Access**

Mr. Berioso highlighted the features of the policy applicable to employees working remotely with the approval of the General Manager. It is designed to hold staff accountable and ensure protection from cybersecurity threats and to protect data. He emphasized that District devices are not for personal use for any reason.

**b. Policy 7008 Wireless Network Security**

Berioso explained the District maintains two wireless networks, one staff, one for visitors or personal staff devices in order to provide separation. Connections for District devices must be approved by IT. Rasha added that this details the current business procedures. The District's approach is conservative, Jagers added.

*The Committee recommended Policies 7007 and 7008 for consideration by the Board of Directors by the following vote:*

MOVED: Covington	SECONDED: Williams	APPROVED
AYES:	Covington, Williams	
NOES:	None.	
ABSTAIN:	None.	
ABSENT:	None.	

## 7. Update on Policy Tracking Matrix

Mr. Berioso reviewed the dashboard, noting that Board policies were recently adopted by the Board and are now more than 50 percent complete. The entire policy project is now at 73.72 percent complete. However if accounting for all the approved policies from the last Board meeting held 5/15/2025, the entire policy progress is at 77.37 percent complete.

*The Committee acknowledged the June presentation of policies:*

7009	Drone Usage Policy
7010	Electronic Signature Policy
7012	Accessibility Policy

*by the following vote:*

MOVED: Williams	SECONDED: Covington	APPROVED
AYES:	Covington, Williams	
NOES:	None.	
ABSTAIN:	None.	
ABSENT:	None.	

## 8. Risk Management Quarterly Report (Jan-Mar 2025)

Mr. Berioso reminded the Committee of its direction to provide this report including action taken to mitigate risks. He noted that legal counsel and ACWA JPIA play a crucial role in risk management and in promoting a safe and compliant work environment. He discussed the ongoing training programs, and Jagers added that efforts have been doubled.

Director Covington asked questions about ergonomics training in the field, OSHA requirements, and requested a list of the trainings being provided. Jagers advised that HR is trying to assure the team that the District is invested in safety compliance and minimizing issues. Per Mr. Berioso, the Safety training aspect has also been added to new hire onboarding in response to CalOSHA requirements.

In response to Chair Covington, Mr. Jagers explained the four current claims against the District.

## 9. 2025 Benefits Survey Report (PowerPoint Presentation)

Human Resources Manager Ren Berioso presented the results of the 2025 Employee Benefits Survey, emphasizing its purpose in gauging employee satisfaction and identifying areas for improvement. The survey was completed by 30 out of 43 eligible employees. Most respondents (67%) had over five years of tenure with the District.

Berioso reported that satisfaction with the District's core benefits was generally strong. Medical insurance received 100% high satisfaction, while other offerings such as the Employee Assistance Program, long-term disability, and flexible spending accounts were rated in the mid-satisfaction range. However, some benefits such as Legal Shield ranked

low. Berioso explained the methodology behind satisfaction ratings and highlighted qualitative feedback.

A significant number of staff members expressed interest in a gym membership benefit (30%), enhanced employee perks (30%), and better dental insurance (20%). Other suggestions included having the District contribute to dental and vision coverage, increasing life insurance, and enhancing wellness offerings.

Director Covington referenced the upcoming Memorandum of Understanding (MOU) negotiations, which will begin in 2026. He recalled that topics such as gym memberships had arisen in prior negotiations, and although not adopted, were considered at the time. He acknowledged that progress had been made on some of these fronts, while reinforcing that prior discussions had involved trade-offs. Ideas brought forward during MOU negotiations are often weighed in terms of give-and-take, and he framed the negotiations as a recurring process where proposals must be weighed against financial impacts. Covington highlighted the usefulness of the survey as a foundation for the upcoming bargaining process and encouraged staff to use it as a tool to structure priorities.

A significant portion of Director Covington's commentary focused on the financial implications of expanding employee benefits. He acknowledged the legitimacy of employee concerns, such as the desire for more holidays and enhanced perks, but stressed that every added benefit incurs a cost that ultimately affects ratepayers. He pointed out that BCVWD is a rate-based agency, and any change to benefits must be considered in light of potential increases to customer rates. Covington cited recent customer burden from the rate study and expressed concern about residents reducing water usage to save money, which could negatively impact the District. He acknowledged that BCVWD provides fewer holidays than many other agencies but suggested that other benefits might balance out this discrepancy.

Covington highlighted the importance of staff being aware of both visible and hidden benefits, including those mandated by changes in state law. He noted that recent policy changes, such as updates to sick leave and FMLA, have introduced new obligations and costs to the District that employees may not fully recognize. He emphasized the role of the benefits survey in giving employees a voice, preparing the District for negotiations, and helping staff prioritize their needs and desires.

Berioso detailed new initiatives already underway in response to employee feedback. These included the introduction of additional dental plan options, the rollout of a no-cost corporate gym membership partnership with Planet Fitness, and access to the Fun Express (FunEx) employee discount program, all also available to Board members. These initiatives, he noted, were structured to avoid any direct cost to the District.

#### **10. Action List for Future Meetings**

- Employee Association topics
- Policy manual updates (ongoing)

**ADJOURNMENT: 5:30 p.m.**

Attest:

*DRAFT UNTIL APPROVED*

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John Covington, Chairman  
to the Personnel Committee of the Beaumont-Cherry Valley Water District



**Beaumont-Cherry Valley Water District  
Personnel Committee Meeting  
June 17, 2025**

**Item 5**

**HUMAN RESOURCES REPORT**

**TO:** Personnel Committee

**FROM:** Ren Berioso, Human Resources Manager

**SUBJECT:** Human Resources Report for the Month of May 2025

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**Table 1: Personnel**

The table below represents the District's current Workforce.

As of May 31, 2025

Total Current Employees (Excluding Board Members)	48
Full-Time Employees	45
Part-Time	1
Temporary	2
Interns	0
Separations	0
Retired Employee(s)	0

**Table 2: New Hires**

The table below represents new hires.

As of May 31, 2025

Employee Name	Job Title	Department
None		

**Table 3: Anniversaries\***

The table below represents BCVWD employee anniversaries.

As of May 31, 2025

Employee Name	Department	Years of Service
Anthony Cove	Operations	30 years
Dwan Lee Jr.	Operations	27 years
Mark Swanson	Engineering	7 years
Andrew Becerra	Operations	7 years
Justin Petruescu	Operations	3 years
Robert Saiz III	Operations	2 years
Edith Garcia	Finance and Administration	1 year

*\*Work Anniversaries for the purposes of this report are calculated from the hire date and do not determine employment conditions or terms. This report does not include elected officials.*



#### **Table 4: Promotions or Division/Title Change**

The table below represents promotions or Division/Title Changes.

As of May 31, 2025

Employee Name	Former Title	Changed to
None		

#### **Table 5: Recruitment**

The table below represents active/closed recruitment(s).

As of May 31, 2025

Position	Department	Update
Engineering Intern	Engineering	Job Posting Closed April 17, 2025 Interviews on-going

#### **Table 6: Separation/Retirement**

The table below represents employees separating from BCVWD.

As of May 31, 2025

Employee Name	Position Held	Department	Last Day
None			

The table below represents the monthly and year-to-date Turnover Rate comparing 2024 and 2025

<b>Turnover Rate as of May 31, 2025</b>	0%	No Separation for this month
<b>2025 Turnover Rate Year-to-Date</b>	6.19%	3 Separations as of May 31, 2025
<b>Turnover Rate as of May 31, 2024</b>	1.30%	3 Separations for this month
<b>2024 Turnover Rate Year-to-Date</b>	6.74%	3 Separations as of May 31, 2024

#### **Table 7: Communications**

The table below represents HR communications to BCVWD employees.

As of May 31, 2025

Communication	Topic
HR Memo 25-012 Ameritas Website Upgrade	Benefits
HR Memo 25-013 Monthly Field Safety Training – Starts First Wednesday in May	Training
HR Memo 25-014 Exclusive FunEx Discounts for BCVWD Employees!	Benefits
HR Memo 25-016 Memorial Day Holiday Closure and Holiday Pay Reminder	Holiday

*Staff Report Prepared by Ren Berioso, Human Resources Manager*



**Beaumont-Cherry Valley Water District  
Personnel Committee  
June 17, 2025**

**Item 6a**

**STAFF REPORT**

**TO:** Personnel Committee

**FROM:** Ren Berioso, Human Resources Manager

**SUBJECT:** Policies and Procedures Manual Updates / Revisions for Policy 3030 Gift Acceptance Guidelines

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**Staff Recommendation**

Recommend the revision of Policy 3030 Gift Acceptance Guidelines to move forward to the next Board of Directors meeting with the revisions stated in Table A, Summary of Policy Changes, or direct staff as desired.

**Executive Summary**

Staff is proposing updates to Policy 3030 Gift Acceptance Guidelines to modernize and refine its language, align it with industry best practices, and include a section outlining appropriate disciplinary actions for employees who violate the policy. These updates are intended to enhance the District's commitment to ethical conduct and accountability.

**Background**

At the May 11, 2022, Regular Board Meeting, the Board of Directors adopted revisions to Policy 3030 Gift Acceptance Guidelines, through Resolution No. 2022-16 that replaced Part 1, Section 14. These revisions incorporated comprehensive language from the California Fair Political Practices Commission (FPPC), providing both the Board and District employees with clear guidance on general limitations and restrictions regarding the acceptance of gifts.

In alignment with the ongoing review of the Ethics Policy by the Ad Hoc Board Policies Committee, Human Resources (HR) staff recently conducted an audit of Policy 3030. Accepting gifts is an important ethical standard for public officials and employees working in California local government agencies. The proposed revisions aim to modernize and refine the policy language, incorporate best practices from other water agencies and industry standards, and introduce a new section outlining disciplinary actions for employees who knowingly violate the policy. This addition ensures the District has a clear course of action to uphold ethical conduct among its staff.

Based on recommendations from District Legal Counsel, HR staff is proposing the removal of a section that enumerates the exceptions listed in the FPPC Fact Sheet. This change is highly recommended to avoid the need for future updates should the applicable law be revised, as policies must adhere to legal statutes. In addition, HR staff also followed legal counsel's advisement to refine a section of the policy that includes catch-all language to ensure compliance in the event of any conflict with the FPPC or other applicable laws. A legal review has been completed to ensure that the proposed revisions are both clear and compliant.



## **Discussion**

Table A, Summary of Policy Changes, outlines the proposed changes to the current Gift Acceptance Guidelines (policy) that are in reference to the redlined draft version attached herewith.

Table A – Summary of Policy Changes

<b>TABLE A</b>	<b>Policy Section</b>	<b>State / Federal Law requirement</b>	<b>BCVWD current practice</b>	<b>Policy Section and Language to Consider</b>	<b>Fiscal Impact of Section</b>
<b>1</b>	<b>Section 3030.1</b>	<b>FPPC</b>	BCVWD follows the law.	Added 3030.5. Does not exceed a value of \$100	No fiscal impact.
<b>2</b>	<b>Section 3030.2</b>	<b>California Code of Regulations §18943</b>	BCVWD follows the law.	Refined the section language in accordance with California Code of Regulations §18943	No fiscal impact.
<b>3</b>	<b>Section 3030.3</b>	<b>FPPC</b>	Not applicable	Placed a section title to serve as a guide for policy readers.	No fiscal impact.
<b>4</b>	<b>Section 3030.4</b>	<b>FPPC</b>	BCVWD follows the law.	Added language in addition to the restrictions and limitations provided by FPPC following industry best practices.  Legal Counsel recommends deleting the list of restrictions as these are provided for by FPPC.	No fiscal impact.



TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Policy Section and Language to Consider	Fiscal Impact of Section
5	No Section	FPPC	BCVWD follows the law.	<b>Add Section 3030.5</b> Notification and Return of Prohibited Gifts	No fiscal impact.
6	Section 3030.5	FPPC and Applicable Gov't Codes	BCVWD follows the law.	<b>Moved as Section 3030.6</b> and refined the section based on recommendation by Legal Counsel to put in a catch-all sentence in reference to applicable laws.	No fiscal impact.
7	No Section	At-Will Employment	BCVWD follows the law.	<b>Added Section 3030.7</b> District Disciplinary Action	No fiscal impact.

### **Fiscal Impact**

There is no fiscal impact in the revision of this policy.

### **Attachments**

1. Redlined version Policy Number 3030 Gift Acceptance Guidelines
2. Side-by-Side version Policy Number 3030 Gift Acceptance Guidelines
3. Clean version Policy Number 3030 Gift Acceptance Guidelines
4. FPPC Fact Sheet (Revised November 2024)

Staff Report prepared by Ren Berioso, Human Resources Manager



# Attachment 1

BEAUMONT-CHERRY VALLEY WATER DISTRICT

POLICY TITLE: GIFT ACCEPTANCE GUIDELINES  
POLICY NUMBER: 3030

**3030.1 General Prohibition on Accepting Gifts.** A ~~District Board Member~~ employee or his or her immediate family may not accept from, or provide to, individuals ~~or~~ companies seeking to do business with the District, gifts, entertainment, services, or benefits unless the transaction meets all of the following guidelines:

1. Is customary and does not give the appearance of impropriety,
2. Does not impose any sense of obligation on either the giver or the receiver,
3. Does not result in any kind of special or favored treatment,
4. Cannot be viewed as extravagant, excessive, or too frequent considering all the circumstances including the ability of the recipient to reciprocate at District expense, and
- ~~4.5. Does not exceed a value of \$100, and~~
- ~~5.6. Is given and received with no effort to conceal the full facts by either the giver or receiver.~~

**3030.2 Definition of a Gift.** A gift is considered anything that confers a personal benefit, including a rebate or discount not given to the public, for which an employee does not provide payment or services of equal or greater value. ~~This policy applies to all District Board Members. An employee or their his/her immediate family (as defined in Fair Political Practices Commission (FPPC) California Code of Regulations Section 18943) may not accept from, or provide to, individuals or companies doing or seeking to do business with the District, gifts, entertainment, services, or benefits from any single source totaling more than the calendar year maximum published by the FPPC.~~

**3030.3 Additional Restrictions for Designated Employees.** Employees of the District who are designated in the District's conflict of interest code (and therefore are required to file a Statement of Economic Interests Form 700 annually), may not accept gifts from any single source totaling more than the calendar year maximum published by the FPPC in a calendar year (Gov. Code §89503(c)).

**3030.4 Gift Exceptions.** ~~California Fair Political Practices Commission provides various exceptions to the definition of gift and those exceptions are not considered gifts or income under this policy. (See FPPC Fact Sheet on Limitations and Restrictions on Gifts, Honoraria, Travel and Loans). In addition to the limitations and restrictions provided by FPPC, the District grants the following exceptions to the prohibition on gift acceptance by Board members and employees:~~

1. Edible gifts of nominal value (less than \$200) that are shared with a wide range of colleagues at BCVWD.
  2. Items that can be displayed in public areas of BCVWD's building (such as flowers).
  3. Handmade items by and from children under age 16.
  4. "Giveaways" handed out by vendors and consultants at conferences, training events, and grand openings provided that such items are made available to anyone attending the event
  5. Small gifts such as pens, paperweights, etc. given to an employee in appreciation for a presentation to a group or organization or in recognition of that individual's accomplishment.
  6. Small gifts with company advertising such as mugs, calendars, paper, etc. which are appropriate for use in the workplace.
  7. Discounts or special offers arranged for all employees by Human Resources. ~~The following are exceptions to the definition of gift and are not considered gifts or income under this policy.~~
1. ~~Return or Reimbursement of Gift. Items that are returned unused or reimbursed to the donor within 30 days of receipt.~~
  2. ~~Donation of Gift to Nonprofit Group. Items that are donated unused to a non profit, tax exempt organization or a government agency within 30 days of receipt, without a tax deduction claim.~~

## BEAUMONT-CHERRY VALLEY WATER DISTRICT

3. ~~Gifts from Family. Gifts from the public official or employee's spouse, child, parent, grandparent, grandchild, brother, sister, current or former parent in law, brother in law, sister in law, aunt, uncle, niece, nephew, or first cousin or the spouse of any such person, great-grandparents, great uncles and aunts, great-nieces and nephews, and first cousins once removed.~~
4. ~~Informational Material. Informational material provided to assist the public official or employee in the performance of their duties, including books, reports, pamphlets, calendars, periodicals, videotapes, or free admission or discounts to informational conferences or seminars.~~
5. ~~Inheritance.~~
6. ~~Plaques. Personalized plaques and trophies with an individual value of less than \$250 (Gov. Code §82028(b)(6); Regulation 18942(a)(6)).~~
7. ~~Items Provided to District. Items provided to the District and used by employees for District business, such as a vendor sample or demonstration.~~
8. ~~Ceremonial Role. Free admission to a ticketed event for the public official or employee and one guest, where the public official or employee performs a ceremonial role.~~
9. ~~Event Where Official Makes a Speech. Free admission, food, and nominal items available to all attendees, at an event where the public official or employee makes a speech.~~
10. ~~Attending Wedding Reception. Benefits received as a guest to a wedding reception where the benefits are the same as those received by the other guests.~~
11. ~~Bereavement Offerings. Bereavement offerings received in memory of a close family member.~~
12. ~~Acts of Neighborliness. Benefits received as an act of neighborliness.~~
13. ~~Campaign or Nonprofit Fundraiser. Two tickets for admission to attend a fundraiser for a campaign committee, candidate, or nonprofit organization.~~
14. ~~Unused Passes or Tickets. Passes or tickets that are unused and not given to another person.~~
15. ~~Emergency Leave Credits. Leave credits (e.g., sick leave or vacation credits) received under the District's Employee Leave Donation Program (Policy 3225).~~
16. ~~Disaster Relief. Benefits received from a disaster relief program available to the general public.~~
17. ~~Agency Raffle. Items awarded in a raffle received by the District from an employee who is not acting as an intermediary for another donor. Alternatively, when the District holds an employee raffle and the item awarded in the raffle has been obtained with District funds.~~
18. ~~Employee Gift Exchange. Items received by an employee during an employee gift exchange.~~

**3030.5 Notification and Return of Prohibited Gifts.** Upon being offered or receiving a gift prohibited by this policy, an individual must notify the gift giver of this policy and graciously decline or return the gift. If the gift is anonymous, the recipient must deliver the gift to the General Manager, or his / her designee, who will convey the gift to a charitable organization.

**3030.6 Compliance and Penalties.** District Board Members and employees are required to follow all regulations of the California Fair Political Practices Commission (FPPC), the California Political Reform Act of 1974 (as amended), and all other laws related to limitations and restrictions on gifts, honoraria, travel and loans. Information and advice regarding the regulations can be found at [fppc.ca.gov](http://fppc.ca.gov). Failure to comply with the laws related to gifts, honoraria, loans, and travel payments may, depending on the violation, result in criminal prosecution and substantial fines, or in administrative or civil monetary penalties for as much as \$5,000 per violation or three times the amount illegally obtained. (See Gov. Code §§ 83116, 89520, 89521, 91000, 91004 and 91005.5.).

**3030.6 District Disciplinary Action.** Violations of this policy may subject an employee to disciplinary action, up to and including termination of employment, depending on the nature and severity of the violation.

**Commented [BR(1):** On 6/3/2025, Mr. Markman (Legal Counsel) recommends "not rewrite or paraphrase state law to include the prohibitions and rules in the FPPC regulations governing gifts"

**Commented [BR(2):** On 6/3/2025, Mr. Markman (Legal Counsel) advised to "put in a catch all sentence making it clear that state law statutes and regulations are paramount to the policy to the extent the two conflict".

# Attachment 2

## CURRENT POLICY

POLICY TITLE: GIFT ACCEPTANCE GUIDELINES  
POLICY NUMBER: 3030

3030.1 An employee or his or her immediate family may not accept from, or provide to, individuals of companies seeking to do business with the District, gifts, entertainment, services, or benefits unless the transaction meets all of the following guidelines:

1. Is customary and does not give the appearance of impropriety,
2. Does not impose any sense of obligation on either the giver or the receiver,
3. Does not result in any kind of special or favored treatment,
4. Cannot be viewed as extravagant, excessive, or too frequent considering all the circumstances including the ability of the recipient to reciprocate at District expense, and
5. Is given and received with no effort to conceal the full facts by either the giver or receiver.

3030.2 A gift is considered anything that confers a personal benefit, including a rebate or discount not given to the public, for which an employee does not provide payment or services of equal or greater value. An employee or his/her immediate family (as defined in Fair Political Practices Commission (FPPC) Regulation 18943) may not accept from, or provide to, individuals or companies doing or seeking to do business with the District, gifts, entertainment, services, or benefits from any single source totaling more than the calendar year maximum published by the FPPC.

3030.3 Employees of the District who are designated in the District's conflict of interest code (and therefore are required to file a Statement of Economic Interests Form 700 annually), may not accept gifts from any single source totaling more than the calendar year maximum published by the FPPC in a calendar year (Gov. Code §89503(c)).

3030.4 Gift Exceptions. The following are exceptions to the definition of gift and are not considered gifts or income under this policy.

1. Return or Reimbursement of Gift. Items that are returned unused or reimbursed to the donor within 30 days of receipt.
2. Donation of Gift to Nonprofit Group. Items that are donated unused to a non-profit, tax-exempt organization or a government agency within 30 days of receipt, without a tax deduction claim.
3. Gifts from Family. Gifts from the public official or employee's spouse, child, parent, grandparent, grandchild, brother, sister, current or former parent-in-law, brother-in-law, sister-in-law, aunt, uncle, niece, nephew, or first cousin or the spouse of any such person, great grandparents, great uncles and aunts, great-nieces and nephews, and first cousins once removed.
4. Informational Material. Informational material provided to assist the public official or employee in the performance of their duties, including books, reports, pamphlets, calendars, periodicals, videotapes, or free admission or discounts to informational conferences or seminars.
5. Inheritance.
6. Plaques. Personalized plaques and trophies with an individual value of less than \$250 (Gov. Code §82028(b)(6); Regulation 18942(a)(6)).
7. Items Provided to District. Items provided to the District and used by employees for District business, such as a vendor sample or demonstration.
8. Ceremonial Role. Free admission to a ticketed event for the public official or employee and one guest, where the public official or employee performs a ceremonial role.
9. Event Where Official Makes a Speech. Free admission, food, and nominal items available to all attendees, at an event where the public official or employee makes a speech.
10. Attending Wedding Reception. Benefits received as a guest to a wedding reception where the benefits are the same as those received by the other guests.

## PROPOSED POLICY

POLICY TITLE: GIFT ACCEPTANCE GUIDELINES  
POLICY NUMBER: 3030

**3030.1 General Prohibition on Accepting Gifts.** A District Board Member, an employee or his or her immediate family may not accept from, or provide to, individuals or companies seeking to do business with the District, gifts, entertainment, services, or benefits unless the transaction meets all of the following guidelines:

1. Is customary and does not give the appearance of impropriety,
2. Does not impose any sense of obligation on either the giver or the receiver,
3. Does not result in any kind of special or favored treatment,
4. Cannot be viewed as extravagant, excessive, or too frequent considering all the circumstances including the ability of the recipient to reciprocate at District expense, and
- 4.5. Does not exceed a value of \$100, and
5. Is given and received with no effort to conceal the full facts by either the giver or receiver.

**3030.2 Definition of a Gift.** A gift is considered anything that confers a personal benefit, including a rebate or discount not given to the public, for which an employee does not provide payment or services of equal or greater value. This policy applies to all District Board Members. An employee or their immediate family (as defined in Fair Political Practices Commission (FPPC) California Code of Regulations § 18943) may not accept from, or provide to, individuals or companies doing or seeking to do business with the District, gifts, entertainment, services, or benefits from any single source totaling more than the calendar year maximum published by the FPPC.

**3030.3 Additional Restrictions for Designated Employees.** Employees of the District who are designated in the District's conflict of interest code (and therefore are required to file a Statement of Economic Interests Form 700 annually), may not accept gifts from any single source totaling more than the calendar year maximum published by the FPPC in a calendar year (Gov. Code §89503(c)).

**3030.4 Gift Exceptions.** California Fair Political Practices Commission provides various exceptions to the definition of gift and those exceptions are not considered gifts or income under this policy. (See FPPC Fact Sheet on Limitations and Restrictions on Gifts, Honoraria, Travel and Loans). In addition to the limitations and restrictions provided by FPPC, the District grants the following exceptions to the prohibition on gift acceptance by Board members and employees:

1. Edible gifts of nominal value (less than \$200) that are shared with a wide range of colleagues at BCVWD.
2. Items that can be displayed in public areas of BCVWD's building (such as flowers).
3. Handmade items by and from children under age 18.
4. "Giveaways" handed out by vendors and consultants at conferences, training events, and grand openings provided that such items are made available to anyone attending the event
5. Small gifts such as pens, paperweights, etc. given to an employee in appreciation for a presentation to a group or organization or in recognition of that individual's accomplishment.
6. Small gifts with company advertising such as mugs, calendars, paper, etc. which are appropriate for use in the workplace.
7. Discounts or special offers arranged for all employees by Human Resources. The following are exceptions to the definition of gift and are not considered gifts or income under this policy.
4. Return or Reimbursement of Gift. Items that are returned unused or reimbursed to the donor within 30 days of receipt.
2. Donation of Gift to Nonprofit Group. Items that are donated unused to a non-profit, tax-exempt organization or a government agency within 30 days of receipt, without a tax deduction claim.



11. Bereavement Offerings. Bereavement offerings received in memory of a close family member.
12. Acts of Neighborliness. Benefits received as an act of neighborliness.
13. Campaign or Nonprofit Fundraiser. Two tickets for admission to attend a fundraiser for a campaign committee, candidate, or nonprofit organization.
14. Unused Passes or Tickets. Passes or tickets that are unused and not given to another person.
15. Emergency Leave Credits. Leave credits (e.g., sick leave or vacation credits) received under the District's Employee Leave Donation Program (Policy 3225).
16. Disaster Relief. Benefits received from a disaster relief program available to the general public.
17. Agency Raffle. Items awarded in a raffle received by the District from an employee who is not acting as an intermediary for another donor. Alternatively, when the District holds an employee raffle and the item awarded in the raffle has been obtained with District funds.
18. Employee Gift Exchange. Items received by an employee during an employee gift exchange.

3030.5 District employees are required to follow all regulations of the California Fair Political Practices Commission (FPPC). Information and advice regarding the regulations can be found at [fppc.ca.gov](http://fppc.ca.gov). Failure to comply with the laws related to gifts, honoraria, loans, and travel payments may, depending on the violation, result in criminal prosecution and substantial fines, or in administrative or civil monetary penalties for as much as \$5,000 per violation or three times the amount illegally obtained. (See Gov. Code §§ 83116, 89520, 89521, 91000, 91004 and 91005.5.)

2. ~~Gifts from Family. Gifts from the public official or employee's spouse, child, parent, grandparent, grandchild, brother, sister, current or former parent in law, brother in law, sister in law, aunt, uncle, niece, nephew, or first cousin or the spouse of any such person, great grandparents, great uncles and aunts, great nieces and nephews, and first cousins once removed.~~
4. ~~Informational Material. Informational material provided to assist the public official or employee in the performance of their duties, including books, reports, pamphlets, calendars, periodicals, videotapes, or free admission or discounts to informational conferences or seminars.~~
5. ~~Inheritance.~~
6. ~~Plaques. Personalized plaques and trophies with an individual value of less than \$250 (Gov. Code §82028(b)(6); Regulation 18942(a)(6)).~~
7. ~~Items Provided to District. Items provided to the District and used by employees for District business, such as a vendor sample or demonstration.~~
8. ~~Ceremonial Role. Free admission to a ticketed event for the public official or employee and one guest, where the public official or employee performs a ceremonial role.~~
9. ~~Event Where Official Makes a Speech. Free admission, food, and nominal items available to all attendees, at an event where the public official or employee makes a speech.~~
10. ~~Attending Wedding Reception. Benefits received as a guest to a wedding reception where the benefits are the same as those received by the other guests.~~
11. ~~Bereavement Offerings. Bereavement offerings received in memory of a close family member.~~
12. ~~Acts of Neighborliness. Benefits received as an act of neighborliness.~~
13. ~~Campaign or Nonprofit Fundraiser. Two tickets for admission to attend a fundraiser for a campaign committee, candidate, or nonprofit organization.~~
14. ~~Unused Passes or Tickets. Passes or tickets that are unused and not given to another person.~~
15. ~~Emergency Leave Credits. Leave credits (e.g., sick leave or vacation credits) received under the District's Employee Leave Donation Program (Policy 3225).~~
16. ~~Disaster Relief. Benefits received from a disaster relief program available to the general public.~~
17. ~~Agency Raffle. Items awarded in a raffle received by the District from an employee who is not acting as an intermediary for another donor. Alternatively, when the District holds an employee raffle and the item awarded in the raffle has been obtained with District funds.~~
18. ~~Employee Gift Exchange. Items received by an employee during an employee gift exchange.~~

**3030.5 Notification and Return of Prohibited Gifts.** Upon being offered or receiving a gift prohibited by this policy, an individual must notify the gift giver of this policy and graciously decline or return the gift. If the gift is anonymous, the recipient must deliver the gift to the General Manager, or his / her designee, who will convey the gift to a charitable organization.

**3030.6 Compliance and Penalties.** District Board Members and employees are required to follow all regulations of the California Fair Political Practices Commission (FPPC), the California Political Reform Act of 1974 (as amended), and all other laws related to limitation and restrictions on gifts, honoraria, travel and loans. Information and advice regarding the regulations can be found at [fppc.ca.gov](http://fppc.ca.gov). Failure to comply with the laws related to gifts, honoraria, loans, and travel payments may, depending on the violation, result in criminal prosecution and substantial fines, or in administrative or civil monetary penalties for as much as \$5,000 per violation or three times the amount illegally obtained. (See Gov. Code §§ 83116, 89520, 89521, 91000, 91004 and 91005.5.)

**3030.7 District Disciplinary Action.** Violations of this policy may subject an employee to disciplinary action up to and including termination of employment, depending on the nature and severity of the violation.

**POLICY TITLE: GIFT ACCEPTANCE GUIDELINES**  
**POLICY NUMBER: 3030**

## **Attachment 3**

**3030.1 General Prohibition on Accepting Gifts.** A District Board Member, employee or his or her immediate family may not accept from, or provide to, individuals or companies seeking to do business with the District, gifts, entertainment, services, or benefits unless the transaction meets all of the following guidelines:

1. Is customary and does not give the appearance of impropriety,
2. Does not impose any sense of obligation on either the giver or the receiver,
3. Does not result in any kind of special or favored treatment,
4. Cannot be viewed as extravagant, excessive, or too frequent considering all the circumstances including the ability of the recipient to reciprocate at District expense, and
5. Does not exceed a value of \$100, and
6. Is given and received with no effort to conceal the full facts by either the giver or receiver.

**3030.2 Definition of a Gift.** A gift is considered anything that confers a personal benefit, including a rebate or discount not given to the public, for which an employee does not provide payment or services of equal or greater value. This policy applies to all District Board Members, employees or their immediate family (as defined in California Code of Regulations § 18943).

**3030.3 Additional Restrictions for Designated Employees.** Employees of the District who are designated in the District's conflict of interest code (and therefore are required to file a Statement of Economic Interests Form 700 annually), may not accept gifts from any single source totaling more than the calendar year maximum published by the FPPC in a calendar year (Gov. Code §89503(c)).

**3030.4 Gift Exceptions.** California Fair Political Practices Commission provides various exceptions to the definition of gift and those exceptions are not considered gifts or income under this policy. (See FPPC Fact Sheet on Limitations and Restrictions on Gifts, Honoraria, Travel and Loans). In addition to the limitations and restrictions provided by FPPC, the District grants the following exceptions to the prohibition on gift acceptance by Board members and employees:

1. Edible gifts of nominal value (less than \$200) that are shared with a wide range of colleagues at BCVWD.
2. Items that can be displayed in public areas of BCVWD's building (such as flowers).
3. Handmade items by and from children under age 16.
4. "Giveaways" handed out by vendors and consultants at conferences, training events, and grand openings provided that such items are made available to anyone attending the event
5. Small gifts such as pens, paperweights, etc. given to an employee in appreciation for a presentation to a group or organization or in recognition of that individual's accomplishment.
6. Small gifts with company advertising such as mugs, calendars, paper, etc. which are appropriate for use in the workplace.
7. Discounts or special offers arranged for all employees by Human Resources.

**3030.5 Notification and Return of Prohibited Gifts.** Upon being offered or receiving a gift prohibited by this policy, an individual must notify the gift giver of this policy and graciously decline or return the gift. If the gift is anonymous, the recipient must deliver the gift to the General Manager, or his / her designee, who will convey the gift to a charitable organization.

**3030.6 Compliance and Penalties.** District Board Members and employees are required to follow all

Adopted by Resolution xxx

regulations of the California Fair Political Practices Commission (FPPC), the California Political Reform Act of 1974 (as amended), and all other laws related to limitation and restrictions on gifts, honoraria, travel and loans. Information and advice regarding the regulations can be found at [fppc.ca.gov](http://fppc.ca.gov). Failure to comply with the laws related to gifts, honoraria, loans, and travel payments may, depending on the violation, result in criminal prosecution and substantial fines, or in administrative or civil monetary penalties (See Gov. Code §§ 83116, 89520, 89521, 91000, 91004 and 91005.5).

**3030.7 District Disciplinary Action.** Violations of this policy may subject an employee to disciplinary action, up to and including termination of employment, depending on the nature and severity of the violation.

Adopted by Resolution xxx



# **Limitations and Restrictions on Gifts, Honoraria, Travel and Loans**

## ***A Fact Sheet For***

- ♦ Local Elected Officers and Candidates for Local Elective Offices
- ♦ Local Officials Specified in Government Code Section 87200
- ♦ Judicial Candidates
- ♦ Designated Employees of Local Government Agencies

## **California Fair Political Practices Commission**

Toll-free advice line: 1 (866) ASK-FPPC

Email advice: [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov)

Web site: [www.fppc.ca.gov](http://www.fppc.ca.gov)

**November 2024**

# Introduction

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The Political Reform Act<sup>1</sup> (the “Act”) imposes limits on gifts, prohibits honoraria payments, and imposes limits and other restrictions on the receipt of travel payments received by:

- Local elected officers and other local officials specified in Government Code Section 87200,<sup>2</sup> excluding judges;<sup>3</sup>
- Designated employees of local government agencies (i.e., individuals required to file statements of economic interests under a local agency’s conflict of interest code); and
- Candidates<sup>4</sup> for any of these offices or positions and judicial candidates. (Sections 89502 and 89503.)

The Act also imposes limits and other restrictions on personal loans received by certain local officials.

The gift limit increased to **\$630** for calendar years **2025** and **2026**. The gift limit in 2024 was **\$590**.

This fact sheet summarizes the major provisions of the Act concerning gifts, honoraria, travel, and loans. It contains highlights of the law, but does not carry the weight of law. For more information, contact the Fair Political Practices Commission at (866) 275-3772 or [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov) or visit our website at [www.fppc.ca.gov](http://www.fppc.ca.gov). Commission advice letters are available on our website. Public officials may also be subject to local restrictions on gifts, honoraria, or travel.

## Enforcement

**Failure to comply with the laws related to gifts, honoraria, loans, and travel payments may, depending on the violation, result in criminal prosecution and substantial fines, or in administrative or civil monetary penalties for as much as \$5,000 per violation or three times the amount illegally obtained. (See Sections 83116, 89520, 89521, 91000, 91004 and 91005.5.)**

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<sup>1</sup> The Political Reform Act is contained in Government Code Sections 81000 through 91014. All statutory references are to the Government Code, unless otherwise indicated. The regulations of the Fair Political Practices Commission are contained in Sections 18110 through 18997 of Title 2 of the California Code of Regulations. All regulatory references are to Title 2, Division 6 of the California Code of Regulations, unless otherwise indicated.

<sup>2</sup> Local officials specified in Government Code Section 87200 include: members of boards of supervisors and city councils, mayors, city/county planning commissioners, city/county chief administrative officers, city/county treasurers, district attorneys, county counsels, city managers, city attorneys, court commissioners and public officials who manage public investments.

<sup>3</sup> The gift limits and honoraria ban in the Political Reform Act do not apply to a person in their capacity as judge. However, candidates for judicial offices are subject to the restrictions contained in the Political Reform Act. (Sections 89502 and 89503.)

<sup>4</sup> For purposes of the gift limit and honoraria prohibition, an individual becomes a “candidate” when they file a statement of organization (Form 410) as a controlled committee for the purpose of seeking elective office, a candidate intention statement (Form 501), or a declaration of candidacy, whichever occurs first. If an individual is an unsuccessful candidate, they will no longer be subject to the gift limit and honoraria prohibition when they have terminated their campaign filing obligations, or after certification of election results, whichever is earlier. (Sections 89502(b) and 89503(b).)



# Gifts

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## Limitations

Local elected officers, candidates for local elective office, local officials specified in Government Code Section 87200, and judicial candidates, may not accept gifts from any single source totaling more than \$630 in a calendar year. (Section 89503.)<sup>5</sup>

Employees of a local government agency who are designated in the agency's conflict of interest code may not accept gifts from any single source totaling more than \$630 in a calendar year if the employee is required to report receiving income or gifts from that source on their statement of economic interests (Form 700). (Section 89503(c).)

## What is a "Gift"?

A "gift" is any payment or other benefit that confers a *personal* benefit for which a public official does not provide payment or services of equal or greater value. A gift includes a rebate or discount in the price of anything of value unless the rebate or discount is made in the regular course of business to members of the public. (Section 82028.) (See Regulation 18946 for valuation guidelines.)

Except as discussed below, a public official has "received" or "accepted" a gift when they have actual possession of the gift or when they take any action exercising direction or control over the gift, including discarding the gift or turning it over to another person. This includes gifts that are accepted by someone else on the official's behalf and gifts made to others at the direction of the official. (Regulation 18941.)

## Gifts to Family Members

Under certain circumstances, a gift to an official's family member\* is considered a gift to the official. (Regulation 18943.) When something of value is given to a family member it is presumed to be a gift to the official if: (1) there is no established relationship between the donor and the family member where it would generally be considered appropriate for the family member to receive the gift or; (2) the donor is someone who lobbies the official's agency, is involved in an action before the official's agency in which the official may foreseeably participate, or engage in business with the agency in which the official will foreseeably participate. (Wedding gifts are treated differently, see below.)

\*For purposes of this rule, an official's "family member" includes the official's spouse; registered domestic partner; any minor child of the official who the official can claim as a dependent for federal tax purposes; and a child of the official who is aged 18 to 23 years old, attends school, resides with the official when not attending school, and provides less than one-half of their own support.

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<sup>5</sup> The gift limit is adjusted biennially to reflect changes in the Consumer Price Index. For 2025-2026, the gift limit is \$630. (Section 89503; Regulation 18940.2.) Gifts from a single source aggregating to \$50 or more must be disclosed, and gifts aggregating to \$630 or more during any 12-month period may subject an official to disqualification with respect to the source. (Section 87103(e).) Designated employees should obtain a copy of their conflict of interest code from their agency. Some conflict of interest codes require very limited disclosure of income and gifts. Gifts from sources that are not required to be disclosed on the Form 700 are not subject to the \$630 gift limit but still may subject the public official to disqualification.

## Source of Gift

Under most circumstances, it is clear who the source of a gift is, but if the circumstances indicate that the gift is being provided by an intermediary, the public official must determine both the donor and the intermediary in reporting the gift. Regulation 18945 provides the rules for determining the source of the gift.

## Gifts from Multiple Sources

In determining the cumulative value of any reportable gifts, separate gifts from an individual and an entity that the individual controls must be aggregated as one source to comply with the reporting and limit requirements. For example, separate gifts from the owner of a company and from the company itself would be treated as if from one source if the owner has more than a 50 percent interest in the company, unless the making of the gift was determined by someone else in the company. In that case, the gift from the company would be aggregated with any gifts made by that determining individual. (Regulation 18945.1.)

Group gifts, where a public official receives a single gift from multiple donors (such as a retirement gift from coworkers), need not be reported unless any person contributes \$50 or more to the total cost of the gift. In that case, the public official would only report a gift from each of those persons. (Regulation 18945.2.)

## Valuing Gifts

The general rule for determining the value of a gift is to apply the fair market value at the time the gift is received. Fair market value can be determined by finding any local or internet advertisement for the item. Special exceptions to the fair market value rule are contained in Regulations 18946.1 through 18946.5 which covers admission to ticketed and invitation-only events, wedding gifts, attendance at nonprofit and political fundraisers, and air travel. (Regulation 18946.) For example, for ticketed events, the value is the face value of the ticket.

## General Gift Exceptions

Form 700 Reporting	C/I § 87100	Honoraria Ban	\$630 Gift Limit
No	No	No	No

The following payments are exceptions to the definition of gift and are not considered gifts or income.

- 1. Return or Reimbursement of Gift.** Items that are returned (unused) to the donor, or for which the public official reimburse the donor, within 30 days of receipt. (Section 82028(b)(2); Regulation 18941.)
- 2. Donation of Gift to Nonprofit Group.** Items that are donated (unused) to a non-profit, tax-exempt (501(c)(3)) organization in which the official (or immediate family member) does not hold a position, or to a government agency, within 30 days of receipt without claiming a deduction for tax purposes. (Section 82028(b)(2); Regulation 18941.)
- 3. Gifts from Family.** Gifts from the public official's spouse (or former spouse), child, parent, grandparent, grandchild, brother, sister, current or former parent-in-law, brother-in-law, sister-in-law, aunt, uncle, niece, nephew, or first cousin or the spouse of any such person, unless they are acting as an agent or intermediary for another person who is the true source of the gift. (Section 82028(b)(3); Regulation 18942(a)(3).) This exception includes great grandparents, great uncles and aunts, great nieces and nephews, and first cousins once removed.
- 4. Informational Material.** Informational material provided to assist the public official in the performance of their official duties, including books, reports, pamphlets, calendars, periodicals, videotapes, or free admission or discounts to informational conferences or seminars.

“Informational material” may also include scale models, pictorial representations, maps, and other such items. However, if the item’s fair market value is more than \$630, the public official has the burden of demonstrating that the item is informational. In addition, on-site demonstrations, tours, or inspections, including air flights over an area that is the subject of the information and designed specifically for public officials, are considered informational material. However, this exception does not apply to meals or lodging. Furthermore, the exception generally does not apply to transportation to the site, except for any portion of the transportation that is not commercially available. (Section 82028(b)(1); Regulations 18942(a)(1) and 18942.1.)

5. **Inheritance.** A devise or inheritance. (Section 82028(b)(5); Regulation 18942(a)(5).)

6. **Campaign Contributions.** Campaign contributions to an official, including rebates or discounts received in connection with campaign activities (Section 82028(b)(4); Regulations 18942(a)(4), 18950(a) and 18950.3(a)) and permissible expenditures of campaign funds for campaign-related expenses, including payments for transportation, lodging or food (Regulations 18950(a) and 18950.3(b)), provided they comply and are properly reported in accordance with applicable campaign finance laws.

7. **Plaques.** Personalized plaques and trophies with an individual value of less than \$250. (Section 82028(b)(6); Regulation 18942(a)(6).)

8. **Ceremonial Role.** Free admission to a ticketed event (including any benefits included in the price of the ticket such as a free meal) for the official and one guest at an event where the official performs a ceremonial role, such as throwing out the first pitch at a Dodgers’ game, so long as the official’s agency complies with the posting provisions set forth in Regulation 18944.1(d). (Regulation 18942(a)(13); Regulation 18942.3; also see discussion of Form 802 below under “Gifts Exceptions Requiring Alternate Reporting.”)

9. **Event Where Official Makes a Speech.** Free admission, and food and nominal items (such as a pen, pencil, mouse pad, note pad or similar item) available to all attendees, at the event at which the official makes a speech (as defined in Regulation 18950(b)(2)), so long as the admission is provided by the person who organizes the event. (Regulation 18942(a)(11).)

10. **Attending Wedding Reception.** Benefits received as a guest attending a wedding reception where the benefits are the same as those received by the other guests at the reception. (Regulation 18942(a)(15).)

11. **Bereavement Offerings.** Bereavement offerings, such as flowers at a funeral received in memory of a close family member. (Regulation 18942(a)(16).)

12. **Acts of Neighborliness.** Benefits received as an act of neighborliness such as the loan of an item, an occasional ride, or help with a repair where the act is consistent with polite behavior in a civilized society and would not normally be part of an economic transaction between like participants under similar circumstances. (Regulation 18942(a)(17).)

13. **Campaign or Nonprofit Fundraiser.** Two tickets for admission, for use by only the official and one guest, to attend a fundraiser for a campaign committee or candidate, or to a fundraiser for an organization exempt from taxation under Section 501(c)(3) of the Internal Revenue Code. The ticket(s) must be received from the organization or committee holding the fundraiser. (Regulation 18946.4.)

14. **Unused Passes or Tickets.** Passes or tickets that provide admission or access to facilities, goods, services, or other benefits (either on a one-time or repeated basis) that the public official does not use and do not give to another person. (Regulation 18946.1.)

15. **Items Provided to Government Agency.** Subject to certain conditions, items provided to a government agency and used by public officials in the agency for agency business. This may include

passes or tickets to (see Regulation 18944.1) or payments for other types of items or activities (see Regulation 18944). An agency must disclose specified payments on a form provided by the FPPC and post the form on its website. (See discussion of Forms 801 and 802 below under “Gift Exceptions Requiring Alternate Reporting.”) Contact the FPPC for detailed information.

**16. Emergency Leave Credits.** Leave credits (e.g., sick leave or vacation credits) received under a bona fide catastrophic or emergency leave program established by the public official's employer and available to all employees in the same job classification or position. Donations of cash are gifts and are subject to limits and disclosure. (Regulation 18942(a)(9).)

**17. Disaster Relief.** Food, shelter, or similar assistance received in connection with a disaster relief program. The benefits must be received from a governmental agency or charity and must be available to the general public. (Regulation 18942(a)(10).)

**18. Agency Raffle.** Items awarded in an agency raffle received by the agency from an employee who is not acting as an intermediary for another donor. This exception applies when an agency holds an employee raffle and the item awarded in the raffle has been obtained with agency funds, or is otherwise an asset of the agency and not donated to the agency by a non-agency source. This exception does not apply to passes or tickets of the type described in Regulation 18944.1. (Regulation 18944.2(a) and (b).)

**19. Employee Gift Exchange.** Items received by an employee during an employee gift exchange, so long as the items received are provided by another employee of the agency and the gifts are not substantially disproportionate in value. (Regulation 18944.2(c).)

#### Limited Gift Exceptions

Form 700 Reporting	C/I § 87100	Honoraria Ban	\$630 Gift Limit
No	No	No	No

**1. Home Hospitality.** Gifts of hospitality including food, drink or occasional lodging that an official receives in an individual's home when the individual or a member of their family is present. (Regulation 18942(a)(7).) For this exception to apply, the official must have a relationship, connection or association with the individual providing the in-home hospitality that is unrelated to the official's position and the hospitality must be provided as part of that relationship. Generally, this means functions like children's birthday parties, soccer team parties, neighborhood barbeques, etc., where other guests attend who are not part of the lobbying process. (Regulation 18942.2.)

**2. Reciprocal Holiday Gifts.** Gifts commonly exchanged between an official and another individual on holidays, birthdays, or similar occasions to the extent that the gifts exchanged are not substantially disproportionate in value. (Regulation 18942(a)(8)(A).)

**3. Reciprocal Exchanges.** Reciprocal exchanges between an official and another individual that occur on an ongoing basis so long as the total value of payments received by the official within the calendar year is not substantially disproportionate to the amount paid by the official and no single payment is \$630 or more. For example, if two people get together regularly for lunches and rotate picking up the lunch tab so that each pays approximately half the total value over the course of the calendar year, no gift need be reported. (Regulation 18942(a)(8)(B).)

**4. Dating Relationship.** Personal benefits commonly received from a dating partner. These gifts are not disclosable or limited but are subject to disqualification under the conflict of interest laws if the dating partner has certain business before the official as set forth in Regulation 18942(a)(18)(D). (Regulation 18942(a)(18)(A).)

**5. Acts of Human Compassion.** Assistance, financial or otherwise, to offset family medical or living expenses that the official can no longer meet without private assistance because of an accident, illness, employment loss, death in the family, or other unexpected calamity; or to defray expenses associated with humanitarian efforts such as the adoption of an orphaned child, so long as the source of the donation is an individual who has a prior social relationship with the official of the type where it would be common to provide such assistance, or the payment is made without regard to official status under other circumstances in which it would be common to receive community outreach. (Regulation 18942(a)(18)(B).) This exception does not apply if the person providing the benefit to the official is an individual who otherwise has business before the official as set forth in Regulation 18942(a)(18)(D).

**6. Long-Time Friend.** Benefits received from a long-time personal friend where the gift is unrelated to the official's duties. The exception does not apply if the individual providing the benefit to the official is involved in some manner with business before the official. (Regulation 18942(a)(18)(C).) This exception does not apply if the person providing the benefit to the official is an individual who otherwise has business before the official as set forth in Regulation 18942(a)(18)(D).

**7. Existing Personal Relationship.** Benefits received from an individual where it is clear that the gift was made because of an existing personal or business relationship unrelated to the official's position and there is no evidence whatsoever at the time the gift is made that the official makes or participates in the type of governmental decisions that may have a reasonably foreseeable material financial effect on the individual who would otherwise be the source of the gift. (Regulation 18942(a)(19).)

#### Very Limited Gift Exception

Reporting	C/I § 87100	Honoraria Ban	\$630 Gift Limit
Yes - ½ value as gift	Yes	No	No

**Wedding Gifts.** Wedding gifts are not subject to the \$630 gift limit. However, wedding gifts are reportable, but for purposes of valuing wedding gifts, one-half of the value of each gift is attributable to each spouse. (Regulation 18946.3.)

#### Gift Exceptions Requiring Alternate Reporting

Form 700 Reporting	C/I § 87100	Honoraria Ban	\$630 Gift Limit
Yes - As Income	Yes	No	No

**Prize or Award.** A prize or award received in a bona fide contest or competition, or game of chance. **Note: Unlike the other exceptions, payments that fall into this exception must be reported as income if valued at \$500 or more.** To qualify for this exception the contest or competition must be unrelated to the official's duties. (Regulation 18942(a)(14).)

#### Agency Reports

Reporting	C/I § 87100	Honoraria Ban	\$630 Gift Limit
Yes - On 801 or 802	No	No	No

The following exceptions are also applicable to payments made to a government agency that are used by officials in the agency under certain conditions to conduct agency business. These types of payments are not treated as gifts or income to the officials who use them, so long as the payments meet certain conditions and they are reported by the officials' agency. These reports must appear on either a Form 801 or Form 802, instead of the official reporting the items on a statement of economic interests (Form 700).

**Form 801 – Payment to Agency Report:** This form covers gifts or donations made to an agency and used by one or more officials in the agency for agency business. This may include travel payments, reimbursements, or other uses by an official, but does not cover tickets or passes providing admission to an entertainment or sporting event, which are reported on the Form 802 (discussed below). If the payment meets the requirements of Regulations 18944 or 18950.1, the agency must report it on a Form 801 and the item is not reported on the individual’s statement of economic interests (Form 700). (Regulations 18944 and 18950.1.)

**Form 802 – Agency Report of Ceremonial Role Events and Ticket/Pass Distributions:** This form covers gifts or donations made to an agency that provide tickets or passes to an agency official for admission to an entertainment or sporting event. For the ticket or pass to be exempt from reporting on the individual’s statement of economic interests (Form 700), the agency must have a written policy stating the public purpose for distribution of the tickets. The ticket or pass cannot be earmarked by the original source for use by a particular agency official and the agency must determine, in its sole discretion, which official may use the ticket or pass. (Regulation 18944.1.) The Form 802 is also used to report tickets provided for officials who perform a ceremonial role on behalf of the agency.

### Behested Payments Reports

Reporting	C/I § 87100	Honoraria Ban	\$630 Gift Limit
Yes - Form 803 Behested Payment	No*	No	No*

**Behested Payments.** Generally, payments made at the behest of an official that do not confer a personal benefit on an official, such as those made by a third party to co-sponsor an event, or that are principally legislative, governmental, or charitable in nature, are not gifts. However, when a local elected officer is making the behest, in some cases these payments may be considered “behested payments” under Section 82004.5 and require disclosure by that elected officer.

**\*Note:** when a behested payment *does confer a personal benefit on the official*, the gift limit and conflict of interest rules apply, and the official may have a reportable gift or income in addition to a behested payment reporting duty.

### Form 803 – Behested Payment Report

- Behested payments are reportable if made principally for legislative, governmental, or charitable purposes. These payments are not for campaign purposes and any personal benefit may constitute a gift to the official subject to the applicable gift limit. For example, a local elected official may ask a third party to contribute funds to a school in her district, or to a job fair or health fair. A gift to the official may occur, for example, where the official attends the event and receives a meal without charge.
- Generally, a donation will be “made at the behest” if it is requested, solicited, or suggested by the elected officer or member of the Public Utilities Commission, or otherwise made to a person in cooperation, consultation, coordination with, or at the consent of, the elected officer or PUC member. This includes payments behested on behalf of the official by their agent or employee.
- A behested payment does not include payments to an official from a local, state, or federal government agency for use by the official to conduct agency business. For example, free parking provided by a governmental entity to an official for agency business is not a behested payment and is not subject to reporting.
- Behested payments totaling \$5,000 or more from a single source in a calendar year must be disclosed by the official on a Form 803, which is filed with the official’s agency within 30 days of the date of the payment(s). (Section 84224; see Regulations 18424-18424.3.)

# Honoraria

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## What is an “Honorarium”?

An “honorarium” is any payment made in consideration for any speech given, article published, or attendance at any public or private conference, convention, meeting, social event, meal, or like gathering. An honorarium includes gift cards or any gift of more than nominal benefit provided in connection with an activity described above. An honorarium does not include items of nominal value such as a pen, pencil, note pad, or similar item. (Section 89501; Regulation 18932.4(e).)

A “speech given” means a public address, oration, or other form of oral presentation, including participation in a panel, seminar, or debate. (Regulation 18931.1.)

An “article published” means a nonfictional written work: 1) that is produced in connection with any activity other than the practice of a bona fide business, trade, or profession; and 2) that is published in a periodical, journal, newspaper, newsletter, magazine, pamphlet, or similar publication. (Regulation 18931.2.)

“Attendance” means being present during, making an appearance at, or serving as host or master of ceremonies for any public or private conference, convention, meeting, social event, meal, or like gathering. (Regulation 18931.3.)

The Act and Commission regulations provide certain exceptions to the prohibition on honoraria. (Section 89501(b); Regulations 18932 –18933.).

## The Prohibition

Local officials specified in Section 87200 (see page 2) are prohibited from receiving any honoraria payments. Officials and employees of local agencies who file statements of economic interests (Form 700) under the agency’s conflict of interest code (“designated employees”) may not receive honoraria payments from any source if the employee would be required to report income or gifts from that source on the Form 700, as outlined in the “disclosure category” portion of the conflict of interest code. (Section 89502.)

## Honoraria Exceptions that also apply to gifts and income

1. **Returned.** An honorarium that the public official returns (unused) to the donor or the donor’s agent or intermediary within 30 days. (Section 89501(b); Regulation 18933.)
2. **Donated to General Fund.** An honorarium that is delivered to the official’s local agency within 30 days for donation to the agency’s general fund and for which the public official does not claim a deduction for income tax purposes. (Section 89501(b); Regulation 18933.)
3. **Made to Nonprofit Organization.** A payment that is not delivered to the public official but is made directly to a bona fide charitable, educational, civic, religious, or similar tax-exempt, non-profit organization. However:
  - The official may not make the donation a condition for their speech, article, or attendance;
  - The official may not claim the donation as a deduction for income tax purposes.
  - The official may not be identified to the non-profit organization in connection with the donation; and
  - The donation may have no reasonably foreseeable financial effect on the public official or on any member of their immediate family. (Regulation 18932.5.)

**4. Payment from Family Member.** A payment received from the public official's spouse, child, parent, grandparent, grandchild, brother, sister, parent-in-law, brother-in-law, sister-in-law, nephew, niece, aunt, uncle, or first cousin, or the spouse of any such person. However, a payment that would be considered an honorarium is prohibited if one of these persons is acting as an agent or intermediary for someone else. (Regulation 18932.4(b).)

**5. Payment for Performance or Book.** Payments received for a comedic, dramatic, musical, or other similar artistic performance, and payments received for the publication of books, plays, or screenplays. (Regulations 18931.1 and 18931.2.)

**6. Reimbursement for Travel Where Official Provides Consideration.** Reimbursements for reasonable travel expenses provided to the public official by a bona fide non-profit, tax-exempt (501(c)(3)) entity for which the public official provides equal or greater consideration. The payment would also be exempt from the definition of income under Section 82030(b)(2). (See discussion under "Travel Payments" below.)

**Honoraria Exceptions where the payment may still be considered income (or a gift, if consideration of equal or greater value is not provided by the official)**

**1. Admission to Event Where Official Gives Speech.** Free admission, and refreshments and similar non-cash nominal benefits, provided to an official during the entire event at which they give a speech, participates in a panel or provides a similar service, and in-California transportation and necessary lodging and subsistence provided directly in connection with the speech, panel or service, including meals and beverages on the day of the activity. (Regulation 18932.4(e).)

**2. Earned Income from a Business.** Income earned and payments for travel made in connection with personal services rendered by the official if the services are provided in connection with a bona fide business, trade, or profession — such as teaching, practicing law, medicine, insurance, real estate, banking, or building contracting — and the services are customarily provided in connection with the business, trade, or profession. (Section 89506(d)(3) and Regulations 18950(a) and 18950.2.)

This exception does not apply if the sole or predominant activity of the business, trade, or profession is making speeches. In addition, the public official must meet certain criteria to establish that they are conducting or in a bona fide business, trade, or profession (such as maintenance of business records, licensure, proof of teaching position) before a payment received for personal services which may meet the definition of honorarium would be considered earned income and not an honorarium. (Section 89501(b); Regulations 18932 – 18932.3.) Earned income is required to be reported. Contact the FPPC for detailed information.

**3. Travel from a Government Agency.** Travel payments provided to the public official by their government agency or by any state, local, or federal government agency which would be considered income and not a gift. (Section 89506(d)(2).) See discussion under "Travel Payments" below.



# Travel Payments Exceptions

Generally, when an official receives a payment (including reimbursement) for their travel, that payment is a reportable gift or income under the Act. The term “travel payment” includes payments, advances, or reimbursements for travel, including actual transportation, parking and related lodging and subsistence. (Section 89506(a).)

If the payment is a gift, it is also normally subject to the Act’s \$630 gift limit. If the payment is income, it may, in some cases, be an honorarium. Whether a payment is a gift or income, the official may be required to disqualify themselves from any decision that will have a foreseeable materially financial effect on the source.

## Certain Travel Payments are not a Gift, Income or Honorarium

Reporting	C/I § 87100	Honoraria Ban	\$630 Gift Limit
No	No	No	No

The following travel payments are not a gift, income or honorarium under the Act and Commission regulations and are thus not reportable, potentially disqualifying, or subject to any of the Act’s gift limits or the honorarium ban.

- 1. Travel from a Non-Reportable Source.** A payment for travel from a source that is not reportable on the official’s statement of economic interests (Form 700) based on the provisions of the conflict of interest code of the official’s agency.
- 2. Travel from Government Agency for Training.** A payment for travel from another local, state, or federal government agency and related per diem expenses when the travel is for education, training or other inter-agency programs or purposes. (Regulation 18950(a) and (c)(2).)
- 3. Sharing a Ride with Another Official.** A payment for travel provided to the official in a vehicle or aircraft owned by another official or agency when each official is traveling to or from the same location for an event as a representative of their respective offices. (Regulation 18950(a) and (c)(3).)
- 4. Certain Travel from a Government Agency or 501(c)(3).** Travel payments provided to the official by any state, local, or federal government agency as part of the official’s employment with that agency or provided to the official by a bona fide non-profit, tax-exempt (501(c)(3)) entity for which the official provides equal or greater consideration. (Section 82030(b)(2).) Any person who claims to have provided consideration has the burden of proving that the consideration received is of equal or greater value.
- 5. Travel for Official Agency Business.** Certain payments made to an agency to cover the travel expenses of an employee who travels in the course of carrying out agency business are not gifts to the official because these payments do not provide a “personal benefit” to the official. For this exception to apply, the agency must report the payment on a Form 801 and the amount and purpose for using the payments are restricted by the provisions set forth in Regulation 18950.1.
- 6. Campaign Contribution.** A payment for travel that constitutes a campaign contribution to an official (Sections 82015, 82028(b)(4); Regulations 18215, 18942(a)(4), 18950(a) and 18950.3(a)), and permissible expenditures of campaign funds for campaign-related travel (Regulations 18950(a) and 18950.3(b)), provided they comply and are properly reported in accordance with applicable campaign finance laws.

**7. Travel Payments Fulfilling Terms of Contract.** Payments made to a governmental entity for travel expenses that are required to fulfill the terms of a contract. Neither the governmental entity nor the public official has a reporting obligation because consideration has been provided. (Section 82028; *Ratto* Advice Letter, No. I-14-057.)

**Certain Travel Payments are Reportable and may Subject the Official to Possible Conflicts of Interest, but are not Subject to the \$630 Gift Limit or Honoraria Ban of the Act.**

Reporting	C/I § 87100	Honoraria Ban	\$630 Gift Limit
Yes	Yes	No	No

**Travel for a Public Purpose Under Section 89506(a).** Any payments for actual transportation expenses and related lodging and subsistence that are made for a purpose reasonably related to: (1) A legislative or governmental purpose, or (2) An issue of state, national, or international policy so long as the travel is either:

(a) *Travel for Speech.* In connection with a speech given by the official and the lodging and subsistence expenses are limited to the day immediately proceeding, the day of, and the day immediately following the speech and the travel is within the United States, or

(b) *Travel paid for by government agency or 501(c)(3) organization.* Provided by a government agency or authority, (including a foreign government), a bona fide public or private educational institution as defined in Section 203 of the Revenue and Taxation Code, or a nonprofit organization that qualifies under Section 501(c)(3) of the Internal Revenue Code or a foreign organization that substantially satisfies the criteria of that section.

These payments are still reportable on the Form 700 and may create a conflict of interest issue for the official.

#### **Payments for Travel in Connection with a Business**

Reporting	C/I § 87100	Honoraria Ban	\$630 Gift Limit
Yes - as Income	Yes	No	No

Payments for travel made in connection with personal services rendered by the official if the services are provided in connection with a bona fide business, trade, or profession — such as teaching, practicing law, medicine, insurance, real estate, banking, or building contracting — and the services are customarily provided in connection with the business, trade, or profession. (Section 89506(d)(3) and Regulations 18950(a) and 18950.2.)

# Loans

Personal loans received by certain local officials are subject to limits and other restrictions, and in some circumstances, a personal loan that is not being repaid or is being repaid below certain amounts may become a gift to the official who received it.

## Limitations on Loans from Agency Officials, Consultants, and Contractors

**Officials Must Not Receive Loans from Agency Staff.** If the public official is a local elected officer or an official specified in Section 87200 (see page 2), they may not receive a personal loan that exceeds \$250 at any given time from an officer, employee, member, or consultant of their government agency or an agency over which their agency exercises direction and control. (Section 87460(a) and (b).)

**Officials Must Not Receive Loans from Agency Contractors.** In addition, the public official may not receive a personal loan that exceeds \$250 at any given time from any individual or entity that has a contract with their government agency or an agency over which their agency exercises direction and control. This limitation does not apply to loans received from banks or other financial institutions, and retail or credit card transactions, made in the normal course of business on terms available to members of the public without regard to their official status. (Section 87460(c) and (d).)

## Loans to Elected Officials Must be in Writing

In addition to the limitations above, if the public official is elected, they may not receive a personal loan of \$500 or more unless the loan is made in writing and clearly states the terms of the loan. The loan document must include the names of the parties to the loan agreement, as well as the date, amount, interest rate, and term of the loan. The loan document must also include the date or dates when payments are due and the amount of the payments. (Section 87461.)

## The following loans are not subject to these limits and documentation requirements:

1. **Campaign Loans.** Loans received by an elected officer's or candidate's campaign committee.
2. **Loans from Family Members.** Loans received from the public official's spouse, child, parent, grandparent, brother, sister, parent-in-law, brother-in-law, sister-in-law, nephew, niece, aunt, uncle, or first cousin, or the spouse of any such person unless they are acting as an agent or intermediary for another person not covered by this exemption.

## Loans as Gifts

Under the following circumstances, a personal loan received by **any** public official (elected and other officials specified in Section 87200, as well as any other local official or employee required to file statements of economic interests) may become a gift and subject to gift reporting and limitations:

1. If the loan has a defined date or dates for repayment and has not been repaid, the loan will become a gift when the statute of limitations for filing an action for default has expired.
2. If the loan has no defined date or dates for repayment, the loan will become a gift if it remains unpaid when one year has elapsed from the later of:
  - The date the loan was made;
  - The date the last payment of \$100 or more was made on the loan; or
  - The date upon which the public official has made payments aggregating to less than \$250 during the previous 12 months. (Section 87462.)

**The following loans will not become gifts:**

- A loan made to an elected officer's or candidate's campaign committee. This loan would, however, be a campaign contribution and must be reported accordingly.
- A loan described above on which the creditor has taken reasonable action to collect the balance due.
- A loan described above on which the creditor, based on reasonable business considerations, has not undertaken collection action. (However, except in a criminal action, the creditor has the burden of proving that the decision not to take collection action was based on reasonable business considerations.)
- A loan made to an official who has filed for bankruptcy and the loan is ultimately discharged in bankruptcy.



**Beaumont-Cherry Valley Water District  
Personnel Committee  
June 17, 2025**

**Item 6b**

**STAFF REPORT**

**TO:** Personnel Committee

**FROM:** Ren Berioso, Human Resources Manager

**SUBJECT: Policies and Procedures Manual Updates / Revisions establishing Information Technology Policy 7009 Drone Usage**

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**Staff Recommendation**

Recommend the establishment of Information Technology (IT) Policy 7009 Drone Usage (policy) to move forward to the next Board of Directors meeting, or direct staff as desired.

**Executive Summary**

Staff proposes IT Policy 7009 Drone Usage to establish clear guidelines for safe, legal, and consistent drone operations that comply with federal, state, and cybersecurity standards, protecting BCVWD from regulatory and privacy risks. It also supports the District's mission by fostering secure, efficient, and responsible use of drone technology for infrastructure monitoring and data collection.

**Background**

At the November 19, 2024 meeting, the Director of IT requested the Personnel Committee to review the Employee IT Policy Handbook to ensure alignment with the District's strategic goals, legal requirements, and regulatory standards. In partnership with IT, Human Resources (HR) staff facilitated the review and presented the proposed policy draft to Legal Counsel to ensure compliance with applicable labor laws. The handbook and the IT and Cybersecurity Policy Manual, both updated annually, outline technology policies, security measures, and employee expectations aligned with the NIST framework and industry best practices. These efforts have strengthened BCVWD's cybersecurity framework and contributed to the District receiving the MISAC award for excellence in IT governance for the past two years.

As part of the ongoing review process of all District policies, HR staff, in partnership with IT Department presented the proposed policy draft to Legal Counsel to ensure compliance with applicable Federal, State and local labor laws.

**Discussion**

The Drone Usage policy is crucial because it ensures drones are operated safely, legally, and responsibly, protecting the District's assets, data, and public trust.

Table A, Summary of Policy Sections, outlines the proposed Drone Usage policy that was drafted by HR and IT Departments.



Table A – Summary of Policy Sections

TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Policy Section and Language to Consider	Fiscal Impact of Section
1	No Section	NIST and CPRA	BCVWD follows the NIST best practices and CPRA standards.	<b>Consider establishing Section 7009.1</b> Introduction	No fiscal impact.
2	No Section	NIST	BCVWD has been compliant in operating all drone types (including aerial and underwater) used for District business.	<b>Consider establishing Section 7009.2</b> Purpose	No fiscal impact.
3	No Section	NIST	This policy applies to all employees, contractors, and third parties who involved in the procurement, operation, or management of drones used on behalf of the District.	<b>Consider establishing Section 7009.3</b> Scope	No fiscal impact.
4	No Section	NIST	District drone use is restricted to IT-approved, properly registered, insured, and inventoried drones, with third-party operators required to provide proof of insurance when applicable.	<b>Consider establishing Section 7009.4.1.a to e</b> Authorization and Registration	No fiscal impact.
5	No Section	NIST	Drone operators must be certified and District-trained, with training records verified by IT and filed in HR.	<b>Consider establishing Section 7009.4.2.a to c</b> Operator Qualifications	No fiscal impact.
6	No Section	NIST	BCVWD currently requires Drone operations comply with all safety regulations, obtain proper consent, and cease in unsafe conditions.	<b>Consider establishing Section 7009.4.3.a to d</b> Operational Restrictions and Safety	No fiscal impact.



TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Policy Section and Language to Consider	Fiscal Impact of Section
7	No Section	NIST and CPRA	Drone data is District property, must be securely stored, and collected with respect for privacy laws.	<b>Consider establishing Section 7009.4.4.a to c</b> Data Collection and Privacy	No fiscal impact.
8	No Section	NIST	BCVWD mandates NIST-compliant drone security, IT-approved software, secure access, prompt incident reporting, and record retention	<b>Consider establishing Section 7009.4.5.a to e</b> Security and Cyber Risk	No fiscal impact.
9	No Section	NIST	BCVWD requires Contractors operating drones for BCVWD must comply with policy terms, including licensing, insurance, cybersecurity, and data transfer.	<b>Consider establishing Section 7009.4.6.a to c</b> Third-Party Contractors	No fiscal impact.
10	No Section	NIST	BCVWD strictly prohibits personal, unauthorized, and non-District business drone use.	<b>Consider establishing Section 7009.4.7.a to c</b> Prohibited Activities	No fiscal impact.
11	No Section	NIST	BCVWD's IT Department reviews and updates the Drone Usage Policy annually to ensure compliance, safety, and alignment with evolving regulations.	<b>Consider establishing Section 7009.5</b> Review and Revision Policy	

**Fiscal Impact:** None.

#### **Attachments**

1. Proposed new Policy 7009: Drone Usage (policy)
2. NIST: Understanding the Cybersecurity Framework

Staff Report prepared by Ren Berioso, Human Resources Manager

# Attachment 1

**POLICY TITLE:     DRONE USAGE**  
**POLICY NUMBER:   7009**

**7009.1   Introduction.** Beaumont-Cherry Valley Water District (BCVWD) employs drone technologies, including aerial and submersible (underwater) platforms, to enhance operational efficiency, safety, and infrastructure monitoring. This policy ensures that the use of drone technology complies with federal and state regulations, aligns with National Institute of Standards and Technology (NIST) security principles, and supports the District's mission in a secure, responsible, and ethical manner.

**7009.2   Purpose .** The purpose of this policy is to establish guidelines for the safe, authorized, and compliant operation of drones used for District business. It applies to all forms of drone technology, including aerial and underwater drones, used for imaging, inspection, or data collection.

**7009.3   Scope.** This policy applies to all BCVWD departments, employees, contractors, and third-party service providers involved in the procurement, operation, or management of drones used on behalf of the District.

## **7009.4   Policy Details**

### **7009.4.1   Authorization and Registration**

- a. Only drones explicitly approved by the Information Technology Department may be used for District purposes.
- b. All drones must be registered with the appropriate regulatory authority, such as the Federal Aviation Administration (FAA), where applicable.
- c. A designated inventory of drones, including serial numbers and authorized users, will be maintained by the IT Department.
- d. All District-owned drones must be covered under a current insurance policy that includes appropriate liability, damage, and equipment loss coverage.
- e. Third-party operators must provide proof of insurance with sufficient coverage limits, naming BCVWD as an additional insured when required by contract or project scope.

### **7009.4.2   Operator Qualifications**

- a. Drone operators must hold a valid FAA Part 107 Remote Pilot Certificate (for aerial drones) or equivalent qualification as applicable.
- b. Only personnel who have completed District-approved training on drone safety and operational procedures may operate drones.
- c. A record of training and certification must be maintained and verified by the Information Technology Department and stored in the personnel file located with the Human Resources Department.

### **7009.4.3   Operational Restrictions and Safety**

- a. Drones must not be flown over private property, individuals, or restricted areas without proper clearance or consent.
- b. Flights must comply with FAA altitude restrictions, no-fly zones, and airspace classification rules.
- c. Underwater drones must not be deployed without prior approval and an appropriate safety and recovery plan.
- d. Drone operations must be suspended immediately in unsafe conditions (e.g., high winds, electrical storms, poor visibility).

### **7009.4.4   Data Collection and Privacy**

- a. Drone footage, images, or sensor data are considered District property and must be stored in District-approved systems.



- b. Data must not be distributed externally without prior authorization.
- c. All drone operations must respect individual privacy rights and comply with CPRA and applicable data protection regulations.

#### **7009.4.5 Security and Cyber Risk**

- a. Drones with data storage or wireless communication capabilities must be configured in accordance with NIST security standards.
- b. Only firmware and software approved by the IT Department may be installed on drone systems.
- c. Unauthorized network-connected drones or non-secure remote access capabilities are prohibited.
- d. If a drone is lost, damaged, or suspected to have been compromised, the incident must be reported immediately to the IT Department for risk assessment and response.
- e. Flight logs, operational records, and mission data must be retained for at least one year and stored in a District-approved system.

#### **7009.4.6 Third-Party Contractors**

- a. Contractors operating drones on behalf of BCVWD must sign an agreement confirming adherence to this policy.
- b. Third-party operators must provide proof of current FAA licensing, insurance coverage, and cybersecurity safeguards.
- c. All collected data must be transferred to BCVWD at project completion and may not be retained without explicit written permission.

#### **7009.4.7 Prohibited Activities**

- a. Personal drone use on District property is prohibited.
- b. Drones may not be used for surveillance, monitoring employees, or capturing unauthorized footage.
- c. Use of drones for recreational, non-operational, or commercial purposes unrelated to District business is not permitted.

**7009.5 Review and Revision Policy.** The Information Technology Department will review the "Drone Usage Policy" annually to ensure it remains aligned with evolving regulations, technologies, and District needs. During this review, the policy will be evaluated for compliance with FAA Part 107 rules, cybersecurity standards (e.g., NIST), CPRA, and California law. Any necessary revisions will be made to maintain legal compliance, operational safety, and data security.

### Understanding

# THE NIST CYBERSECURITY FRAMEWORK

## You may have heard about the NIST Cybersecurity Framework, but what exactly is it?

And does it apply to you?

NIST is the National Institute of Standards and Technology at the U.S. Department of Commerce. The NIST Cybersecurity Framework helps

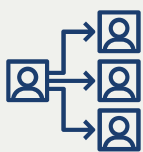
businesses of all sizes better understand, manage, and reduce their cybersecurity risk and protect their networks and data. The Framework is voluntary. It gives your business an outline of best practices to help you decide where to focus your time and money for cybersecurity protection.

You can put the NIST Cybersecurity Framework to work in your business in these five areas: Identify, Protect, Detect, Respond, and Recover.

## 1. IDENTIFY

Make a list of all equipment, software, and data you use, including laptops, smartphones, tablets, and point-of-sale devices.

Create and share a company cybersecurity policy that covers:



Roles and responsibilities for employees, vendors, and anyone else with access to sensitive data.



Steps to take to protect against an attack and limit the damage if one occurs.

## 2. PROTECT

- Control who logs on to your network and uses your computers and other devices.
- Use security software to protect data.
- Encrypt sensitive data, at rest and in transit.
- Conduct regular backups of data.
- Update security software regularly, automating those updates if possible.
- Have formal policies for safely disposing of electronic files and old devices.
- Train everyone who uses your computers, devices, and network about cybersecurity. You can help employees understand their personal risk in addition to their crucial role in the workplace.

LEARN MORE AT:  
[FTC.gov/SmallBusiness](https://FTC.gov/SmallBusiness)



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### 3. DETECT



Monitor your computers for unauthorized personnel access, devices (like USB drives), and software.



Check your network for unauthorized users or connections.



Investigate any unusual activities on your network or by your staff.

### 4. RESPOND

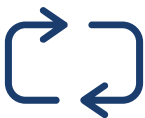
#### Have a plan for:

- Notifying customers, employees, and others whose data may be at risk.
- Keeping business operations up and running.
- Reporting the attack to law enforcement and other authorities.
- Investigating and containing an attack.
- Updating your cybersecurity policy and plan with lessons learned.
- Preparing for inadvertent events (like weather emergencies) that may put data at risk.

#### Test your plan regularly.

### 5. RECOVER

#### After an attack:



Repair and restore the equipment and parts of your network that were affected.



Keep employees and customers informed of your response and recovery activities.

For more information on the NIST Cybersecurity Framework and resources for small businesses, go to [NIST.gov/CyberFramework](https://NIST.gov/CyberFramework) and [NIST.gov/Programs-Projects/Small-Business-Corner-SBC](https://NIST.gov/Programs-Projects/Small-Business-Corner-SBC).

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**Beaumont-Cherry Valley Water District  
Personnel Committee  
June 17, 2025**

**Item 6c**

**STAFF REPORT**

**TO:** Personnel Committee

**FROM:** Ren Berioso, Human Resources Manager

**SUBJECT: Policies and Procedures Manual Updates / Revisions establishing Information Technology Policy 7010 Electronic Signature**

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**Staff Recommendation**

Recommend the establishment of Information Technology (IT) Policy 7010 Electronic Signature (policy) to move forward to the next Board of Directors meeting, or direct staff as desired.

**Executive Summary**

Staff proposes IT Policy 7010 Electronic Signature to establish clear guidelines to ensure that electronic signatures used in BCVWD operations are secure, legally binding, and compliant with federal and California regulations, thereby protecting the integrity of District business processes. Additionally, it enhances operational efficiency and accountability by aligning with NIST cybersecurity standards and the California Public Records Act, ensuring responsible IT use and public transparency.

**Background**

At the November 19, 2024 meeting, the Director of IT requested the Personnel Committee to review the Employee IT Policy Handbook to ensure alignment with the District's strategic goals, legal requirements, and regulatory standards. In partnership with IT, Human Resources (HR) staff facilitated the review and presented the proposed policy draft to Legal Counsel to ensure compliance with applicable labor laws. The handbook and the IT and Cybersecurity Policy Manual, both updated annually, outline technology policies, security measures, and employee expectations aligned with the NIST framework and industry best practices. These efforts have strengthened BCVWD's cybersecurity framework and contributed to the District receiving the MISAC award for excellence in IT governance for the past two years.

As part of the ongoing review process of all District policies, HR staff, in partnership with IT Department presented the proposed policy draft to Legal Counsel to ensure compliance with applicable Federal, State and local labor laws.

**Discussion**

The Electronic Signature policy is significant because it ensures secure, legally binding electronic signatures that comply with all relevant regulations and support efficient, transparent District operations.

Table A, Summary of Policy Sections, outlines the proposed Electronic Signature policy that was drafted by HR and IT Departments.



Table A – Summary of Policy Sections

TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Policy Section and Language to Consider	Fiscal Impact of Section
1	No Section	NIST CPRA	BCVWD follows the NIST best practices and the applicable laws.	<b>Consider establishing Section 7010.1</b> Introduction	No fiscal impact.
2	No Section	Uniform Electronic Transactions Act (UETA) of 1999  CA Gov't Code Section 16.5	BCVWD has been compliant with the applicable laws in securing electronic signatures with District-related tasks and documents.	<b>Consider establishing Section 7010.2</b> Purpose	No fiscal impact.
3	No Section	NIST	This policy applies to anyone at BCVWD involved in using electronic signatures for official District documents.	<b>Consider establishing Section 7010.3</b> Scope	No fiscal impact.
4	No Section	NIST	Only IT-approved platforms with robust security features are currently used for District electronic signatures.	<b>Consider establishing Section 7010.4.1.a to c</b> Approved Signature Platforms	No fiscal impact.
5	No Section	Uniform Electronic Transactions Act (UETA) of 1999  CA Gov't Code Section 16.5	BCVWD follows the applicable laws.	<b>Consider establishing Section 7010.4.2.a to b</b> Legal and Regulatory Compliance	No fiscal impact.
6	No Section	NIST	BCVWD requires all Electronic signatures to have IT-managed digital certificates for identity verification, secure storage, event logging, and timely revocation	<b>Consider establishing Section 7010.4.3.a to d</b> Identity Verification and Security	No fiscal impact.



TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Policy Section and Language to Consider	Fiscal Impact of Section
7	No Section	NIST and CPRA	BCVWD requires electronically signed documents be securely stored, retained per BCVWD policy, and protected for integrity	<b>Consider establishing Section 7010.4.4.a to c</b> Document Control and Records Retention	No fiscal impact.
8	No Section	NIST	IT manages electronic signature platforms and logs, while employees must report credential issues promptly	<b>Consider establishing Section 7010.4.5.a to b</b> Roles and Responsibilities	No fiscal impact.
9	No Section	NIST	BCVWD requires Electronic signatures to be used only by the authorized signer for official District business. Misuse of credentials is prohibited.	<b>Consider establishing Section 7010.4.6.a to c</b> Prohibited Activities	No fiscal impact.
10	No Section	NIST	BCVWD's IT Department will annually review and update the Electronic Signature Policy to ensure regulatory compliance and alignment with District needs.	<b>Consider establishing Section 7010.5</b> Review and Revision Policy	

### **Fiscal Impact**

There is no fiscal impact in the establishment of this policy.

### **Attachments**

1. Proposed new Policy 7010: Electronic Signature
2. Uniform Electronic Transactions Act (UETA) of 1999
3. CA Government Code Section 16.5

Staff Report prepared by Ren Berioso, Human Resources Manager

# Attachment 1

**POLICY TITLE: ELECTRONIC SIGNATURE**  
**POLICY NUMBER: 7010**

**7010.1 Introduction.** Beaumont-Cherry Valley Water District (BCVWD) relies on Information Technology (IT) resources as essential tools for conducting business efficiently and securely. This policy ensures these resources are used responsibly, ethically, and in alignment with the National Institute of Standards and Technology (NIST) principles, which provide a framework for cybersecurity and data protection. As a California Special District, BCVWD adheres to state regulations, including compliance with the California Public Records Act (CPRA) to ensure transparency and accountability in public records management. This policy also aligns with legal requirements for the use of electronic signatures in governmental operations.

**7010.2 Purpose .** The purpose of this policy is to define the standards, procedures, and controls for the use of electronic signatures in official District business. The policy ensures that electronic signatures are legally binding, secure, and compliant with federal and California state laws, including the Uniform Electronic Transactions Act (UETA), the California Government Code §16.5, and other applicable legal frameworks.

**7010.3 Scope.** This policy applies to all BCVWD employees, contractors, vendors, and third parties who generate, sign, approve, or process official District documents using electronic signatures. It covers internal workflows and external communications where signatures are required.

## **7010.4 Policy Details**

### **7010.4.1 Approved Signature Platforms**

- a. Only electronic signature solutions approved by the Information Technology Department may be used.
- b. Approved platforms must support identity verification, audit trails, access control, and cryptographic protection.
- c. Unauthorized platforms or tools are prohibited for signing District-related documents.

### **7010.4.2 Legal and Regulatory Compliance**

- a. All electronic signatures must comply with:
  - California Government Code §16.5
  - California Uniform Electronic Transactions Act (UETA)
  - Federal Electronic Signatures in Global and National Commerce (E-SIGN) Act
- b. Electronic signatures must only be used where legally permissible and not for documents that require notarization unless specifically authorized by law.

### **7010.4.3 Identity Verification and Security**

- a. Digital certificates issued and managed by the Information Technology Department must be used to authenticate signer identity and secure signatures.
- b. Employees must coordinate with the Information Technology Department for certificate issuance, renewal, and secure storage.
- c. All electronic signature events must be logged and include the signer's identity, date/time, and document hash or audit trail.
- d. Digital certificates must be revoked immediately upon employee separation, role change, or suspected compromise. The Information Technology Department shall maintain a certificate revocation list and ensure deprovisioning occurs within 24 hours of notification.

### **7010.4.4 Document Control and Records Retention**

- a. Electronically signed documents must be retained in accordance with BCVWD's Electronic Data Retention and Records Management Policy.
- b. Signed documents must be stored in secure District-managed file systems.

- c. Platforms used must ensure document integrity through cryptographic validation or signature locking.

#### **7010.4.5 Roles and Responsibilities**

- a. The Information Technology Department is responsible for approving platforms, issuing digital certificates, and maintaining audit logs.
- b. Employees must report any suspected misuse or loss of certificate credentials to the IT Department immediately.

#### **7010.4.6 Prohibited Activities**

- a. Electronic signatures must not be applied by anyone other than the authorized signer.
- b. Use of another employee's digital certificate or login credentials is strictly prohibited.
- c. Electronic signatures must not be used for non-District business.

**7010.5 Review and Revision Policy.** The Information Technology Department will review the "Electronic Signature Policy" annually to ensure it remains current and effective in addressing the needs of the organization and any changes in legal, regulatory, or technological requirements. During the review process, the policy will be evaluated for its effectiveness, compliance with relevant regulations, alignment with the National Institute of Standards and Technology (NIST), and adherence to applicable local, state, and federal laws. Necessary updates or revisions will be made to ensure the policy continues to meet the District's requirements and supports its mission.



**UNIFORM ELECTRONIC  
TRANSACTIONS ACT (1999)**

Drafted by the

NATIONAL CONFERENCE OF COMMISSIONERS  
ON UNIFORM STATE LAWS

and by it

APPROVED AND RECOMMENDED FOR ENACTMENT  
IN ALL THE STATES

at its

ANNUAL CONFERENCE  
MEETING IN ITS ONE-HUNDRED-AND-EIGHTH YEAR  
IN DENVER, COLORADO  
JULY 23 – 30, 1999

*WITH PREFATORY NOTE AND COMMENTS*

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By

NATIONAL CONFERENCE OF COMMISSIONERS  
ON UNIFORM STATE LAWS

*Approved by the American Bar Association*

*Dallas, Texas, February 14, 2000*

1/20/00

## **UNIFORM ELECTRONIC TRANSACTIONS ACT (1999)**

The Committee that acted for the National Conference of Commissioners on Uniform State Laws in preparing the Uniform Electronic Transactions Act (1999) was as follows:

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## **UNIFORM ELECTRONIC TRANSACTIONS ACT (1999)**

**SECTION 1. SHORT TITLE.** This [Act] may be cited as the Uniform Electronic Transactions Act.

**SECTION 2. DEFINITIONS.** In this [Act]:

- (1) “Agreement” means the bargain of the parties in fact, as found in their language or inferred from other circumstances and from rules, regulations, and procedures given the effect of agreements under laws otherwise applicable to a particular transaction.
- (2) “Automated transaction” means a transaction conducted or performed, in whole or in part, by electronic means or electronic records, in which the acts or records of one or both parties are not reviewed by an individual in the ordinary course in forming a contract, performing under an existing contract, or fulfilling an obligation required by the transaction.
- (3) “Computer program” means a set of statements or instructions to be used directly or indirectly in an information processing system in order to bring about a certain result.
- (4) “Contract” means the total legal obligation resulting from the parties’ agreement as affected by this [Act] and other applicable law.
- (5) “Electronic” means relating to technology having electrical, digital, magnetic, wireless, optical, electromagnetic, or similar capabilities.
- (6) “Electronic agent” means a computer program or an electronic or other automated means used independently to initiate an action or respond to electronic records or performances in whole or in part, without review or action by an individual.

- (7) “Electronic record” means a record created, generated, sent, communicated, received, or stored by electronic means.
- (8) “Electronic signature” means an electronic sound, symbol, or process attached to or logically associated with a record and executed or adopted by a person with the intent to sign the record.
- (9) “ Governmental agency” means an executive, legislative, or judicial agency, department, board, commission, authority, institution, or instrumentality of the federal government or of a State or of a county, municipality, or other political subdivision of a State.
- (10) “Information” means data, text, images, sounds, codes, computer programs, software, databases, or the like.
- (11) “Information processing system” means an electronic system for creating, generating, sending, receiving, storing, displaying, or processing information.
- (12) “Person” means an individual, corporation, business trust, estate, trust, partnership, limited liability company, association, joint venture, governmental agency, public corporation, or any other legal or commercial entity.
- (13) “Record” means information that is inscribed on a tangible medium or that is stored in an electronic or other medium and is retrievable in perceivable form.
- (14) “Security procedure” means a procedure employed for the purpose of verifying that an electronic signature, record, or performance is that of a specific person or for detecting changes or errors in the information in an electronic record. The term includes a procedure that requires the use of algorithms or other codes, identifying words or numbers, encryption, or callback or other acknowledgment procedures.
- (15) “State” means a State of the United States, the District of Columbia, Puerto Rico, the United States Virgin Islands, or any territory or insular possession subject to the jurisdiction of the

United States. The term includes an Indian tribe or band, or Alaskan native village, which is recognized by federal law or formally acknowledged by a State.

(16) “Transaction” means an action or set of actions occurring between two or more persons relating to the conduct of business, commercial, or governmental affairs.

### **SECTION 3. SCOPE.**

(a) Except as otherwise provided in subsection (b), this [Act] applies to electronic records and electronic signatures relating to a transaction.

(b) This [Act] does not apply to a transaction to the extent it is governed by:

(1) a law governing the creation and execution of wills, codicils, or testamentary trusts;

(2) [The Uniform Commercial Code other than Sections 1-107 and 1-206, Article 2, and Article 2A];

(3) [the Uniform Computer Information Transactions Act]; and

(4) [other laws, if any, identified by State].

(c) This [Act] applies to an electronic record or electronic signature otherwise excluded from the application of this [Act] under subsection (b) to the extent it is governed by a law other than those specified in subsection (b).

(d) A transaction subject to this [Act] is also subject to other applicable substantive law.

**SECTION 4. PROSPECTIVE APPLICATION.** This [Act] applies to any electronic record or electronic signature created, generated, sent, communicated, received, or stored on or after the effective date of this [Act].

**SECTION 5. USE OF ELECTRONIC RECORDS AND ELECTRONIC SIGNATURES; VARIATION BY AGREEMENT.**

(a) This [Act] does not require a record or signature to be created, generated, sent, communicated, received, stored, or otherwise processed or used by electronic means or in electronic form.

(b) This [Act] applies only to transactions between parties each of which has agreed to conduct transactions by electronic means. Whether the parties agree to conduct a transaction by electronic means is determined from the context and surrounding circumstances, including the parties' conduct.

(c) A party that agrees to conduct a transaction by electronic means may refuse to conduct other transactions by electronic means. The right granted by this subsection may not be waived by agreement.

(d) Except as otherwise provided in this [Act], the effect of any of its provisions may be varied by agreement. The presence in certain provisions of this [Act] of the words "unless otherwise agreed", or words of similar import, does not imply that the effect of other provisions may not be varied by agreement.

(e) Whether an electronic record or electronic signature has legal consequences is determined by this [Act] and other applicable law.

**SECTION 6. CONSTRUCTION AND APPLICATION.** This [Act] must be construed and applied:

- (1) to facilitate electronic transactions consistent with other applicable law;
- (2) to be consistent with reasonable practices concerning electronic transactions and with the continued expansion of those practices; and

(3) to effectuate its general purpose to make uniform the law with respect to the subject of this [Act] among States enacting it.

**SECTION 7. LEGAL RECOGNITION OF ELECTRONIC RECORDS,  
ELECTRONIC SIGNATURES, AND ELECTRONIC CONTRACTS.**

- (a) A record or signature may not be denied legal effect or enforceability solely because it is in electronic form.
- (b) A contract may not be denied legal effect or enforceability solely because an electronic record was used in its formation.
- (c) If a law requires a record to be in writing, an electronic record satisfies the law.
- (d) If a law requires a signature, an electronic signature satisfies the law.

**SECTION 8. PROVISION OF INFORMATION IN WRITING;  
PRESENTATION OF RECORDS.**

- (a) If parties have agreed to conduct a transaction by electronic means and a law requires a person to provide, send, or deliver information in writing to another person, the requirement is satisfied if the information is provided, sent, or delivered, as the case may be, in an electronic record capable of retention by the recipient at the time of receipt. An electronic record is not capable of retention by the recipient if the sender or its information processing system inhibits the ability of the recipient to print or store the electronic record.
- (b) If a law other than this [Act] requires a record (i) to be posted or displayed in a certain manner, (ii) to be sent, communicated, or transmitted by a specified method, or (iii) to contain information that is formatted in a certain manner, the following rules apply:
  - (1) The record must be posted or displayed in the manner specified in the other law.

(2) Except as otherwise provided in subsection (d)(2), the record must be sent, communicated, or transmitted by the method specified in the other law.

(3) The record must contain the information formatted in the manner specified in the other law.

(c) If a sender inhibits the ability of a recipient to store or print an electronic record, the electronic record is not enforceable against the recipient.

(d) The requirements of this section may not be varied by agreement, but:

(1) to the extent a law other than this [Act] requires information to be provided, sent, or delivered in writing but permits that requirement to be varied by agreement, the requirement under subsection (a) that the information be in the form of an electronic record capable of retention may also be varied by agreement; and

(2) a requirement under a law other than this [Act] to send, communicate, or transmit a record by [first-class mail, postage prepaid] [regular United States mail], may be varied by agreement to the extent permitted by the other law.

## **SECTION 9. ATTRIBUTION AND EFFECT OF ELECTRONIC RECORD AND ELECTRONIC SIGNATURE.**

(a) An electronic record or electronic signature is attributable to a person if it was the act of the person. The act of the person may be shown in any manner, including a showing of the efficacy of any security procedure applied to determine the person to which the electronic record or electronic signature was attributable.

(b) The effect of an electronic record or electronic signature attributed to a person under subsection (a) is determined from the context and surrounding circumstances at the time of its



creation, execution, or adoption, including the parties' agreement, if any, and otherwise as provided by law.

**SECTION 10. EFFECT OF CHANGE OR ERROR.** If a change or error in an electronic record occurs in a transmission between parties to a transaction, the following rules apply:

(1) If the parties have agreed to use a security procedure to detect changes or errors and one party has conformed to the procedure, but the other party has not, and the nonconforming party would have detected the change or error had that party also conformed, the conforming party may avoid the effect of the changed or erroneous electronic record.

(2) In an automated transaction involving an individual, the individual may avoid the effect of an electronic record that resulted from an error made by the individual in dealing with the electronic agent of another person if the electronic agent did not provide an opportunity for the prevention or correction of the error and, at the time the individual learns of the error, the individual:

(A) promptly notifies the other person of the error and that the individual did not intend to be bound by the electronic record received by the other person;

(B) takes reasonable steps, including steps that conform to the other person's reasonable instructions, to return to the other person or, if instructed by the other person, to destroy the consideration received, if any, as a result of the erroneous electronic record; and

(C) has not used or received any benefit or value from the consideration, if any, received from the other person.

(3) If neither paragraph (1) nor paragraph (2) applies, the change or error has the effect provided by other law, including the law of mistake, and the parties' contract, if any.

(4) Paragraphs (2) and (3) may not be varied by agreement.

**SECTION 11. NOTARIZATION AND ACKNOWLEDGMENT.** If a law requires a signature or record to be notarized, acknowledged, verified, or made under oath, the requirement is satisfied if the electronic signature of the person authorized to perform those acts, together with all other information required to be included by other applicable law, is attached to or logically associated with the signature or record.

**SECTION 12. RETENTION OF ELECTRONIC RECORDS;  
ORIGINALS.**

(a) If a law requires that a record be retained, the requirement is satisfied by retaining an electronic record of the information in the record which:

(1) accurately reflects the information set forth in the record after it was first generated in its final form as an electronic record or otherwise; and

(2) remains accessible for later reference.

(b) A requirement to retain a record in accordance with subsection (a) does not apply to any information the sole purpose of which is to enable the record to be sent, communicated, or received.

(c) A person may satisfy subsection (a) by using the services of another person if the requirements of that subsection are satisfied.

(d) If a law requires a record to be presented or retained in its original form, or provides consequences if the record is not presented or retained in its original form, that law is satisfied by an electronic record retained in accordance with subsection (a).

(e) If a law requires retention of a check, that requirement is satisfied by retention of an electronic record of the information on the front and back of the check in accordance with subsection (a).

- (f) A record retained as an electronic record in accordance with subsection
- (a) satisfies a law requiring a person to retain a record for evidentiary, audit, or like purposes, unless a law enacted after the effective date of this [Act] specifically prohibits the use of an electronic record for the specified purpose.
- (g) This section does not preclude a governmental agency of this State from specifying additional requirements for the retention of a record subject to the agency's jurisdiction.

**SECTION 13. ADMISSIBILITY IN EVIDENCE.** In a proceeding, evidence of a record or signature may not be excluded solely because it is in electronic form.

**SECTION 14. AUTOMATED TRANSACTION.** In an automated transaction, the following rules apply:

- (1) A contract may be formed by the interaction of electronic agents of the parties, even if no individual was aware of or reviewed the electronic agents' actions or the resulting terms and agreements.
- (2) A contract may be formed by the interaction of an electronic agent and an individual, acting on the individual's own behalf or for another person, including by an interaction in which the individual performs actions that the individual is free to refuse to perform and which the individual knows or has reason to know will cause the electronic agent to complete the transaction or performance.
- (3) The terms of the contract are determined by the substantive law applicable to it.

**SECTION 15. TIME AND PLACE OF SENDING AND RECEIPT.**

- (a) Unless otherwise agreed between the sender and the recipient, an electronic record is sent when it:

(1) is addressed properly or otherwise directed properly to an information processing system that the recipient has designated or uses for the purpose of receiving electronic records or information of the type sent and from which the recipient is able to retrieve the electronic record;

(2) is in a form capable of being processed by that system; and

(3) enters an information processing system outside the control of the sender or of a person that sent the electronic record on behalf of the sender or enters a region of the information processing system designated or used by the recipient which is under the control of the recipient.

(b) Unless otherwise agreed between a sender and the recipient, an electronic record is received when:

(1) it enters an information processing system that the recipient has designated or uses for the purpose of receiving electronic records or information of the type sent and from which the recipient is able to retrieve the electronic record; and

(2) it is in a form capable of being processed by that system.

(c) Subsection (b) applies even if the place the information processing system is located is different from the place the electronic record is deemed to be received under subsection (d).

(d) Unless otherwise expressly provided in the electronic record or agreed between the sender and the recipient, an electronic record is deemed to be sent from the sender's place of business and to be received at the recipient's place of business. For purposes of this subsection, the following rules apply:

(1) If the sender or recipient has more than one place of business, the place of business of that person is the place having the closest relationship to the underlying transaction.

(2) If the sender or the recipient does not have a place of business, the place of business is the sender's or recipient's residence, as the case may be.

(e) An electronic record is received under subsection (b) even if no individual is aware of its receipt.

(f) Receipt of an electronic acknowledgment from an information processing system described in subsection (b) establishes that a record was received but, by itself, does not establish that the content sent corresponds to the content received.

(g) If a person is aware that an electronic record purportedly sent under subsection (a), or purportedly received under subsection (b), was not actually sent or received, the legal effect of the sending or receipt is determined by other applicable law. Except to the extent permitted by the other law, the requirements of this subsection may not be varied by agreement.

## **SECTION 16. TRANSFERABLE RECORDS.**

(a) In this section, “transferable record” means an electronic record that:

(1) would be a note under [Article 3 of the Uniform Commercial Code] or a document under [Article 7 of the Uniform Commercial Code] if the electronic record were in writing; and

(2) the issuer of the electronic record expressly has agreed is a transferable record.

(b) A person has control of a transferable record if a system employed for evidencing the transfer of interests in the transferable record reliably establishes that person as the person to which the transferable record was issued or transferred.

(c) A system satisfies subsection (b), and a person is deemed to have control of a transferable record, if the transferable record is created, stored, and assigned in such a manner that:

(1) a single authoritative copy of the transferable record exists which is unique, identifiable, and, except as otherwise provided in paragraphs (4), (5), and

(6), unalterable;

(2) the authoritative copy identifies the person asserting control as:

- (A) the person to which the transferable record was issued; or
- (B) if the authoritative copy indicates that the transferable record has been transferred, the person to which the transferable record was most recently transferred;
- (3) the authoritative copy is communicated to and maintained by the person asserting control or its designated custodian;
- (4) copies or revisions that add or change an identified assignee of the authoritative copy can be made only with the consent of the person asserting control;
- (5) each copy of the authoritative copy and any copy of a copy is readily identifiable as a copy that is not the authoritative copy; and
- (6) any revision of the authoritative copy is readily identifiable as authorized or unauthorized.
- (d) Except as otherwise agreed, a person having control of a transferable record is the holder, as defined in [Section 1-201(20) of the Uniform Commercial Code], of the transferable record and has the same rights and defenses as a holder of an equivalent record or writing under [the Uniform Commercial Code], including, if the applicable statutory requirements under [Section 3-302(a), 7-501, or 9-308 of the Uniform Commercial Code] are satisfied, the rights and defenses of a holder in due course, a holder to which a negotiable document of title has been duly negotiated, or a purchaser, respectively. Delivery, possession, and indorsement are not required to obtain or exercise any of the rights under this subsection.
- (e) Except as otherwise agreed, an obligor under a transferable record has the same rights and defenses as an equivalent obligor under equivalent records or writings under [the Uniform Commercial Code].
- (f) If requested by a person against which enforcement is sought, the person seeking to enforce the transferable record shall provide reasonable proof that the person is in control of the

transferable record. Proof may include access to the authoritative copy of the transferable record and related business records sufficient to review the terms of the transferable record and to establish the identity of the person having control of the transferable record.

**[SECTION 17. CREATION AND RETENTION OF ELECTRONIC RECORDS AND CONVERSION OF WRITTEN RECORDS BY GOVERNMENTAL AGENCIES.** [Each governmental agency] [The [designated state officer]] of this State shall determine whether, and the extent to which, [it] [a governmental agency] will create and retain electronic records and convert written records to electronic records.]

**[SECTION 18. ACCEPTANCE AND DISTRIBUTION OF ELECTRONIC RECORDS BY GOVERNMENTAL AGENCIES.**

(a) Except as otherwise provided in Section 12(f), [each governmental agency] [the [designated state officer]] of this State shall determine whether, and the extent to which, [it] [a governmental agency] will send and accept electronic records and electronic signatures to and from other persons and otherwise create, generate, communicate, store, process, use, and rely upon electronic records and electronic signatures.

(b) To the extent that a governmental agency uses electronic records and electronic signatures under subsection (a), the [governmental agency] [designated state officer], giving due consideration to security, may specify:

- (1) the manner and format in which the electronic records must be created, generated, sent, communicated, received, and stored and the systems established for those purposes;
- (2) if electronic records must be signed by electronic means, the type of electronic signature required, the manner and format in which the electronic signature must be affixed to the

electronic record, and the identity of, or criteria that must be met by, any third party used by a person filing a document to facilitate the process;

(3) control processes and procedures as appropriate to ensure adequate preservation, disposition, integrity, security, confidentiality, and auditability of electronic records; and

(4) any other required attributes for electronic records which are specified for corresponding nonelectronic records or reasonably necessary under the circumstances.

(c) Except as otherwise provided in Section 12(f), this [Act] does not require a governmental agency of this State to use or permit the use of electronic records or electronic signatures.]

**[SECTION 19. INTEROPERABILITY.** The [governmental agency] [designated officer] of this State which adopts standards pursuant to Section 18 may encourage and promote consistency and interoperability with similar requirements adopted by other governmental agencies of this and other States and the federal government and nongovernmental persons interacting with governmental agencies of this State. If appropriate, those standards may specify differing levels of standards from which governmental agencies of this State may choose in implementing the most appropriate standard for a particular application.]

**SECTION 20. SEVERABILITY CLAUSE.** If any provision of this [Act] or its application to any person or circumstance is held invalid, the invalidity does not affect other provisions or applications of this [Act] which can be given effect without the invalid provision or application, and to this end the provisions of this [Act] are severable.

**SECTION 21. EFFECTIVE DATE.** This [Act] takes effect .....



[Home](#) [About Us](#) [Regulations](#) [Current Regulations](#) [Technology](#) [Digital Signatures](#)

## Government Code section 16.5

- (a) In any written communication with a public entity, as defined in Section 811.2, in which a signature is required or used, any party to the communication may affix a signature by use of a digital signature that complies with the requirements of this section. The use of a digital signature shall have the same force and effect as the use of a manual signature if and only if it embodies all of the following attributes:
- (1) It is unique to the person using it.
  - (2) It is capable of verification.
  - (3) It is under the sole control of the person using it.
  - (4) It is linked to data in such a manner that if the data are changed, the digital signature is invalidated.
  - (5) It conforms to regulations adopted by the Secretary of State.

Initial regulations shall be adopted no later than January 1, 1997. In developing these regulations, the secretary shall seek the advice of public and private entities, including, but not limited to, the Department of Information Technology, the California Environmental Protection Agency, and the Department of General Services. Before the secretary adopts the regulations, he or she shall hold at least one public hearing to receive comments.

- (b) The use or acceptance of a digital signature shall be at the option of the parties. Nothing in this section shall require a public entity to use or permit the use of a digital signature.
- (c) Digital signatures employed pursuant to Section 71066 of the Public Resources Code are exempted from this section.
- (d) "Digital signature" means an electronic identifier, created by computer, intended by the party using it to have the same force and effect as the use of a manual signature.



**Beaumont-Cherry Valley Water District  
Personnel Committee  
June 17, 2025**

**Item 6d**

**STAFF REPORT**

**TO:** Personnel Committee

**FROM:** Ren Berioso, Human Resources Manager

**SUBJECT: Policies and Procedures Manual Updates / Revisions establishing Information Technology Policy 7012 Accessibility**

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**Staff Recommendation**

Recommend the establishment of Information Technology (IT) Policy 7012 Accessibility (policy) to move forward to the next Board of Directors meeting, or direct staff as desired.

**Executive Summary**

Staff proposes IT Policy 7012 Accessibility to establish clear guidelines that ensure all digital resources, including websites, applications, and documents are accessible to individuals with disabilities, in compliance with federal and state regulations. This policy establishes clear standards and procedures for creating, maintaining, and procuring accessible digital content while supporting BCVWD's commitment to transparency, equity, and public service.

**Background**

At the November 19, 2024 meeting, the Director of IT requested the Personnel Committee to review the Employee IT Policy Handbook to ensure alignment with the District's strategic goals, legal requirements, and regulatory standards. In partnership with IT, Human Resources (HR) staff facilitated the review and presented the proposed policy draft to Legal Counsel to ensure compliance with applicable labor laws. The handbook and the IT and Cybersecurity Policy Manual, both updated annually, outline technology policies, security measures, and employee expectations aligned with the NIST framework and industry best practices. These efforts have strengthened BCVWD's cybersecurity framework and contributed to the District receiving the MISAC award for excellence in IT governance for the past two years.

As part of the ongoing review process of all District policies, HR staff, in partnership with IT Department presented the proposed policy draft to Legal Counsel to ensure compliance with applicable Federal, State and local labor laws.

**Discussion**

The Accessibility policy is significant because it ensures equal access to BCVWD's digital resources for all users, including those with disabilities, while maintaining legal compliance and public trust.

Table A, Summary of Policy Sections, outlines the proposed Accessibility policy that was drafted by HR and IT Departments.



Table A – Summary of Policy Sections

TABLE A	State / Federal Law requirement	BCVWD current practice	Policy Section and Language to Consider	Fiscal Impact of Section
1	<b>NIST CPRA</b>	BCVWD follows the NIST best practices and the applicable laws.	<b>Consider establishing Section 7012.1</b> Introduction	No fiscal impact.
2	<b>Americans with Disabilities Act (ADA)</b>  <b>Section 508 Rehabilitation Act</b>  <b>Web Content Accessibility Guidelines</b>	BCVWD has been compliant with the applicable laws in ensuring all digital resources are accessible to all users.	<b>Consider establishing Section 7012.2</b> Purpose	No fiscal impact.
3	<b>NIST</b>	This policy covers all digital resources and people involved in creating, managing, or delivering BCVWD's digital content.	<b>Consider establishing Section 7012.3</b> Scope	No fiscal impact.
4	<b>NIST</b>  <b>WCAG 2.1 Level AA</b>	BCVWD requires digital resources and services meet WCAG 2.1 Level AA standards and be reviewed and tested for accessibility compliance.	<b>Consider establishing Section 7012.4.1.a to f</b> Accessibility Standards and Compliance	No fiscal impact.
5	<b>NIST</b>	BCVWD requires employees to ensure their digital content meets accessibility standards, receive training, and report any issues to IT.	<b>Consider establishing Section 7012.4.2.a to c</b> Employee Responsibilities	No fiscal impact.
6	<b>NIST</b>	BCVWD requires all third-party vendors comply with BCVWD's accessibility standards, include contractual clauses, and provide a VPAT when required.	<b>Consider establishing Section 7012.4.3.a to c</b> Procurement and Vendor Requirements	No fiscal impact.



TABLE A	State / Federal Law requirement	BCVWD current practice	Policy Section and Language to Consider	Fiscal Impact of Section
7	NIST and CPRA	IT will audit digital properties for accessibility compliance, document and correct issues, and prioritize fixing legacy content.	<b>Consider establishing Section 7012.4.4.a to c</b> Remediation and Monitoring	No fiscal impact.
8	NIST	BCVWD has always ensured public reporting of accessibility barriers and prompt responses to accommodation requests through coordinated department efforts.	<b>Consider establishing Section 7012.4.6.a to b</b> Public Feedback and Accommodation Requests	No fiscal impact.
9	Americans with Disabilities Act (ADA)  NIST	BCVWD follows the law.	<b>Consider establishing Section 7012.4.6.a to c</b> Legal and Regulatory Compliance	No fiscal impact.
10	NIST	The IT Department will annually review and update the Accessibility Policy to maintain legal compliance and operational effectiveness.	<b>Consider establishing Section 7012.5</b> Review and Revision Policy	No fiscal impact.

**Fiscal Impact:** None.

### **Attachments**

1. Proposed new Policy 7010: Electronic Signature (policy)
2. Section 508 of the Rehabilitation Act of 1973 as Amended
3. Guidance on Web Accessibility and the ADA

Staff Report prepared by Ren Berioso, Human Resources Manager

# Attachment 1

**POLICY TITLE: ACCESSIBILITY**  
**POLICY NUMBER: 7012**

**7012.1 Introduction.** Beaumont-Cherry Valley Water District (BCVWD) relies on Information Technology (IT) resources as essential tools for conducting business efficiently and securely. This policy ensures these resources are used responsibly, ethically, and in alignment with the National Institute of Standards and Technology (NIST) principles, which provide a framework for cybersecurity and data protection. As a California Special District, BCVWD adheres to state regulations, including compliance with the California Public Records Act (CPRA) to ensure transparency and accountability in public records management. This policy also supports the District's obligation to provide accessible digital services to all individuals, including those with disabilities.

**7012.2 Purpose .** The purpose of this policy is to establish requirements and best practices that ensure BCVWD's digital resources, including websites, applications, and electronic documents, are accessible to all users regardless of disability. The policy aligns with applicable accessibility standards and legal requirements, including Section 508 of the Rehabilitation Act, the Americans with Disabilities Act (ADA), and Web Content Accessibility Guidelines (WCAG) 2.1.

**7012.3 Scope.** This policy applies to all digital platforms, services, systems, applications, and content developed, maintained, or procured by BCVWD, including internal and public-facing resources. It covers employees, contractors, third-party vendors, and consultants involved in creating, managing, or delivering digital content or IT systems.

## **7012.4 Policy Details**

### **7012.4.1 Accessibility Standards and Compliance**

- a. All BCVWD digital resources must meet or exceed WCAG 2.1 Level AA conformance standards.
- b. Procured digital services and products must be reviewed by the Information Technology Department for accessibility compliance prior to publishing on any district website or resource.
- c. Electronic documents (e.g., PDFs, Word documents, presentations) shared internally or with the public must be designed for accessibility, including appropriate headings, alt text, readable fonts, and tagged structures.
- d. All new web applications and content must be tested for accessibility using automated and manual tools prior to deployment.
- e. Accessibility will be considered throughout the system lifecycle, from design and procurement to maintenance and decommissioning.
- f. Mobile accessibility standards must be met when required by law, regulation, or contractual obligation.

### **7012.4.2 Employee Responsibilities**

- a. Employees who create or manage digital content are responsible for ensuring their work complies with accessibility standards.
- b. Training on accessible content creation and inclusive design practices will be made available to relevant staff.
- c. Any known accessibility issues must be reported to the Information Technology Department for review and resolution.

### **7012.4.3 Procurement and Vendor Requirements**

- a. All third-party vendors and contractors developing or hosting digital services for BCVWD must comply with accessibility requirements outlined in this policy and in procurement documents.
- b. Contracts must include accessibility clauses that mandate WCAG 2.1 compliance, Section 508 compatibility, and remediation timelines.

- c. Vendors must provide a Voluntary Product Accessibility Template (VPAT) upon request or when submitting solutions for approval.

#### **7012.4.4 Remediation and Monitoring**

- a. The Information Technology Department will routinely audit BCVWD's digital properties for accessibility compliance.
- b. Issues identified through audits, complaints, or user feedback must be documented and addressed with a corrective action plan.
- c. Legacy systems and content must be prioritized for remediation based on frequency of use, criticality, and visibility to the public.

#### **7012.4.5 Public Feedback and Accommodation Requests**

- a. BCVWD will provide clear mechanisms on its website and digital platforms for the public to report accessibility barriers or request accommodations.
- b. Requests for alternative formats or accessible services will be responded to promptly and handled in coordination with relevant departments (e.g. IT, Administration or Human Resources).

#### **7012.4.6 Legal and Regulatory Compliance**

- a. This policy supports compliance with the Americans with Disabilities Act (ADA), Section 508 of the Rehabilitation Act, California Government Code Sections 7405 and 11135, and other applicable federal and state mandates.
- b. Digital accessibility is considered a public service obligation under California law and BCVWD's transparency and equity commitments.
- c. Any security controls implemented on public-facing websites or digital services must not create unnecessary barriers to accessibility. Such controls must align with NIST guidance on balancing cybersecurity with usability and public access requirements.

**7012.5 Review and Revision Policy.** The Information Technology Department will review the "Accessibility Policy" annually to ensure it remains current and effective in addressing the needs of the organization and any changes in legal, regulatory, or technological requirements. During the review process, the policy will be evaluated for its effectiveness, compliance with relevant accessibility standards, alignment with the National Institute of Standards and Technology (NIST), and adherence to applicable state and federal laws. Necessary updates or revisions will be made to ensure the policy continues to meet the District's mission and obligations.

## Policy & Management

# Section 508 of the Rehabilitation Act, as amended

## 29 U.S.C. §794d. Electronic and Information Technology

### a. Requirements for Federal departments and agencies

#### 1. Accessibility

##### A. Development, procurement, maintenance, or use of electronic and information technology

When developing, procuring, maintaining, or using electronic and information technology, each Federal department or agency, including the United States Postal Service, shall ensure, unless an undue burden would be imposed on the department or agency, that the electronic and information technology allows, regardless of the type of medium of the technology —

- i. individuals with disabilities who are Federal employees to have access to and use of information and data that is comparable to the access to and use of the information and data by Federal employees who are not individuals with disabilities; and
- ii. individuals with disabilities who are members of the public seeking information or services from a Federal department or agency to have access to and use of information and data that is comparable to the access to and use of the information and data by such members of the public who are not individuals with disabilities.

##### B. Alternative means efforts

When development, procurement, maintenance, or use of electronic and information technology that meets the standards published by the Board under paragraph (2) would impose an undue burden, the Fed

[^ Top](#)

department or agency shall provide individuals with disabilities covered by paragraph (1) with the information and data involved by an alternative means of access that allows the individual to use the information and data.

## **2. Electronic and information technology standards**

### **A. In general**

Not later than 18 months after August 7, 1998, the Architectural and Transportation Barriers Compliance Board (referred to in this section as the "Access Board"), after consultation with the Secretary of Education, the Administrator of General Services, the Secretary of Commerce, the Chairman of the Federal Communications Commission, the Secretary of Defense, and the head of any other Federal department or agency that the Access Board determines to be appropriate, including consultation on relevant research findings, and after consultation with the electronic and information technology industry and appropriate public or nonprofit agencies or organizations, including organizations representing individuals with disabilities, shall issue and publish standards setting forth—

- i. for purposes of this section, a definition of electronic and information technology that is consistent with the definition of information technology specified in section 11101(6) of title 40; and
- ii. the technical and functional performance criteria necessary to implement the requirements set forth in paragraph (1).

### **B. Review and amendment**

The Access Board shall periodically review and, as appropriate, amend the standards required under subparagraph (A) to reflect technological advances or changes in electronic and information technology.

## **3. Incorporation of standards**

Not later than 6 months after the Access Board publishes the standards required under paragraph (2), the Federal Acquisition Regulatory Council shall revise the Federal Acquisition Regulation and each Federal department or agency shall revise the Federal procurement policies and directives under the control of the department or agency to incorporate those standards. Not later than 6 months after the Access Board revises any standards required under paragraph (2), the Council shall revise the Federal Acquisition Regulation and each appropriate Federal department or agency shall revise the procurement policies and directives, as necessary, to incorporate the revisions.

## **4. Acquisition planning**

In the event that a Federal department or agency determines that compliance with the standards issued by the Access Board under paragraph (2) relating to



procurement imposes an undue burden, the documentation by the department or agency supporting the procurement shall explain why compliance creates an undue burden.

## 5. **Exemption for national security systems**

This section shall not apply to national security systems, as that term is defined in section 11103(a) of title 40.

## 6. **Construction**

**A. Equipment** In a case in which the Federal Government provides access to the public to information or data through electronic and information technology, nothing in this section shall be construed to require a Federal department or agency —

- i. to make equipment owned by the Federal Government available for access and use by individuals with disabilities covered by paragraph (1) at a location other than that where the electronic and information technology is provided to the public; or
2. to purchase equipment for access and use by individuals with disabilities covered by paragraph (1) at a location other than that where the electronic and information technology is provided to the public.

## **B. Software and peripheral devices**

Except as required to comply with standards issued by the Access Board under paragraph (2), nothing in paragraph (1) requires the installation of specific accessibility-related software or the attachment of a specific accessibility-related peripheral device at a workstation of a Federal employee who is not an individual with a disability.

## **b. Technical assistance**

The Administrator of General Services and the Access Board shall provide technical assistance to individuals and Federal departments and agencies concerning the requirements of this section.

- c. Agency evaluations** Not later than 6 months after August 7, 1998, the head of each Federal department or agency shall evaluate the extent to which the electronic and information technology of the department or agency is accessible to and usable by individuals with disabilities described in subsection (a)(1) of this section, compared to the access to and use of the technology by individuals described in such subsection who are not individuals with disabilities, and submit a report containing the evaluation to the Attorney General.

## **d. Reports**

1. **Interim report** Not later than 18 months after August 7, 1998, the Attorney General shall prepare and submit to the President a report containing information on and

recommendations regarding the extent to which the electronic and information technology of the Federal Government is accessible to and usable by individuals with disabilities described in subsection (a)(1) of this section.

2. **Biennial reports** Not later than 3 years after August 7, 1998, and every 2 years thereafter, the Attorney General shall prepare and submit to the President and Congress a report containing information on and recommendations regarding the state of Federal department and agency compliance with the requirements of this section, including actions regarding individual complaints under subsection (f) of this section.

**e. Cooperation**

Each head of a Federal department or agency (including the Access Board, the Equal Employment Opportunity Commission, and the General Services Administration) shall provide to the Attorney General such information as the Attorney General determines is necessary to conduct the evaluations under subsection (c) of this section and prepare the reports under subsection (d) of this section.

**f. Enforcement**

**1. General**

- A. **Complaints** Effective 6 months after the date of publication by the Access Board of final standards described in subsection (a)(2) of this section, any individual with a disability may file a complaint alleging that a Federal department or agency fails to comply with subsection (a)(1) of this section in providing electronic and information technology.

**B. Application**

This subsection shall apply only to electronic and information technology that is procured by a Federal department or agency not less than 6 months after the date of publication by the Access Board of final standards described in subsection (a)(2) of this section.

**2. Administrative complaints**

Complaints filed under paragraph (1) shall be filed with the Federal department or agency alleged to be in noncompliance. The Federal department or agency receiving the complaint shall apply the complaint procedures established to implement section 794 of this title for resolving allegations of discrimination in a federally conducted program or activity.

**3. Civil actions**

The remedies, procedures, and rights set forth in sections 794a(a)(2) and 794a(b) of this title shall be the remedies, procedures, and rights available to any individual with a disability filing a complaint under paragraph (1).

**g. Application to other Federal laws**

This section shall not be construed to limit any right, remedy, or procedure otherwise available under any provision of Federal law (including sections 791 through 794a of this title) that provides greater or equal protection for the rights of individuals with disabilities than this section.

(Pub. L. 93–112, title V, §508, as added Pub. L. 99–506, title VI, §603(a), Oct. 21, 1986, 100 Stat. 1830; amended Pub. L. 100–630, title II, §206(f), Nov. 7, 1988, 102 Stat. 3312; Pub. L. 102–569, title V, §509(a), Oct. 29, 1992, 106 Stat. 4430; Pub. L. 105–220, title IV, §408(b), Aug. 7, 1998, 112 Stat. 1203; Pub. L. 106–246, div. B, title II, §2405, July 13, 2000, 114 Stat. 555.)

## **29 U.S.C. §794d–1. Reports on accessibility of electronic information to individuals with disabilities**

a.

1. Not later than 100 days after December 29, 2022, the Director of the Office of Management and Budget (in this section referred to as the "Director"), in coordination with the Architectural and Transportation Barriers Compliance Board and the Administrator of General Services (in this section referred to as the "Administrator"), shall disseminate amended or updated criteria and instructions to any Federal department or agency (in this section referred to as an "agency") covered by section 794d of this title for the evaluation required pursuant to paragraph (3)(B).
2. Such criteria and instructions shall —
  - A. include, at minimum, requirements that information technologies and digital services must—
    - i. conform to the technical standards referenced in subsection (a)(2)(A) of such section 794d of this title, as determined by appropriate conformance testing; and
    - ii. be accessible to and usable by individuals with disabilities as determined from consultation with individuals with disabilities, including those with visual, auditory, tactile, and cognitive disabilities, or members of any disability organization; and
  - B. provide guidance to agencies regarding the types and format of data and information to be submitted to the Director and the Administrator pursuant to paragraph (3), including how to submit such data and information, the metrics by which compliance will be assessed in the reports required in subsection (b), and any other directions necessary for agencies to demonstrate compliance

with accessibility standards for electronic and information technology procured and in use within an agency, as required by such section 794d of this title.

3. Not later than 225 days after December 29, 2022, the head of each agency shall —
  - A. evaluate the extent to which the electronic and information technology of the agency are accessible to and usable by individuals with disabilities described in subsection (a)(1) of such section 794d of this title compared to the access to and use of the technology and services by individuals described in such section who are not individuals with disabilities;
  - B. evaluate the electronic and information technology of the agency in accordance with the criteria and instructions provided in paragraph (1); and
  - C. submit a report containing the evaluations jointly to the Director and the Administrator.

b.

1. Not later than 1 year after December 29, 2022, and annually thereafter, the Administrator, in consultation with the Director, shall prepare and submit to the Committees on Appropriations and Homeland Security and Governmental Affairs of the Senate and the Committees on Appropriations and Oversight and Reform of the House of Representatives a report that shall include —
  - A. a comprehensive assessment (including information identifying the metrics and data used) of compliance by each agency, and by the Federal Government generally, with the criteria and instructions disseminated under subsection (a)(1);
  - B. a detailed description of the actions, activities, and other efforts made by the Administrator over the year preceding submission to support such compliance at agencies and any planned efforts in the coming year to improve compliance at agencies; and
  - C. a list of recommendations that agencies or Congress may take to help support that compliance.
2. The Administrator shall ensure that the reports required under this subsection are made available on a public website and are maintained as an open Government data asset (as that term is defined in section 3502 of title 44).

(Pub. L. 117–328, div. E, title VII, §752, Dec. 29, 2022, 136 Stat. 4719.)

**NOTE:** The preceding page is a reprint of Section 508 of the Rehabilitation Act:

- [29 U.S.C. §794d. Electronic and information technology | GovInfo.gov](https://www.section508.gov/law-and-policies/section-508-law/)

**ADA.gov**U.S. Department of Justice  
Civil Rights Division**Attachment 3**

# Guidance on Web Accessibility and the ADA

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March 18, 2022

**The guidance on this page does not reflect requirements for state and local governments that were published in the Federal Register on April 24, 2024. [Learn more about the new requirements.](#)**

This guidance describes how state and local governments and businesses open to the public can make sure that their websites are accessible to people with disabilities as required by the Americans with Disabilities Act (ADA).

## Guidance & Resources

Read this to get specific guidance about this topic.

For a beginner-level introduction to a topic, view [Topics](#)

For information about the legal requirements, visit [Law, Regulations & Standards](#)

[Learn more about businesses' and state and local governments' ADA responsibilities.](#)

# Why Website Accessibility Matters

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**Inaccessible web content means that people with disabilities are denied equal access to information. An inaccessible website can exclude people just as much as steps at an entrance to a physical location. Ensuring web accessibility for people with disabilities is a priority for the Department of Justice. In recent years, a multitude of services have moved online and people rely on websites like never before for all aspects of daily living. For example, accessing voting information, finding up-to-date health and safety resources, and looking up mass transit schedules and fare information increasingly depend on having access to websites.**

People with disabilities navigate the web in a variety of ways. People who are blind may use screen readers, which are devices that speak the text that appears on a screen. People who are deaf or hard of hearing may use captioning. And people whose disabilities affect their ability to grasp and use a mouse may use voice recognition software to control their computers and other devices with verbal commands.

The ways that websites are designed and set up can create unnecessary barriers that make it difficult or impossible for people with disabilities to use websites, just as physical barriers like steps can prevent some people with disabilities from entering a building. These barriers on the web keep people with disabilities from accessing information and programs that businesses and state and local governments make available to the public online. But these barriers can be prevented or removed so that websites are accessible to people with disabilities.

# Examples of Website Accessibility Barriers

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- **Poor color contrast.** People with limited vision or color blindness cannot read text if there is not enough contrast between the text and background (for example, light gray text on a light-colored background).
- **Use of color alone to give information.** People who are color-blind may not have access to information when that information is conveyed using only color cues because they cannot distinguish certain colors from others. Also, screen readers do not tell the user the color of text on a screen, so a person who is blind would not be able to know that color is meant to convey certain information (for example, using red text alone to show which fields are required on a form).
- **Lack of text alternatives (“alt text”) on images.** People who are blind will not be able to understand the content and purpose of images, such as pictures, illustrations, and charts, when no text alternative is provided. Text alternatives convey the purpose of an image, including pictures, illustrations, charts, etc.
- **No captions on videos.** People with hearing disabilities may not be able to understand information communicated in a video if the video does not have captions.
- **Inaccessible online forms.** People with disabilities may not be able to fill out, understand, and accurately submit forms without things like:
  - Labels that screen readers can convey to their users (such as text that reads “credit card number” where that number should be entered);
  - Clear instructions; and
  - Error indicators (such as alerts telling the user a form field is missing or incorrect).
- **Mouse-only navigation (lack of keyboard navigation).** People with disabilities who cannot use a mouse or trackpad will not be able to access



**Beaumont-Cherry Valley Water District  
Personnel Committee Meeting  
June 17, 2025**

**Item 7**

**STAFF REPORT**

**TO:** Personnel Committee

**FROM:** Ren Berioso, Human Resources Manager

**SUBJECT:** Policy Tracking Matrix Progress Dashboard

**Staff Recommendation**

Approve the policies pending review in the next one to two months, identified on Table 3, Policy to Work on for Subsequent Meetings, or to direct staff as desired.

**Background**

At the October 17, 2023 meeting, staff was directed by the Personnel Committee to create a dashboard to outline the progress of the Policies and Procedures Manual updates since year 2021. At the November 21, 2023 meeting, the Personnel Committee approved a dashboard presented by staff which highlights the summary of all policies approved and drafted, and those policies that staff are working on for subsequent meetings.

At the March 18, 2025 meeting, HR staff reported to the Personnel Committee that all personnel-related policies had reached 100 percent completion following the adoption of the final set of policies by the Board of Directors at the March 12, 2025 Regular Board Meeting. However, HR staff recognize that policies must evolve in response to ongoing developments within the District. Following a comprehensive audit, HR staff identified that certain policies require further refinement to ensure staff and leadership have clear, complete, and practical guidance.

**Discussion:**

***Table 1-Summary of Policy Approval Tracking (All Policies)***

Department	On Matrix	Draft Created	Committee / Board Reviewed Drafts	Board Approved	% Complete
Board Administration	26	23	17	17	65.38%
Engineering	8	8	1	1	12.50%
Finance	15	15	11	9	60.00%
Human Resources	69	69	65 <sup>1</sup>	65	94.20%
Information Technology (Personnel-Related)	18	18	15	12	66.67%
TOTALS	136	136	108	104	76.47%

<sup>1</sup> Human Resources identified 3 Personnel policies that are outdated based on current District practices and applicable laws.





**Table 2 – Recommended Policies to be added to the Policy Matrix**

Item	Policy Subject	Policy Contents
None		

**Table 3 – Policies To Work on for Subsequent Meetings**

Item	Policy No.	Priorities Listed	Draft Size	Selected for Processing	Estimated Committee Presentation
1	3000	Employee Status	2 pages	June	July
2	3005	Compensation	2 pages	June	July
3	3010	Employee Performance Evaluation	2 pages	June	July
4	7013	Personally Identifiable Information	2 pages	June	July
5	7014	Artificial Intelligence (AI)	2 pages	June	July

*Numbered for ease of selection and reference, not for level of priority.*

### **Fiscal Impact**

There is no financial impact.

### **Attachments**

1. Policy Approval Tracking Matrix

Staff Report prepared by Ren Berioso, Human Resources Manager

Policy Approval Tracking  
BCVWD Policy Manual Project

Policy Number	New Policy Number	Section	Policy Name	HR's Recommendation Responsible Department	Drafted by BCVWD Staff	Approved by Legal Counsel	Presented to Committee	Provisionally Approved by Committee	Presented to Board of Directors	Approved by Board of Directors	Adoption Date	Resolution Number
	1000	General	Definitions	Human Resources	Yes	6/28/2021	7/19/2021	7/20/2021	10/13/2021	10/13/2021	10/13/2021	2021-018
2	1005	General	Contractual Provisions	Human Resources	Yes	2/16/2021	2/22/2021	2/22/2021	4/14/2021	4/14/2021	4/14/2021	2021-006
	1010	General	Policy Manual	Human Resources	Yes	N/A	N/A	N/A	1/8/2025	1/8/2025	1/8/2025	2025-001
3	2000	Administration	Equal Opportunity	Human Resources	Yes	3/15/2021	3/22/2021	3/22/2021	4/14/2021	4/14/2021	4/14/2021	2021-006
5	2010	Administration	Access to Personnel Records	Human Resources	Yes	3/15/2021	3/22/2021	3/22/2021	4/14/2021	4/14/2021	4/14/2021	2021-006
6	2015	Personnel	Harassment	Human Resources	Yes	1/2/2024	1/16/2024	1/16/2024	2/14/2024	2/14/2024	2/14/2024	2024-006
7	2020	Administration	Sexual Harassment	Human Resources	Yes	3/15/2021	3/22/2021	3/22/2021	4/14/2021	4/14/2021	4/14/2021	2021-006
N/A	2025	Administration	Whistleblower Protection	Human Resources	Yes	3/15/2021	3/22/2021	3/22/2021	4/14/2021	4/14/2021	4/14/2021	2021-006
8	3000	Personnel	Employee Status	Human Resources	Yes	5/29/2025						
N/A	3001	Personnel	Employee Information and Emergency	Human Resources	Yes	4/12/2021	6/21/2021	6/21/2021	10/13/2021	10/13/2021	10/13/2021	2021-018
N/A	3002	Personnel	Employee Groups	Human Resources	Yes	4/12/2021	5/17/2021	5/17/2021	10/13/2021	10/13/2021	10/13/2021	2021-018
9	3005	Personnel	Compensation	Human Resources	Yes	5/29/2025						
N/A	3006	Personnel	Prevailing Wage-Public Works Contractor-	Human Resources	Yes	7/13/2021	9/20/2021	9/20/2021	10/13/2021	10/13/2021	10/13/2021	2021-018
10 & 49	3010	Personnel	Employee Performance Evaluation	Human Resources	Yes	5/29/2025						
11	3015	Personnel	Performance Evaluation-General	Human Resources	Yes	8/3/2021	9/20/2021	9/20/2021	10/13/2021	10/13/2021	10/13/2021	2021-018
12	3020	Personnel	Health and Welfare Benefits	Human Resources	Yes	5/10/2022	5/17/2022	5/17/2022	6/8/2022	6/8/2022	6/8/2022	2022-019
13	3025	Personnel	Pay Periods	Human Resources	Yes	10/12/2021	11/15/2021	11/15/2021	5/11/2022	5/11/2022	5/11/2022	2022-016
14	3030	Personnel	Gift Acceptance Guidelines	Human Resources	Yes	6/3/2025	6/17/2025	Yes				
15	3035	Personnel	Outside Employment	Human Resources	Yes	10/12/2021	4/19/2022	4/19/2022	5/11/2022	5/11/2022	5/11/2022	2022-016
16	3040	Personnel	Letters of Recommendation	Human Resources	Yes	6/28/2024	7/16/2024	7/16/2024	8/14/2024	8/14/2024	8/14/2024	2024-012
17	3045	Personnel	Executive Officer	Human Resources	Yes	7/29/2024	8/20/2024	11/21/2024	1/8/2025	1/8/2025	1/8/2025	2025-001
18	3050	Personnel	Volunteer Personnel Workers'	Human Resources	Yes	5/2/2024	6/18/2024	7/16/2024	8/14/2024	8/14/2024	8/14/2024	2024-012
19	3055	Personnel	Work Hours, Overtime, and Standby	Human Resources	Yes	6/14/2022	7/19/2022	7/19/2022	9/14/2022	9/14/2022	9/14/2022	2022-028
	3060	Personnel	Continuity of Service	Human Resources	Yes	4/8/2024	4/16/2024	5/16/2024	5/16/2024	5/16/2024	5/16/2024	2024-007
20 (incorrect)	3065	Personnel	Reduction in Force	Human Resources	Yes	5/2/2024	6/18/2024	6/18/2024	7/10/2024	7/10/2024	7/10/2024	2024-010
21	3070	Personnel	Holidays	Human Resources	Yes	1/2/2024	1/16/2024	1/16/2024	2/14/2024	2/14/2024	2/14/2024	2024-002
22	3075	Personnel	Vacation	Human Resources	Yes	11/8/2022	1/17/2023	1/17/2023	2/8/2023	2/8/2023	2/8/2023	2023-005
24	3085	Personnel	Sick Leave	Human Resources	Yes	4/8/2024	1/16/2024	4/16/2024	5/16/2024	5/16/2024	5/16/2024	2024-007
25	3090	Personnel	Family and Medical Leave	Human Resources	Yes	10/2/2024	11/21/2024	11/21/2024	1/8/2025	1/8/2025	1/8/2025	2025-001
26	3095	Personnel	Pregnancy Disability Leave	Human Resources	Yes	9/1/2022	9/20/2022	9/20/2022	12/14/2022	12/14/2022	12/14/2022	2022-043
N/A	3096	Personnel	Lactation Accommodation	Human Resources	Yes	8/25/2022	9/20/2022	9/20/2022	12/14/2022	12/14/2022	12/14/2022	2022-043
27	3100	Personnel	Bereavement Leave	Human Resources	Yes	5/10/2022	5/17/2022	5/17/2022	6/8/2022	6/8/2022	6/8/2022	2022-019
28	3105	Personnel	Personal Leave of Absence	Human Resources	Yes	6/28/2024	7/16/2024	7/16/2024	8/14/2024	8/14/2024	8/14/2024	2024-012
29	3110	Personnel	Jury and Witness Duty	Human Resources	Yes	10/5/2023	10/17/2023	11/21/2023	12/13/2023	12/13/2023	1/10/2024	2023-031
N/A	3111	Personnel	Members, and Victims of Domestic	Human Resources	Yes	12/6/2024	2/18/2025	2/18/2025	3/11/2025	3/11/2025	3/11/2025	2025-008
30	3115	Personnel	Return to Work Policy	Human Resources	Yes	1/11/2023	1/17/2023	1/17/2023	2/8/2023	2/8/2023	2/8/2023	2023-005
31	3120	Personnel	Occupational Injury and Illness	Human Resources	Yes	1/11/2023	1/17/2023	1/17/2023	2/8/2023	2/8/2023	2/8/2023	2023-005
N/A	3121	Personnel	Infectious Disease Control	Human Resources	Yes	2/2/2023	2/21/2023	2/21/2023	3/15/2023	3/15/2023	3/15/2023	2023-009
N/A	3122	Personnel	Workplace Violence	Human Resources	Yes	1/2/2024	1/16/2024	1/16/2024	2/14/2024	2/14/2024	2/14/2024	2024-002
32	3125	Personnel	Uniforms and Protective Clothing	Human Resources	Yes	3/14/2023	3/21/2023	4/18/2023	5/10/2023	5/10/2023	5/10/2023	2023-013
33	3130	Personnel	Employee Training, Education and	Human Resources	Yes	6/29/2024	7/16/2024	8/20/2024	9/17/2024	9/17/2024	9/17/2024	2024-014
34	3135	Personnel	Occupational Certification and	Human Resources	Yes	6/14/2022	8/16/2022	8/16/2022	9/17/2022	9/17/2022	9/14/2022	2022-028
N/A	3136	Personnel	Succession and Workforce Planning	Human Resources	Yes	9/10/2024	9/18/2024	9/18/2024	10/9/2024	10/9/2024	10/9/2024	2024-018
35	3140	Personnel	Respiratory Protection Program	Human Resources	Yes	6/29/2024	7/16/2024	7/16/2024	8/14/2024	8/14/2024	8/14/2024	2024-012
36	3145	Personnel	Driver Training and Record Review	Human Resources	Yes	10/2/2024	11/19/2024	1/21/2025	2/12/2025	2/12/2025	2/12/2025	2025-004
37	3150	Personnel	District Vehicle Usage	Human Resources	Yes	2/5/2024	3/19/2024	4/16/2024	5/16/2024	5/16/2024	5/16/2024	2024-007
38	3151	Personnel	Personal Vehicle Usage	Human Resources		2/5/2024	3/19/2024	3/19/2024	4/10/2024	4/10/2024	4/10/2024	2024-006
39	3160	Personnel	HIPAA Compliance and Security Officer	Human Resources	Yes	5/2/2024	6/18/2024	6/18/2024	7/10/2024	7/10/2024	7/10/2024	2024-010
41	3170	Personnel	Smoke Free Workplace and Tobacco	Human Resources	Yes	2/5/2024	3/19/2024	3/19/2024	4/10/2024	4/10/2024	4/10/2024	2024-006
42	3175	Personnel	Disciplinary Action or Terminations	Human Resources	Yes	6/29/2024	7/16/2024	8/20/2024	9/17/2024	9/17/2024	9/17/2024	2024-014
Proposed	3176	Personnel	Transfers and Voluntary Demotion	Human Resources	Yes	9/10/2024	9/18/2024	9/18/2024	10/9/2024	10/9/2024	10/9/2024	2024-018
43	3180	Personnel	Nepotism-Employment of Relatives	Human Resources	Yes	4/8/2024	4/16/2024	6/18/2024	7/10/2024	7/10/2024	7/10/2024	2024-010
44	3185	Personnel	Employee Separation	Human Resources	Yes	5/2/2024	6/18/2024	6/18/2024	7/10/2024	7/10/2024	7/10/2024	2024-010
47	3200	Personnel	Grievance Procedures	Human Resources	Yes	5/2/2024	6/18/2024	6/18/2024	7/10/2024	7/10/2024	7/10/2024	2024-010
48	3205	Personnel	Substance Abuse	Human Resources	Yes	12/6/2021	4/19/2022	4/19/2022	5/11/2022	5/11/2022	5/11/2022	2022-016
N/A	3206	Personnel	FMCSA Clearinghouse Registration	Human Resources	No	12/6/2021	4/19/2022	4/19/2022	5/11/2022	5/11/2022	5/11/2022	2022-016

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50	3215	Personnel	Personnel Action Form (PAF)	Human Resources	Yes	4/8/2024	4/16/2024	4/16/2024	5/16/2024	5/16/2024	5/16/2024	2024-007
51	3220	Personnel	Recruitment, Selection and Onboarding	Human Resources	Yes	2/5/2024	3/19/2024	3/19/2024	4/10/2024	4/10/2024	4/10/2024	2024-006
N/A	3225	Personnel	Employee Leave Donation Program and	Human Resources	Yes	2019	2019	2019	10/9/2019	10/9/2019	10/9/2019	2019-011
N/A	3230	Personnel	Workers' Compensation	Human Resources	Yes	5/9/2023	5/16/2023	5/16/2023	6/14/2023	6/14/2023	6/14/2023	2023-017
N/A	3231	Personnel	Accommodations for Disability	Human Resources	No	5/9/2023	5/16/2023	5/16/2023	6/14/2023	6/14/2023	6/14/2023	2023-017
N/A	3235	Personnel	Military Leave	Human Resources	Yes	6/14/2023	8/15/2023	11/21/2023	12/13/2023	12/13/2023	1/10/2024	2023-031
N/A	3240	Personnel	Dress Code and Personal Standards	Human Resources	Yes	4/8/2024	4/16/2024	4/16/2024	5/16/2024	5/16/2024	5/16/2024	2024-007
N/A	3255	Personnel	Other Mandated Leaves of Absence	Human Resources	No	9/10/2024	9/18/2024	9/18/2024	10/9/2024	10/9/2024	10/9/2024	2024-018
1	4005	Board of Directors	Basis of Authority	Administration	Yes	1/25/2025	2/17/2025	2/17/2025	4/12/2025	4/12/2025	4/12/2025	2025-010
2	4010	Board of Directors	Members of the Board of Directors	Administration	Yes	1/25/2025	2/17/2025	3/17/2025	4/12/2025	4/12/2025	4/12/2025	2025-010
3	4015	Board of Directors	Committees of the Board of Directors	Administration	Yes	3/5/2025	3/17/2025	3/17/2025	4/12/2025	4/12/2025	4/12/2025	2025-010
4	4020	Board of Directors	Duties of Board President and Officers	Administration	Yes	1/25/2025	2/17/2025	2/18/2025	4/12/2025	4/12/2025	4/12/2025	2025-010
5	4025	Board of Directors	Board Meetings	Administration	Yes	3/5/2025	2/18/2025	3/17/2025	4/12/2025	4/12/2025	4/12/2025	2025-010
6	4030	Board of Directors	Board Meeting Agendas	Administration	Yes	1/25/2025	2/18/2025	3/17/2025	4/12/2025	4/12/2025	4/12/2025	2025-010
7	4035	Board of Directors	Board Meeting Conduct and Decorum	Administration	Yes	N/A	1/13/2025	1/13/2025	1/23/2025	1/23/2025	1/23/2025	2025-002
8	4040	Board of Directors	Board Actions and Decisions	Administration	Yes	1/25/2025	2/17/2025	3/17/2025	4/12/2025	4/12/2025	4/12/2025	2025-010
9	4045	Board of Directors	Attendance at Meetings	Administration	Yes	4/30/2025	5/13/2025	5/13/2025				
10	4050	Board of Directors	Minutes of Board Meetings	Administration	Yes	4/30/2025	5/13/2025	5/13/2025				
11	4055	Board of Directors	Rules of Order for Board and	Administration	Yes	3/5/2025	3/17/2025	3/17/2025	4/12/2025	4/12/2025	4/12/2025	2025-010
12	4060	Board of Directors	Training, Education and Conferences	Administration	Yes	4/10/2025	4/16/2025	4/16/2025	5/14/2025	5/15/2025	5/15/2025	2025-014
13 & 16	4065	Board of Directors	Remuneration / Director Per Diem Fees	Administration	Yes	4/10/2025	4/16/2025	4/16/2025	5/14/2025	5/15/2025	5/15/2025	2025-014
14	4070	Board of Directors	Payment or Reimbursement of	Administration	Yes	4/10/2025	4/16/2025	4/16/2025	5/14/2025	5/15/2025	5/15/2025	2025-014
15	4075	Board of Directors	Expenditure Reimbursement Procedure	Administration	Yes	4/10/2025	4/16/2025	4/16/2025	5/14/2025	5/15/2025	5/15/2025	2025-014
17	4080	Board of Directors	Membership in Associations	Administration	Yes	4/30/2025	5/13/2025	5/13/2025				
18	4085	Board of Directors	Ethics Training	Administration	Yes	4/30/2025	5/13/2025	5/13/2025				
19	4090	Board of Directors	Code of Ethics	Administration	Yes	5/20/2025	6/10/2025					
20	4095	Board of Directors	Ethics Policy	Administration	Yes	5/20/2025	6/10/2025					
N/A	4100	Board of Directors	Electronic Communications and Data Devices at Dais	Administration	Yes	6/28/2021	N/A	Directed to Full Board	7/14/2021	7/14/2021	7/14/2021	2021-011
N/A	4110	Board of Directors	Communications, Social Media and PR	Administration	Yes							
N/A	4120	Board of Directors	Legislative Advocacy	Administration	Yes							
N/A	4200	Board of Directors	Candidate Statement Fees	Administration	Yes							
1	5005	Personnel	Emergency Preparedness	Human Resources	Yes	7/29/2024	8/20/2024	8/20/2024	9/17/2024	9/17/2024	9/17/2024	2024-014
2	5010	Operations	Emergency Response Guideline for Hostile or Violent Incidents	Human Resources	Yes	11/8/2022	11/15/2022	11/15/2022	12/14/2022	12/14/2022	12/14/2022	2022-043
4	5020	Personnel	Environmental Health and Safety	Human Resources	Yes	7/29/2024	8/20/2024	8/20/2024	9/17/2024	9/17/2024	9/17/2024	2024-014
5	5025	Personnel	Illness and Injury Prevention Program	Human Resources	Yes	9/10/2024	9/18/2024	9/18/2024	10/9/2024	10/9/2024	10/9/2024	2024-018
6	5030	Operations	Budget Preparation	Finance	Yes	11/8/2022	11/15/2022	11/15/2022	12/14/2022	12/14/2022	12/14/2022	2022-043
N/A	5031	Operations	User Fee Cost Recovery	Finance	Yes	11/15/2022	N/A	N/A	12/14/2022	12/14/2022	12/14/2022	2022-039
7	5035	Operations	Fixed-Asset Accounting Control	Finance	Yes		N/A	Direct to Full Board				
8	5040	Operations	Capital Assets	Finance	Yes	3/26/2025	5/1/2025	5/1/2025	5/14/2025	5/15/2025	5/15/2025	2025-014
9	5045	Operations	Investment of District Funds	Finance	Yes	11/15/2023	12/5/2024	12/11/2024	12/11/2024	12/11/2024	12/11/2024	2024-021
N/A	5046	Operations	Other Post-Employment Benefits	Finance	Yes	5/10/2022	N/A	8/1/2024	8/14/2024	8/14/2024	8/14/2024	2024-012
N/A	5047	Operations	Pension Funding	Finance	Yes	8/10/2023	8/1/2024	8/1/2024	8/14/2024	8/14/2024	8/14/2024	2024-012
N/A	5048	Operations	Issuance and Management of Long- Term Debt	Finance	No							
10	5050	Operations	Alternative Payment Plans	Finance	Yes	11/25/2024	12/5/2024	1/2/2025	1/8/2025	1/8/2025	1/8/2025	2025-001
11	5055	Operations	Employment of Consultants and	Finance	Yes							
12	5060	Operations	Employment of Outside Contractors	Finance	Yes							
13	5065	Engineering	Easement Abandonment	Engineering	Yes		N/A	Direct to Full Board				
14	5066	Engineering	Easement Acceptance	Engineering	No		N/A	Direct to Full Board				
15	5070	Engineering	Encroachment Permits	Engineering	Yes		N/A	Direct to Full Board				
16	5075	Operations	Credit Card Usage	Finance	Yes		8/1/2024					
17	5080	Operations	Purchasing	Finance	Yes		N/A	Direct to Full Board				
18	5085	Operations	Disposal of Surplus Property or	Finance	Yes	11/27/2024	12/5/2024	12/5/2024	1/8/2025	1/8/2025	1/8/2025	2025-001

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19	5090	Operations	Records Retention	Administration	Yes	4/28/2023	4/18/2023	5/16/2023	6/14/2023	6/14/2023	6/14/2023	2023-017
N/A	5095	Operations	District Residences and Facility	Human Resources	Yes	7/21/2020	6/21/2021	6/21/2021	Requested Edits	10/28/2021	10/28/2021	2021-019
N/A	5100	Operations	Press Relations and District Social	IT/Personnel	Yes	3/5/2025	3/18/2025	4/15/2025	5/14/2025	5/15/2025	5/15/2025	2025-014
3	6015	Miscellaneous	Public Complaints	Human Resources	Yes	N/A	N/A	N/A	1/8/2025	1/8/2025	1/8/2025	2025-001
4	5110	Miscellaneous	Claims Against the District	Finance	Yes	11/15/2023	11/7/2024	11/7/2024	1/8/2025	1/8/2025	1/8/2025	2025-001
6	5115	Engineering	District Standards for the Furnishing of	Engineering	Yes		N/A	Direct to Full Board				
7	5120	Miscellaneous	Environmental Review Guidelines	Engineering	Yes		N/A	Direct to Full Board				
8	5125	Miscellaneous	Annexation	Engineering	Yes		N/A	Direct to Full Board				
9	5130	Miscellaneous	Construction Requirements	Engineering	Yes		N/A	Direct to Full Board				
1	6005	Miscellaneous	Purpose of Board Policies	Combined with 1010	Yes		N/A	Direct to Board (Ad Hoc?)				
2	6010	Miscellaneous	Adoption, Amendment of Policies	Combined with 1010	Yes		N/A	Direct to Full Board				
5	6025	Miscellaneous	Public Documents and Public Records	Administration	Yes	4/28/2023	4/18/2023	5/16/2023	6/14/2023	6/14/2023	6/14/2023	2023-017
N/A	6020	Miscellaneous	Copying Public Documents	Administration	Yes		N/A	Direct to Full Board				
N/A	7001	Information Technology	Acceptable Use Policy	IT/Personnel	Yes	1/26/2025	3/11/2025	3/18/2025	3/27/2025	3/27/2025	3/27/2025	2025-009
N/A	8001	Information Technology	Access Control Policy	Information Technology	Yes			Board Closed Session				
N/A	8002	Information Technology	IT Hardware and Software Procurement	Information Technology	Yes			Board Closed Session				
N/A	8003	Information Technology	Workstations, Servers, and Network	Information Technology	Yes			Board Closed Session				
N/A	8004	Information Technology	Asset Management Policy	Information Technology	Yes			Board Closed Session				
N/A	8005	Information Technology	Backup and Disaster Recovery Policy	Information Technology	Yes			Board Closed Session				
N/A	7002	Information Technology	Bring Your Own Device (BYOD) Policy	IT/Personnel	Yes	1/26/2025	3/11/2025	3/18/2025	3/27/2025	3/27/2025	3/27/2025	2025-009
N/A	8006	Information Technology	Change Management Policy	Information Technology	Yes			Board Closed Session				
N/A	7003	Information Technology	Cloud Computing Policy	IT/Personnel	Yes	3/10/2025	4/15/2025	4/15/2025	5/14/2025	5/15/2025	5/15/2025	2025-014
N/A	8007	Information Technology	Third-Party Risk Assessment Policy	Information Technology	Yes			Board Closed Session				
N/A	8008	Information Technology	Configuration Management Policy	Information Technology	Yes			Board Closed Session				
N/A	8009	Information Technology	Cybersecurity Policy	Information Technology	Yes			Board Closed Session				
N/A	8010	Information Technology	Data Breach Notification Policy	Information Technology	Yes			Board Closed Session				
N/A	8011	Information Technology	Data Classification Policy	Information Technology	Yes			Board Closed Session				
N/A	7004	Information Technology	Email and Communication Policy	IT/Personnel	Yes	1/2/2025	1/21/2025	1/21/2025	2/27/2025	2/27/2025	2/27/2025	2025-007
N/A	8012	Information Technology	Encryption Policy	Information Technology	Yes			Board Closed Session				
N/A	8013	Information Technology	Incident Response Policy	Information Technology	Yes			Board Closed Session				
N/A	8014	Information Technology	Information Security Policy	Information Technology	Yes			Board Closed Session				
N/A	7005	Information Technology	Internet and Social Media Ethics Policy	IT/Personnel	Yes	1/26/2025	3/11/2025	4/15/2025	5/14/2025	5/15/2025	5/15/2025	2025-014
N/A	8015	Information Technology	Mobile Device Management Policy	Information Technology	Yes			Board Closed Session				
N/A	8016	Information Technology	Network Security Policy	Information Technology	Yes			Board Closed Session				
N/A	7006	Information Technology	Password Policy	IT/Personnel	Yes	1/2/2025	1/21/2025	1/21/2025	2/27/2025	2/27/2025	2/27/2025	2025-007
N/A	8017	Information Technology	Patch Management Policy	Information Technology	Yes			Board Closed Session				
N/A	8018	Information Technology	Physical Security Policy	Information Technology	Yes			Board Closed Session				
N/A	8019	Information Technology	Privacy Policy	Information Technology	Yes			Board Closed Session				
N/A	7007	Information Technology	Remote Access Policy	IT/Personnel	Yes	3/10/2025	5/20/2025	5/20/2025	6/11/2025			
N/A	8020	Information Technology	Risk Management Policy	Information Technology	Yes			Board Closed Session				
N/A	7008	Information Technology	Wireless Network Security Policy	IT/Personnel	Yes	3/10/2025	5/20/2025	5/20/2025	6/11/2025			
N/A	8021	Information Technology	Server Management Policy	Information Technology	Yes			Board Closed Session				
N/A	8022	Information Technology	Software Development Policy	Information Technology	Yes			Board Closed Session				
N/A	8023	Information Technology	Third-Party Vendor Management Policy	Information Technology	Yes			Board Closed Session				
N/A	7009	Information Technology	Drone Use Policy	IT/Personnel	Yes	5/15/2025	6/17/2025					
N/A	8024	Information Technology	IT Asset Disposal (ITAD) or Electronic	Information Technology	Yes			Board Closed Session				
N/A	7010	Information Technology	Electronic Signature Policy	IT/Personnel	Yes	5/15/2025	6/17/2025					
N/A	8025	Information Technology	Asset Protection and Fraud Policy	Information Technology	Yes			Board Closed Session				
N/A	7011	Information Technology	Cellular Telephone Usage Policy	IT/Personnel	Yes	1/2/2025	1/21/2025	1/21/2025	2/27/2025	2/27/2025	2/27/2025	2025-007
N/A	7012	Information Technology	Accessibility Policy	IT/Personnel	Yes	5/15/2025	6/17/2025					
N/A	8026	Information Technology	Electronic Communications and Data	Information Technology	Yes			Board Closed Session				
N/A	8027	Information Technology	Computer and Business Continuity	Information Technology	Yes			Board Closed Session				
N/A	7013	Information Technology	Personally Identifiable Information (PII)	IT/Personnel	Yes							
N/A	7014	Information Technology	Artificial Intelligence (AI) Policy	IT/Personnel	Yes							
N/A	8028	Information Technology	Security and Technology Access for	Information Technology	Yes			Board Closed Session				
N/A	7015	Information Technology	Security Awareness and Training Policy	IT/Personnel	Yes	N/A	1/21/2025					
N/A	8029	Information Technology	Data Ethics Policy	Information Technology	Yes			Board Closed Session				

Priority Legend:  
Yellow Highlight = Highest Priority  
Light Blue Highlight = Lowest Priority

Policy Approval Tracking  
BCVWD Policy Manual Project

Policy Number	New Policy Number	Section	Policy Name	HR's Recommendation Responsible Department	Drafted by BCVWD Staff	Approved by Legal Counsel	Presented to Committee	Provisionally Approved by Committee	Presented to Board of Directors	Approved by Board of Directors	Adoption Date	Resolution Number
N/A	7016	Information Technology	IoT (Internet of Things) Security Policy	IT/Personnel	Yes							
N/A	8030	Information Technology	Data Loss Prevention (DLP) Policy	Information Technology	Yes			Board Closed Session				
10	5135	Miscellaneous	District Responsibility for Soil	Engineering	No		N/A	Direct to Full Board				
N/A	7017	Information Technology	Non-IT Approved Software Purchasing	IT/Personnel	Yes							
N/A	8031	Information Technology	Electronica Data Retention and Records	Information Technology	Yes							
N/A	8032	Information Technology	Major IT Project Implementation	Information Technology	Yes							
			Color Code									
			Present to Committee									
			Present to Board									
			Removed									
			Slated for Committee									
			Tabled or Lost									
			Added to Matrix									





**Beaumont-Cherry Valley Water District  
Personnel Committee Meeting  
June 17, 2025**

**Item 8**

**STAFF REPORT**

**TO:** Personnel Committee

**FROM:** Ren Berioso, Human Resources Manager

**SUBJECT:** **Emergency Response Plan (ERP) – Joint Revision by Human Resources Division and Operations Department**

---

**Staff Recommendation**

Receive and file, or direct staff as desired.

**Executive Summary**

On October 21, 2024, the Human Resources (designated Risk Management) Division, in collaboration with the Operations Department, has undertaken a comprehensive review and revision of the District's Emergency Response Plan (ERP) for Water Systems. This joint effort reflects the collective commitment of both departments to ensure the safety, efficiency, and well-being of the District's workforce while enhancing the District's capacity to respond to emergencies that may impact water system operations.

The Emergency Response Plan had not undergone a comprehensive update since 2011. Recognizing the critical need to align the ERP with current regulatory requirements, industry best practices, and the District's evolving operational needs, staff from the Human Resources & Risk Management Division and the Operations Department embarked on this collaborative revision effort. The final revised document was completed on May 19, 2025.

**Discussion**

Recognizing the essential roles that both the Human Resources (designated Risk Management) Division and the Operations Department play in the District's emergency response efforts, staff from both departments engaged in a collaborative process to update the ERP. This partnership was critical to ensuring that all relevant operational, safety, and employee support considerations were fully addressed.

Key enhancements in the updated ERP include:

- Improved alignment with regulatory requirements and updated compliance frameworks.
- Reviewed and updated the State Regulatory Forms to ensure compliance with current requirements
- Enhanced clarity in responsibilities and roles of management and field staff during emergency events.
- Integration of HR functions such as injury tracking, after-incident investigation, and communication protocols into the ERP.
- Updated Emergency Operations Center (EOC) procedures and communication protocols to facilitate efficient response coordination.



- Inclusion of a preface that highlights the collaborative nature of this update, acknowledging the dedication of all staff involved.

To further reinforce preparedness, the Human Resources Manager (designated Risk Manager) and the Director of Operations will jointly conduct a monthly workshop beginning June 2025 with the Emergency Response Team. These workshops will focus on familiarizing the team with the ERP for Water Systems, ensuring all personnel are prepared to respond effectively during an emergency, and fostering resilience in the aftermath of an event. This proactive training initiative demonstrates the District's ongoing commitment to safety, responsiveness, and continuous improvement.

Through this collaborative revision and ongoing training, the District has produced an ERP that is comprehensive, adaptable, and tailored to the District's unique operational needs.

### **Fiscal Impact**

There is no immediate fiscal impact. Costs associated with training, implementation, and ongoing review of the ERP are expected to be absorbed within the annual operating budget.

### **Attachments:**

1. Emergency Response Plan (ERP) – Final Draft (May 19, 2025)

*Staff Report Prepared by Ren Berioso, Human Resources Manager*



## Attachment 1

Beaumont-Cherry Valley  
Water District



# Emergency Response Plan (ERP)

Water  
Systems



951-845-9581

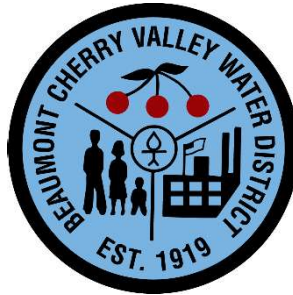


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**Pinkerton Consulting**

**Published December 8, 2004**

**Amended May 16, 2011**

**Amended May 19, 2025**

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# **I. INTRODUCTION**

## **A. PREFACE**

This document reflects the collective efforts of the Human Resources and Operations Departments at Beaumont-Cherry Valley Water District to enhance our Emergency Response Plan (ERP) for Water Systems. Recognizing the vital role that both Human Resources & Risk Management and Operations play in ensuring the safety, efficiency, and well-being of our workforce, we have partnered closely to develop a revised policy that meets our organizational goals and the needs of our employees.

The purpose of this revision is to align our operational practices with current regulatory requirements and industry best practices while supporting the District's commitment to a safe and productive workplace. Through this collaborative process, we have integrated perspectives from both departments, ensuring that our policies are not only compliant but also practical and adaptable to our unique environment.

We extend our gratitude to the dedicated staff members who contributed their time and expertise to this revision. We are committed to continuous improvement and encourage all employees to provide feedback to help us enhance and refine our practices further.

## **B. DEFINITION**

An Emergency Response Plan (ERP) is a structured framework of responding to event(s) or set of circumstances that goes beyond those normally found or associated with Beaumont-Cherry Valley Water District (BCVWD) in its normal day-to-day functioning of business of water delivery and services. The responses outlined in this document are designed to assist in taking action for those instances or circumstances that are NOT normally encountered or are NOT reasonably expected to occur in the normal course of business. Such circumstances or events may occur with little or no warning and may or may not involve criminal activity.

## **C. PURPOSE**

The purpose of this plan is to outline responsibilities, actions, precautions, policies and procedures for specific employees to provide a framework for maintaining operations and the on-going or resumption of service to the community.

## **D. GOAL**

The goal of Beaumont-Cherry Valley Water District (BCVWD) is not only to ensure an effective and efficient response to unforeseen operational disruptions but also to safeguard public health, protect District assets, ensure employee safety, and maintain clear communication with stakeholders. By doing so, the ERP aims to foster resilience, restore services promptly, and uphold public confidence in the District's ability to manage emergencies.

## **II. RESPONSE TEAM ORGANIZATION**

### **A. GENERAL ACTION TO BE TAKEN**

#### **1. Initial Assessment and Notification**

The notification matrix chart must be activated for the type of emergency situation occurring. Activation of the Emergency Operations Center (EOC) must occur immediately in order to direct and control operations. Communications through the Emergency Operations Center (EOC) are essential so as to provide the proper coordination of response efforts.

#### **2. Damage assessment**

An immediate assessment of damage is essential to ascertain the extent of the situation and what is the initiating factor (security or non-security related). Some immediate factors to consider for answers are:

- a. What and how much of the system is affected?
- b. Can it be isolated and how?
- c. Is this a security related event?
- d. What type of assistance do we need?

#### **3. Work assignments**

As soon as field reports are received, develop a course of action and make certain everyone understands their work assignment.

#### **4. Coordination with other agencies/contractors**

If assistance is required and authorized, activate the appropriate mutual aid assistance program or request the assistance of private contractors as per authorization.

#### **5. Public information**

The general public must be given prompt and factual information as appropriate:

- a. Nature of problem.
- b. Actions currently being taken and planned for immediate future.
- c. Estimated time of restoration of service.
- d. What type of action is required to inform the public?

### **B. EMERGENCY OPERATIONS CENTER**

The Primary Emergency Operations Center (EOC) is located in the Main Office at 560 Magnolia Ave, Beaumont, California. This office is equipped with (Unlisted lines) telephone lines, updated records, and drawings of all facilities. This site is readily accessible to all portions of distribution system. It is the primary nerve center for controlling our supply, wells, reservoirs, pumps and storage facilities and distribution system. However, in the event that the Primary EOC is compromised a Secondary EOC can be activated at either the Field Office at 815 12<sup>th</sup> Street, Beaumont, California or remotely via “Grab-and-Go” mobile communication equipment.

These locations are also ready to access our supply source, and our distribution system including wells, reservoirs, pumps and storage facilities within the distribution system. Activation of the EOC can occur by the Incident Commander after a report from anyone in the field or office who discovers a situation that warrants it.

### C. MANAGEMENT REPORTING STATIONS

Depending on the situation, an initial assessment could be performed by the responsible in charge of their respective area of the system prior to reporting to the EOC. IF THE SITUATION IS “NOT” A NATURAL DISASTER (including a forest fire), the EOC needs to be activated to “monitor” the initial assessment and maintain an on-going contact with the assessment team.

General Manager / Assistant General Manager  
 Director of Operations  
 Any Department Head  
 Division Managers / Supervisors  
 Senior Level Level Staff  
 Director of Operations

Emergency Operations Center (Magnolia)  
 Emergency Operations Center  
 Emergency Operations Center  
 Incident location  
 Incident location  
 Middle Well Field then/or Incident location

General Manager / Assistant General Manager  
 Director of Operations  
 Water Utility Superintendent  
 Water Utility Supervisor

Emergency Operations Center (12<sup>th</sup> and Palm)  
 Incident location then/or Emergency  
 Upper Well Field then/or EOC  
 Lower Well Field then/or Incident location

### D. EMERGENCY REPORTING STATIONS

Due to probability or the inability of many employees to reach assigned emergency stations promptly, available management and office personnel will be assigned as necessary. Following preliminary damage assessment, employees may be reassigned as priorities and employee work experience dictates.

Depending on the type of emergency and whether it is directed at one location or multiple locations determines the deployment of personnel.

1. Senior Water Utility Worker and Water Utility Worker II will need to go directly to the incident site to monitor or correct the problem.
2. Human Resources and Risk Management personnel or designee have been designated as couriers and will, therefore, provide the means of communication at the direction of the Incident Commander.
3. Production Employees will be assigned to pumping, storage or treatment facilities as needed to ensure operational capability is maintained.

4. Water Utility Superintendent will be assigned at the direction of the Incident Commander.
5. Engineering Personnel will report directly to the Emergency Operations Center.

## **E. DUTIES OF MANAGEMENT PERSONNEL**

1. **GENERAL MANAGER or ASSISTANT GENERAL MANAGER** will be designated as the INCIDENT COMMANDER. The General Manager or Assistant General Manager (if designated by the General Manager) shall also serve as liaison between City, County and Township officials and the State officials. Assessment of priorities will be designated by the General Manager or Assistant General Manager (if designated by the General Manager) to personnel concerned. Progress reports and assignments will be promptly forwarded to the General Manager to insure that he is fully informed at all times. News releases will be made by the General Manager or Assistant General Manager (if designated by the General Manager). All personnel are cautioned against making statements concerning Company operations unless they are fully informed and authorized, during or after emergencies. If the emergency is of local origin, the Incident Commander may contact other area water systems (see Notification Call List) to secure additional personnel, materials, or equipment as required. The Incident Commander may dispatch department personnel to wells, reservoirs, booster stations, distribution lines and storage tanks.

2. **DIRECTOR OF OPERATIONS** shall in the absence or incapacity of the General Manager or Assistant General Manager serve as INCIDENT COMMANDER and perform all duties related there-on-to. The Water Utility Superintendent shall fulfill duties requested by the Incident Commander. The individual will normally be stationed at the Emergency Operations Center and will serve as a special assistant to the Incident Commander. The Water Utility Superintendent shall revise distribution maps periodically and distribute the revisions to all distribution authorized personnel.

3. **WATER UTILITY SUPERINTENDENT** shall in the absence or incapacity of the General Manager, Assistant General Manager or the Director of Operations serve as INCIDENT COMMANDER and perform all duties related there-on-to. The Water Utility Superintendent shall assist the Assistant General Manager or the Director of Operations in implementing the plan of action to be taken. The individual will assume complete charge of field operations and report directly to the Assistant General Manager or Director of Operations. On the field side, the Water Utility Superintendent may dispatch department personnel to wells, reservoirs, booster stations, distribution lines and storage tanks.

4. **WATER UTILITY SUPERVISOR / WATER PRODUCTION SUPERVISOR** shall maintain an experience record of all employees to insure proper emergency assignments of personnel and shall report directly to the Director of Operations or Water Utility Superintendent. The Water Utility Supervisor or Water Production Supervisor shall dispatch department personnel to wells, reservoirs, booster stations, distribution lines and storage tanks.

5. **WATER UTILITY / PRODUCTION** personnel shall monitor the water quality and conduct bacteriological testing to determine quality and potability of water in affected areas of the

distribution and storage systems. These personnel shall be trained in determining the location of water, valves and pump stations from maps, which are located at various known storage areas, in order to effectively isolate problem areas in the distribution and collection grid.

6. **HUMAN RESOURCES AND RISK MANAGER OR DESIGNEE** shall maintain a written log of activities occurring and be available to perform courier or messenger relay duties if needed. Human The Human Resources and Risk Manager or designee shall also keep a record of the employees who were injured during the emergency situation, and will conduct after-incident investigation.

7. **DIRECTOR OF ENGINEERING OR DESIGNEE** shall report to the EOC and shall at all times maintain updated drawings of water system facilities and have them readily available to the Incident Commander.

8. **ACTING INCIDENT COMMANDER.** In the absence of a designated command hierarchy, any senior employee present may assume the role of Incident Commander until relieved by the General Manager or the Director of Operations.

**NOTE:** All employees shall maintain their contact information and address up-to-date with Human Resources and Risk Management Department. Human Resources and Management Department shall be responsible for contacting all personnel during an after hours emergency. Department Heads and/or supervisors can be a designee to contact his/her personnel if necessary during after-hours emergency. Department Heads and supervisors are required to keep an up-to-date staff directory (where they can be contacted while absent from the District's service area).

## **G. EMERGENCY FUNDS**

There is no set amount specifically budgeted for major emergency contingency expenditures. However, the General Manager is authorized to order immediate emergency expenditures to insure restoration of water service to the general public. In the absence of the General Manager, the acting Incident Commander may proceed with making the necessary expenditures.

## **H. IDENTIFICATION CARDS**

All employees must display Identification Card issued by the District at all times while on duty. This will assist with access to areas that are closed to the general public that District personnel may need to enter to check and/or repair facilities.

## **I. DISTRIBUTION SYSTEM MAPS AND VALVE LOCATION RECORDS**

Copies of distribution maps are located in the main office and operations building. Copies are provided Operations staff and are located in District vehicles. Current plans call for specific site maps to be located at all pumping and storage facilities.



### III. NOTIFICATION and ALERT PROCESS

#### A. NOTIFICATION

a. If discovery of the issue or event is made by a BCVWD employee while performing their regular duties, they shall immediately report by the fastest means possible this fact to the EOC. The report will include their name, type of occurrence, where they are and other appropriate needed information found in Table B.

Secondly, depending on the occurrence and possible life threatening conditions to themselves or any others make a mutual determination with the person at EOC as to their next course of action. SEE NOTIFICATION CALL LIST. Some examples of next course(s) of action could include:

- A. Dispatching a BCVWD employee to evaluate the situation further or make contact with individual(s) at the scene. If security issues are suspected or involved, special care must be exercised so as not to “disrupt” what may be a “crime scene”. Continue to monitor and check on individual and situation. This needs to occupy the full attention of the EOC during this time period.
- B. Directing BCVWD employee that is reporting to simply stay put and continue to monitor the situation.
- C. Notify Business Unit Manager of effected area.
- D. Notify the Managerial person in charge at BCVWD.
- E. Notify local law enforcement via 911 call.
- F. Activate the Emergency Action Plan (EAP) for related occurrence.
- G. Initiate notifications in accordance with EAP.

b. If discovery comes from a Non-BCVWD employee, it shall immediately be relayed by the fastest means possible to the EOC. The report will include the source of the notification (Name, organization, phone number) and type of occurrence and any other information stated.

Secondly, depending on the occurrence and possible life threatening conditions the person at EOC will make a determination as to the next course of action to be taken. SEE NOTIFICATION CALL LIST. Some examples of next course(s) of action could include:

- A. Dispatching a BCVWD employee to evaluate the situation further or make contact with individual(s) at the scene. If security issues are suspected or involved, special care must be exercised so as not to “disrupt” what may be a “crime scene”.
- B. Continue to monitor and check on individual and situation. This needs to occupy the full attention of the “EOC” during this time period.
- C. Notify Business Unit Manager of effected area.
- D. Notifying the Managerial person in charge at BCVWD.
- E. Notify local law enforcement via a 911 call.
- F. Activate the Emergency Action Plan for related occurrence.
- G. Initiate notifications in accordance with EAP.

c. Activation of the Emergency Action Plan (EAP) for the various issues or occurrences needs to happen

in a timely and efficient manner. The protocol to physically make this happen needs to take advantage of modern communications and electronics as this can be an extremely involved and timely task.

d. A point to be aware of and remember is that the “news media” monitor radio frequencies utilized by the law enforcement community and may arrive at the scene before any EAP is up and running. Therefore, preparations for “Public Disclosure and BCVWD Action Plan” need to be ready with the General Manager or a member of the Board of Directors shall serve as a spokesperson almost simultaneous with any public notification.

NOTE: This is where prior planning, and preparation will assist in making this “Beaumont Cherry Valley Water District Emergency” one that can be managed with the care and sensitivity it needs. **The General Manager or a member of the Board of Directors** will speak for BCVWD and to whom the “news Media” will be directed.

## **B. COMMUNICATIONS FAILURE**

If a natural or man-made disaster immediately disrupts all forms of automatic communications, management and employees should report to their "assigned emergency station" as quickly as possible. If their primary assigned station is inaccessible, employees should immediately report in-person to the Command Post/EOC.

## **IV. GENERAL SECURITY POLICY PROTOCOLS**

### **A. STATUS**

The response to a security event requires “due care”. In addition to the threat, damage or possible damage present, the event may be considered a criminal act and the area, a crime scene. As such, the physical area surrounding the entry point or breach of the system is normally considered or may be designated a “crime scene”. The crime scene needs to be protected in its original state as to when the crime occurred until it can be processed for evidence leading to the perpetrators and/ or methods utilized in the act. Care must be taken not to disturb what occurred yet action may be taken to avert any immediate threat to life or significant damage to the water system. This area may become restricted to “law enforcement personnel only” once they arrive. This action may preclude water personnel from entering unless they are specifically authorized to by the law enforcement agency.

## B. EPA ALERT LEVELS

CONDITION	CONSIDER ADOPTING THESE MEASURES	
<p><b>LOW (GREEN)</b> Low Risk of Terrorist Attack</p> <p>signifies a low risk of terrorist attacks. Protective measures should focus on ongoing facility assessments; and the development, testing, and implementation of emergency plans. In addition to THREAT LEVEL GREEN, there are four higher threat levels: blue, yellow, orange, and red. (Please refer to the other fact sheets for information on suggested steps to be taken during other threat condition levels.)</p>	Detection	<ul style="list-style-type: none"> <li>▪ Monitor water quality at the source water, leaving the plant, and in distribution and storage systems. Establish baseline results. Review operational and analytical data to detect unusual variations.</li> <li>▪ Follow-up on customer complaints concerning water quality and/or suspicious behavior on the facilities.</li> <li>▪ Confirm communication protocol with public health officials concerning potential waterborne illnesses.</li> </ul>
	Preparedness	<ul style="list-style-type: none"> <li>▪ Post emergency evacuation plans in accessible, but secure, location near entrance for immediate access by law enforcement, fire response, and other first responders.</li> <li>▪ Inventory spare parts and on-hand chemicals. Check if sufficient.</li> <li>▪ Identify sensitive populations within the service area (e.g., hospitals, nursing homes, daycare centers, schools, etc.) for notification, as appropriate, in the event of a specific threat against the utility.</li> <li>▪ Back-up critical files such as plans and drawings, as-builts, sampling results, billing, and other critical information.</li> <li>▪ Conduct appropriate background investigations of staff, contractors, operators, and others with access to the facility.</li> <li>▪ Prepare vulnerability assessments and revise to incorporate changes made (e.g., assets added/replaced or new countermeasures implemented).</li> <li>▪ Ensure that employees understand appropriate emergency notification procedures.</li> </ul>
	Prevention	<ul style="list-style-type: none"> <li>▪ Train staff in safety procedures, such as handling hazardous materials and maintaining and using self-contained breathing apparatus.</li> <li>▪ Secure equipment such as vehicles and spare parts.</li> <li>▪ Monitor requests for potentially sensitive information.</li> </ul>
	Protection	<ul style="list-style-type: none"> <li>▪ Check all chemical deliveries for driver identification and verification of load.</li> <li>▪ Maintain vigilance and be alert to suspicious activity. Inspect buildings in regular use for suspicious packages and evidence of unauthorized entry. Report any suspicious activity to appropriate authorities.</li> <li>▪ Prosecute intruders, trespassers, and those detained for tampering to the fullest extent possible under applicable laws.</li> <li>▪ Review request for tours and identify protocols for managing the tour.</li> <li>▪ Implement controls for construction activities at critical sites.</li> <li>▪ Maintain disinfectant residuals as required by regulations.</li> <li>▪ Implement best management practices for optimizing drinking water treatment.</li> </ul>

CONDITION	CONSIDER ADOPTING THESE MEASURES (and those at lower threat levels)	
<b>GUARDED (BLUE)</b> General Risk of Terrorist Attacks  signifies a <b>guarded risk</b> of terrorist attacks. Protective measures should focus on activating employee and public information plans; exercising communication channels with response teams and local agencies; and reviewing and exercising emergency plans.	Detection	<ul style="list-style-type: none"> <li>▪ Test security alarms and systems for reliability.</li> </ul>
	Preparedness	<ul style="list-style-type: none"> <li>▪ Reaffirm communication and coordination protocols (embedded in the utility's emergency response plan) with local authorities such as police and fire departments, HAZMAT teams, hospitals, and other first responders.</li> <li>▪ Prepare and/or revise emergency response plans associated communication protocols. Include appropriate local officials concerned with law enforcement, emergency response and public health.</li> <li>▪ On a regular basis post employee reminders about events that constitute security violations and ensure employees understand notification protocol in the event of a security breach.</li> <li>▪ Prepare draft press releases, public notices and other communications for a variety of incidents. Route through appropriate channels of review to ensure pieces are clear and consistent.</li> </ul>
	Prevention	<ul style="list-style-type: none"> <li>▪ Secure buildings, rooms, and storage areas not in regular use. Maintain a list of secured areas or facilities and monitor activity in these areas.</li> </ul>
	Protection	<ul style="list-style-type: none"> <li>▪ Control access to mission critical facilities.</li> </ul>



CONDITION	CONSIDER ADOPTING THESE MEASURES (and those at lower threat levels)	
<p><b>ELEVATED (YELLOW)</b></p> <p><i>Significant Risk of Terrorist Attack</i></p> <p>signifies an elevated risk of terrorist attacks. Protective measures should focus on increasing surveillance of critical facilities; coordinating response plans with allied utilities and response teams and local agencies; and implementing emergency plans, as appropriate.</p>	Detection	<ul style="list-style-type: none"> <li>▪ To the extent possible, increase the frequency and extent of monitoring activities and review results against baseline.</li> <li>▪ Increase review of operational and analytical data (including customer complaints) with an eye toward detecting unusual variability (as an indicator of unexpected changes in the product). Variations due to natural or routine operational variability should be considered first.</li> <li>▪ Increase surveillance activities in source and finished water areas.</li> </ul>
	Preparedness	<ul style="list-style-type: none"> <li>▪ Review and update emergency response procedures and communication protocols.</li> <li>▪ Establish unannounced security spot checks (e.g., verification of personal identification and door security) at access control points for critical facilities.</li> <li>▪ Increase frequency for posting employee reminders of the threat situation and about events that constitute security violations.</li> <li>▪ Ensure employees understand notification protocol in the event of a security breach.</li> <li>▪ Conduct security audit of physical security assets, such as fencing and lights, and repair or replace missing/broken assets. Remove debris from along fence-lines that could be stacked to facilitate scaling.</li> <li>▪ Maximize physical control of all equipment and vehicles inoperable when not in-use, (e.g., lock steering wheels, secure keys, chain and padlock on front-end loaders, etc.).</li> <li>▪ Review draft communications on potential incidents, brief media relations personnel of potential for press contact and/or issuance of release.</li> <li>▪ Review and update list of sensitive populations within the service area, such as hospitals, nursing homes, daycare centers, schools, etc., for notification, as appropriate, in the event of a specific threat against the utility.</li> <li>▪ Contact neighboring water utilities to review coordinated response plans and mutual aid during emergencies.</li> <li>▪ Review whether critical replacement parts are available and accessible.</li> </ul>
	Prevention	<ul style="list-style-type: none"> <li>▪ Carefully review all facility tour requests before approving. If allowed, implement security measures to include list of names prior to tour, request identification of each attendee prior to tour, prohibit backpacks/duffle bags, cameras and identify parking restrictions.</li> <li>▪ On a daily basis, inspect the interior and exterior of buildings in regular use for suspicious activity or packages, signs of tampering, or indications of unauthorized entry.</li> <li>▪ Implement mailroom security procedures. Follow guidance provided by the United States Postal Service.</li> </ul>
	Protection	<ul style="list-style-type: none"> <li>▪ Verify the identity of all personnel entering the water utility. Mandate visible use of identification badges. Randomly check identification badges and cards of those on the premises.</li> <li>▪ At the discretion of the facility manager or security director, remove all vehicles and objects (e.g., trash containers) located near mission critical facility security perimeters and other sensitive areas.</li> <li>▪ Verify the security of critical information systems (e.g., Supervisory Control and Data Acquisition (SCADA), Internet, email, etc.) and review safe computer and internet access procedures with employees to prevent cyber intrusion.</li> <li>▪ Consider steps needed to control access to all areas under the jurisdiction of the water utility.</li> </ul>

CONDITION	CONSIDER ADOPTING THESE MEASURES (and those at lower threat levels)	
<p><b>HIGH (ORANGE)</b> High Risk of Terrorist Attack</p> <p>Signifies a high risk of terrorist attack. Protective measures should focus on limiting facility access to staff and contractors, and security efforts with local law enforcement and the armed forces, as appropriate.</p>	Detection	<ul style="list-style-type: none"> <li>▪ Increase the frequency and extent of monitoring activities. Review results against baseline.</li> <li>▪ Confirm that county and state health officials are on high alert and will inform water utilities of any potential waterborne illnesses.</li> <li>▪ If a neighborhood watch-type program is in place, notify the community and request increased awareness.</li> </ul>
	Preparedness	<ul style="list-style-type: none"> <li>▪ Confirm emergency response and laboratory analytical support network are ready for deployment 24 hours per day, 7 days a week.</li> <li>▪ Reaffirm liaison with local police, intelligence, and security agencies to determine likelihood of an attack on the water utility personnel and facility and consider appropriate protective measures (e.g., road closing, extra surveillance, etc.).</li> <li>▪ Practice communications protocol with local authorities and others cited in the facility's emergency response plan.</li> <li>▪ Post frequent reminders for staff and contractors of the threat level, along with a reminder of what events constitute security violations.</li> <li>▪ Ensure employees are fully aware of emergency response communication protocols and have access to contact information for relevant law enforcement, public health, environmental protection, and emergency response organizations.</li> <li>▪ Inspect and practice activation of available emergency interconnections with neighboring water agencies.</li> <li>▪ Have alternative water supply plan ready to implement (e.g., bottled water delivery).</li> </ul>
	Prevention	<ul style="list-style-type: none"> <li>▪ Discontinue tours and prohibit public access to all operational facilities.</li> <li>▪ Consider requesting increased law enforcement surveillance, particularly of critical assets and otherwise unprotected areas.</li> </ul>
	Protection	<ul style="list-style-type: none"> <li>▪ Evaluate need to staff water treatment/production facility at all times.</li> <li>▪ Consider the need to prohibit recreational use of surface water reservoirs.</li> <li>▪ Increase security patrol activity to the maximum level sustainable and ensure tight security in the vicinity of mission critical facilities. Vary the timing of security patrols.</li> <li>▪ Request employees change password on critical information management systems.</li> </ul>

CONDITION	CONSIDER ADOPTING THESE MEASURES (and those at lower threat levels)	
<p><b>SEVERE (RED) Severe Risk of Terrorist Attack</b></p> <p>signifies a severe risk of terrorist attacks. Protective measures should focus on the decision to close specific facilities and the redirection of staff resources to critical operations.</p>	Detection	<ul style="list-style-type: none"> <li>▪ Ensure that list of sensitive populations (e.g., hospitals, nursing homes, daycare centers, schools, etc.) within the service area is accurate and shared with appropriate public health officials.</li> <li>▪ Reconfirm that county and state health officials are on high alert and will inform water utilities of any potential waterborne illnesses.</li> </ul>
	Preparedness	<ul style="list-style-type: none"> <li>▪ Post daily notices to staff regarding threat level and appropriate security practices</li> <li>▪ Where appropriate, place back-up operational capacity on-line (water treatment plant filters, turbines, etc.).</li> <li>▪ Ensure key utility personnel are on duty.</li> <li>▪ Where appropriate, provide public notification for citizens to store emergency water supply or to implement other preparatory measures.</li> <li>▪ Evaluate the need for opening an emergency operations center.</li> </ul>
	Prevention	<ul style="list-style-type: none"> <li>▪ As appropriate, request increased law enforcement and/or security agency surveillance, particularly of critical assets and otherwise unprotected areas (e.g., consider if National Guard assistance is needed and make appropriate request).</li> <li>▪ Limit access to facilities and activities to essential personnel.</li> <li>▪ Consider whether mail and packages should go to a central, secure location and be inspected before distribution. Remind mailroom personnel of the need for heightened awareness when sorting and distributing all incoming mail.</li> </ul>
	Protection	<ul style="list-style-type: none"> <li>▪ Ensure existing security policies, procedures, and equipment are effectively implemented.</li> <li>▪ Recheck security of all on-site chemical storage and utilization areas.</li> <li>▪ Implement frequent and staggered inspections of the exterior of buildings (to include roof areas) and parking areas.</li> <li>▪ Re-check the security of critical information systems (e.g., SCADA, Internet, email, etc.) and have staff change computer passwords.</li> <li>▪ Consider placing staff at remote (typically unmanned) facilities.</li> </ul>



## **V. TYPES of EMERGENCIES (Non-security & Security Related)**

### **A. MEDICAL EMERGENCIES (Non-security related)**

#### **1. GENERAL**

Medical emergencies can occur at any time. The medical emergency may be for one person or groups of individuals and may directly or indirectly affect the water system property or the water system (at any point within the system). Most medical emergencies can be handled with first aid procedures but others depending on the seriousness may require immediate attention by medically trained professionals.

**Time and proper response is of an essence in addressing emergency medical situations.**

The stockpiling of emergency first aid kits and supplies) should be considered at all locations or nearby sites. Automatic External Defibrillators (AED) should be considered at all main locations. All individuals should be trained in First Aid, CPR and the use of AED.

Upon becoming aware that any part of the BCVWD Water System has been affected by this type of medical situation, this emergency response plan will be immediately implemented.

The emergency response plan for this type of situation will include specific initial notifications, response actions, recovery actions, recovery actions, appropriate utility elements and remediation actions.

#### **2. INITIAL NOTIFICATION**

- a. Evaluate and apply basic first aid as appropriate
- b. If emergency is beyond first aid treatment, call for assistance by notifying BCVWD Supervisor, Human Resources and Risk Management OR calling 911 immediately depending on the emergency.
- c. Activate BCVWD Response Personnel to their respective assignments.
- d. Activate BCVWD notification plan for this particular event (see Notification Matrix).

#### **3. RESPONSE ACTIONS**

- a. Injury to an individual - Conduct an immediate review of the medical emergency situation. If it appears that it is a minor emergency that can be attended to by you with very basic first aid, do so. If it appears beyond your capability call for assistance, notify your supervisor and/OR call 911.

- b. If there are multiple injuries IMMEDIATELY call for assistance, notify your supervisor, Human Resources and Risk Management and/OR call 911. Apply basic first aid and keep individuals safe from additional hazards while waiting for emergency ambulatory services.
- c. Take action to alert others to dangers that may be present and to stay and assist or stay clear.
- d. Based on activities individual(s) was performing, evaluate impact on current water system operations.
- e. Coordinate activities to maintain water system stability as needed.

#### 4. RECOVERY ACTIONS

BCVWD personnel should begin recovery actions as soon as practical after the medical emergency. If necessary, a damage assessment of the processes, facility or activity should occur. Actions found necessary to perform need to be identified and communicated.

#### 5. RECOVERY NOTIFICATIONS

Activate notification plan for this particular event which may require outside resources.

#### 6. APPROPRIATE UTILITY ELEMENTS

- a. Dependent on the feedback from damage assessment teams.
- b. Implement damage recovery plan including prioritized processes as determined by management.

#### 7. REMEDIATION ACTIONS

- a. Repair damage.
- b. Assess need for additional procedural, equipment/facility and/or training for future occurrences.

## **B. VEHICLE ACCIDENTS (Non-security related)**

### **GENERAL**

Vehicle accidents can occur at any time. A vehicle accident may involve a single vehicle or multiple vehicles. In addition to the physical damage caused by the vehicle(s) other issues may be involved which can include medical situations and/or fire. Vehicle(s) damaged may be specialized equipment utilized in the maintenance of the water system and may directly or indirectly affect the water system property or the water system (at any point within the system).

Time and proper response is of an essence in addressing this emergency.

Upon becoming aware that any part of the Water System has been affected by this type of accidents, this emergency response plan will be immediately implemented.

The emergency response plan for this type of situation will include specific initial notifications, response actions, recovery actions, recovery notifications, appropriate utility elements and remediation actions.

### **2. INITIAL NOTIFICATION**

- a. Evaluate and apply basic first aid as appropriate
- b. If the emergency is beyond first aid treatment, call for assistance by notifying BCVWD Supervisor, Human Resources and Risk Management OR calling 911 immediately depending on the emergency.
- c. Activate BCVWD Response Personnel to their respective assignments.
- d. Activate BCVWD notification plan for this particular event (see Notification Matrix).

### **3. RESPONSE ACTIONS**

- a. Conduct an immediate review of the situation to see if a medical emergency situation exists. If it appears that it is a minor emergency that can be attended to by you with very basic first aid, do so. If it appears beyond your capability call for assistance, notify your supervisor and/OR call 911.
- b. If there are multiple injuries IMMEDIATELY call for assistance, notify your supervisor, Human Resources and Risk Management and/OR call 911. Apply basic first aid and keep individuals safe from additional hazards while waiting for emergency ambulatory services.
- c. Take action to alert others to dangers that may be present and to stay an assist or stay clear.

- d. Photograph and document the accident. Have the driver and any occupants make a statement as to what occurred. If the accident occurred off the BCVWD property, call the local police to take an accident report.
- e. Based on activity or damage done by the vehicle(s); evaluate impact on current water system operations.
- f. Coordinate activities to maintain water system stability as needed.

#### 4. RECOVERY ACTIONS

BCVWD personnel should begin recovery actions as soon as practical after the medical emergency. If necessary, a damage assessment of the processes, facility or activity should occur. Actions found necessary to perform need to be identified and communicated.

#### 5. RECOVERY NOTIFICATIONS

Activate notification plan for this particular event which may require outside resources.

#### 6. APPROPRIATE UTILITY ELEMENTS

- a. Dependent on the feedback from damage assessment teams.
- b. Implement damage recovery plan including prioritized processes as determined by management.

#### 7. REMEDIATION ACTIONS

- a. Repair damage.
- b. Assess need for additional procedural, equipment/facility and/or training for future occurrences.

## **C. FLOODS (Non-security related)**

### **1. GENERAL**

Flood events are normally based on the weather conditions that create over-abundance of water for the land or storm system to handle may be affecting the water system property or the water system (at any point within the system). Not all of this area is prone to this type of weather; however, flooding of low lands can result in severe injury or damage to individuals, property, structures and delivery systems.

The stockpiling of sand and sand bags, portable pumps, power chain saws and portable power generators should be considered at critical locations or nearby sites.

Upon becoming aware that any part of the Water System has been affected by this type of weather conditions, this emergency response plan will be immediately implemented.

The emergency response plan for this type of situation will include specific initial notifications, response actions, recovery actions, recovery notifications, appropriate utility elements and remediation actions.

### **2. INITIAL NOTIFICATION**

- a. Notify BCVWD Supervisor. Supervisor should communicate the matter to Human Resources and Risk Management and/or Department Head whenever possible.
- b. Activate BCVWD Response Personnel to their respective assignments.
- c. Activate BCVWD notification plan for this particular event (see Notification Matrix).

### **3. RESPONSE ACTIONS**

- a. Injury to people - Due care must be taken while responding to provide all possible efforts in giving assistance and emergency first aid to the injured and notifying emergency ambulatory services.
- b. Damage to property - Due care must be taken while responding in these type of weather conditions to avoid becoming a victim of injury or to be struck by falling wires, trees, weaken or unstable structures. Implementation of standard repair processes and operations will commence after the appropriate assessment has been completed by response personnel.
- c. Attention must be to electrical circuits and protection against electrocution during flooding conditions.
- d. Based on extent or type of damage, consider alternate (interim) processes in order to maintain at least some level of continued service if applicable.

- e. Coordinate alternative water supply, as needed.
- f. Consider activating public notice notification.

#### 4. RECOVERY ACTIONS

BCVWD personnel should begin recovery actions as soon as practical after the damage assessment and/or processes, facility or activity has been isolated from the rest of the utility facilities or determined that this threat is no longer present.

#### 5. RECOVERY NOTIFICATIONS

Activate notification plan for this particular event which may require outside resources.

#### 6. APPROPRIATE UTILITY ELEMENTS

- a. Dependent on the feedback from damage assessment teams.
- b. Implement damage recovery plan including prioritized processes as determined by management.

#### 7. REMEDIATION ACTIONS

- a. Repair damage.
- b. Assess need for additional procedural, equipment/facility and/or training for future occurrences.

## **D. SNOW/ICE DAMAGE (Non-security related)**

### **1. GENERAL**

These events are based on the weather conditions that result in snow and/or ice conditions affecting the water system property or the water system (at any point within the system). Since this area is not normally prone to this type of weather, the occurrence of such conditions can result in severe injury or damage to individuals, property, structures and delivery systems.

The stockpiling of salt to be used to reduce the freezing effect of ice and snow, power chain saws and power generators should be considered at critical locations or nearby sites.

Upon becoming aware that any part of the Water System has been affected by this type of weather conditions, this emergency response plan will be immediately implemented.

The emergency response plan for this type of situation will include specific initial notifications, response actions, recovery actions, recovery notifications, appropriate utility elements and remediation actions.

### **2. INITIAL NOTIFICATION**

- a. Notify BCVWD Supervisor. Supervisor should communicate the matter to Human Resources and Risk Management and/or Department Head whenever possible.
- b. Activate BCVWD Response Personnel to their respective assignments.
- c. Activate BCVWD notification plan for this particular event (see Notification Matrix).

### **3. RESPONSE ACTIONS**

- a. Injury to people - Due care must be taken while responding to provide all possible efforts in providing assistance and emergency first aid to the injured and notifying emergency ambulatory services.
- b. Damage to property - Due care must be taken while responding in these type of weather conditions to avoid becoming a victim of injury or to be struck by falling wires, trees, weaken or unstable structures. Inspect Priority One, Two and Three sites and Routes (SEE APPENDIX A). Implementation of standard repair processes and operations will commence after the appropriate assessment has been completed by response personnel.
- c. Based on extent or type of damage, consider alternate (interim) processes in order to maintain at least some level of continued service if applicable.
- d. Coordinate alternative water supply, as needed.
- e. Consider activating public notice notification.

#### 4. RECOVERY ACTIONS

BCVWD personnel should begin recovery actions as soon as practical after the damaged assessment and/or processes, facility or activity has been isolated from the rest of the utility facilities or determined that this threat is no longer present.

#### 5. RECOVERY NOTIFICATIONS

Activate notification plan for this particular event which may require outside resources.

#### 6. APPROPRIATE UTILITY ELEMENTS

- a. Dependent on the feedback from damage assessment teams.
- b. Implement damage recovery plan including prioritized processes as determined by management.

#### 7. REMEDIATION ACTIONS

- a. Repair damage.
- b. Assess need for additional procedural, equipment/facility and/or training for future occurrences.



## **E. EARTHQUAKES (Non-security related)**

### **1. GENERAL**

This event is based on geographical and seismic conditions that occur everyday throughout the world that can have varying effects on the water system property or the water system (at any point within the system). The effects can range from no noticeable implications to catastrophic destruction. Due to the actions involved in earthquakes and the shifting of the ground mass, damage to the infrastructure of the delivery system and Dam sites, earthen or structural, can readily occur. Earthquakes come with a series of “aftershocks” following the main event that can continue to causes damage. The secondary effects of earthquakes are fires caused by broken gas mains and the resulting fire spread due to broken and disrupted water supply normally used for extinguishing them. All of these affects from an earthquake require immediate coordination of all portions of the water delivery system.

The stockpiling of piping and valves, contractual heavy equipment, portable pumps, power chain saws and potable power generators should be considered at critical locations or nearby sites.

Upon becoming aware that any part of the service area for the Water System being affected by an earthquake, this emergency response plan will be immediately implemented.

The emergency response plan for this type of situation will include specific initial notifications, response actions, recovery actions, recovery notifications, appropriate utility elements and remediation actions.

### **2. INITIAL NOTIFICATION**

- a. Notify BCVWD Supervisor. Supervisor should communicate the matter to Human Resources and Risk Management and/or Department Head whenever possible.
- b. Activate BCVWD Response Personnel to their respective assignments.
- c. Activate BCVWD notification plan for this particular event (see Notification Matrix).

### **3. RESPONSE ACTIONS**

- a. Injury to people - Due care must be taken while responding to provide all possible efforts in giving assistance and emergency first aid to the injured and notifying emergency ambulatory services.
- b. The potential damage due to flooding from reservoirsmust be immediately evaluated and monitored.
- c. Depending on size of earthquake, see APPENDIX A for mobilization response.

- d. Inspect Priority One, Two and Three sites and Routes (SEE APPENDIX B).
- e. Damage to property - Due care must be taken while responding in an earthquake situation due the “aftershocks” and damage they may cause. The need to avoid becoming a victim of injury or being struck by falling wires, trees, weaken or unstable structures should be foremost in everyone’s thought process. Consideration to aid firefighting will need to be coordinated with Local Emergency Response Offices. Implementation of standard repair processes and operations will commence after the appropriate assessment has been completed by response personnel.
- f. Based on extent or type of damage, consider alternate (interim) processes in order to maintain at least some level of continued service if applicable.
- g. Coordinate alternative water supply, as needed.
- h. Activating public notice notification.

#### 4. RECOVERY ACTIONS

BCVWD personnel should begin recovery actions as soon as practical after the damaged assessment and/or the process, facility or activity has been isolated from the rest of the utility facilities or it has been determined that this threat is no longer present.

All efforts should be made to keep the public and news media informed of the steps that are being taken and the public is informed of things they could do to assist in the process.

#### 5. RECOVERY NOTIFICATIONS

Activate notification plan for this particular event which may require outside resources.

#### 6. APPROPRIATE UTILITY ELEMENTS

- a. Dependent on the feedback from damage assessment teams.
- b. Implement damage recovery plan including prioritized processes as determined by management.

#### 7. REMEDIATION ACTIONS

- a. Repair damage.

Assess need for additional procedural, equipment/facility and/or training for future occurrences.

## **F. FIRE (Treat all fires as Security related until proven otherwise)**

### **NOTICE:**

“The response to a security event requires due care. In addition to the damage or possible damage present, the event may be considered a criminal act and the area a crime scene. As such, the physical area surrounding the entry point or breach of the system is normally considered a “crime scene”. The crime scene needs to be protected in its original state as to when the crime occurred until it can be processed for evidence leading to the perpetrators and/ or methods utilized in the act. Care must be taken not to disturb what occurred yet action may be taken to avert any immediate threat to life or significant damage to the water system. This area will become restricted to “law enforcement personnel only” once they arrive. This action may preclude BCVWD personnel from entering unless they are specifically authorized to by the police.”

### **1. GENERAL**

A fire event is based on the accidental or negligent situations, act of God, or intentional activity. Each one usually results in property damage and/or injury including death to individuals. The secondary affect is diminished or no service to the consumer by the delivery of product - water. The first goal is to save life and then property and maintain service. Immediate response to extinguish or contain the fire is paramount. The cause of the fire is very important to determine as it may affect the future use of certain equipment, insurance coverage, and civil and/or criminal action. Good housekeeping, regular preventative maintenance, proper storage of combustibles, portable extinguishers and sprinkler equipped building reduce the potential for fires.

Fires can be small (those who’s extinguishment can be accomplished by use of a hand held extinguisher) and large fires (any fire that cannot be contained with a hand held fire extinguisher).

#### **THE FIRST STEP IN ANY FIRE IS TO SOUND THE ALERT AND GET ASSISTANCE!**

All individuals should be trained in the proper use of hand held fire extinguishers.

Upon becoming aware that any part of the Water System is or has been affected by a LARGE fire event, this emergency response plan will be immediately implemented.

The emergency response plan for this type of situation will include specific initial notifications, response actions, recovery actions, recovery notifications, appropriate utility elements and remediation actions.

## 2. INITIAL NOTIFICATION

- a. Notify BCVWD Director of Operations and/or Supervisor. Supervisor should communicate the matter to Human Resources and Risk Management and/or Department Head whenever possible.
- b. Activate BCVWD Response Personnel to their respective assignments.
- c. Activate BCVWD notification plan for this particular event (see Notification Matrix).

## 3. RESPONSE ACTIONS

- a. THE FIRST RESPONSE TO ANY FIRE IS TO SOUND THE ALERT AND GET ASSISTANCE.
- b. IF after sounding the alarm and getting assistance, you are knowledgeable in the use of the fire extinguisher AND the fire is small, you may extinguish it with the hand held extinguisher OR assist in evacuating the area and wait for the fire department to arrive.
- c. Injury to people - Due care must be taken while responding to provide all possible efforts in giving assistance and emergency first aid to the injured and notifying emergency ambulatory services.
- d. Damage to property - Due care must be taken while responding as fire can destroy the structural integrity of structures and the collapse may occur. You must avoid becoming a victim of injury or being struck by falling wires, trees, weaken or unstable structures. Implementation of standard repair processes and operations will commence after the appropriate assessment has been completed by response personnel.
- e. Based on extent or type of damage, consider alternate (interim) processes in order to maintain at least some level of continued service if applicable.
- f. Coordinate alternative water supply, as needed.
- g. Consider activating public notice notification.

## 4. RECOVERY ACTIONS

BCVWD personnel should begin recovery actions as soon as practical after the damaged assessment and/or processes, facility or activity has been isolated from the rest of the utility facilities or determined that this threat is no longer present.

## 5. RECOVERY NOTIFICATIONS

Activate notification plan for this particular event which may require outside resources.

## 6. APPROPRIATE UTILITY ELEMENTS

- a. Dependent on the feedback from damage assessment teams.
- b. Implement damage recovery plan including prioritized processes as determined by management.

## 7. REMEDIATION ACTIONS

- a. Repair damage.
- b. Assess need for additional procedural, equipment/facility and/or training for future occurrences.

## **G. TRESPASS, VANDALS and SABOTAGE (Security related)**

### **Man-Made and/or Technological Emergencies**

#### **NOTICE:**

“The response to a security event requires due care. In addition to the damage or possible damage present, the event may be considered a criminal act and the area a crime scene. As such, the physical area surrounding the entry point or breach of the system is normally considered a “crime scene”. The crime scene needs to be protected in its original state as to when the crime occurred until it can be processed for evidence leading to the perpetrators and/ or methods utilized in the act. Care must be taken not to disturb what occurred yet action may be taken to avert any immediate threat to life or significant damage to the water system. This area will become restricted to “law enforcement personnel only” once they arrive. This action may preclude BCVWD personnel from entering unless they are specifically authorized to by the police.”

#### **1. GENERAL**

These events are based on the threat of or actual, intentional trespass, vandalism and/or sabotage of water system property or the water system (at any point within the system).

Under Presidential Decision Directive (PDD) 63 issued on May 22, 1998, the United States Environmental Protection Agency (USEPA) was designated as the lead federal agency to assess and address the vulnerabilities of the Nation's water supply infrastructure. Following the terrorist attacks of September 11, 2001, the President signed the Public Health Security and Bio-Terrorism Preparedness and Response Act of 2002 into law (PL 107-188) (June 12, 2002). Per this Act, community water systems had to conduct vulnerability assessments (V/As) within mandated deadlines and prepare emergency response plans (ERPs).

To aid this effort, USEPA directed efforts to reduce the vulnerability of water systems to terrorist attacks, to enhance their security and ability to respond to emergency situations.

Upon notification or of becoming aware that any part of the BCVWD Water System has been intentionally trespassed, vandalized and/or sabotaged, this emergency response plan will be immediately implemented.

The emergency response plan for this type of situation will include specific initial notifications, response actions, recovery actions, recovery notifications, appropriate utility elements and remediation actions.

Trespass, vandalism and possible sabotage are handled to a large extent by planning and prevention. Most of the facilities are fenced, gated, locked and constructed to minimize

trespass or damage by vandalism. Concerted efforts to stop trespassing and/or damage to facilities, however, cannot be economically prevented.

Preventive actions obtained by applying certain physical and electronic security applications, law enforcement agencies and an alert operating force are also strong deterrents to reducing acts of trespass, vandalism and sabotage as well as the consequent damage. Staff should be aware of suspicious parties that may be loitering near facilities, notify the proper contact(s) or Law Enforcement, make a written note of license plates, descriptions, etc., of suspicious parties, and wait for assistance to arrive , or if appropriate, approach the individuals to ascertain there purpose and identity.

## 2. INITIAL NOTIFICATION

- a. Notify BCVWD Director of Operations and/or Supervisor. Supervisor should communicate the matter to Human Resources and Risk Management and/or Department Head whenever possible.
- b. Activate BCVWD Response Personnel to their respective assignments.
- c. Activate BCVWD notification plan for this particular event (see Notification Matrix).

## 3. RESPONSE ACTIONS

- a. TRESPASSER(s) - Notify BCVWD Supervisor. If conditions warrant (late at night, secluded areas, other than normally public areas), the immediate dispatching of law enforcement to scene should occur. BCVWD employees should standby to meet and assist law enforcement or be available to handle any water related issues. In all cases of trespassers, appropriate identification, vehicle license, etc. should be obtained and then, as appropriate to circumstances, direct them to leave or be prepared to file criminal trespass charges.
- b. VANDALISM and SABOTAGE - Notify BCVWD Supervisor. Immediately notify law enforcement and request presence at the scene. BCVWD employees should standby to meet and assist law enforcement or be available to handle any water related issues.
- c. If damage has occurred, deploy emergency response team, treat as crime scene. Standby and be available to assist local/county/state law enforcement and/or FBI to process crime scene for evidence preservation.
- d. Coordinate alternative water supply, as needed.
- e. Consider increasing security measures.
- f. Based on extent or type of damage, consider alternate (interim) processes in order to maintain at least some level of continued service if applicable.

#### 4. RECOVERY ACTIONS

BCVWD personnel should begin recovery actions as soon as practical after trespasser(s) removed, damaged assessed and/or process, facility or activity has been isolated from the rest of the utility facilities or determined that the threat is no longer present.

#### 5. RECOVERY NOTIFICATIONS

Activate notification plan for this particular event.

#### 6. APPROPRIATE UTILITY ELEMENTS

- a. Dependent on the feedback from damage assessment teams.
- b. Implement damage recovery plan.

#### 7. REMEDIATION ACTIONS

- a. Repair damage.
- b. Assess need for additional protection/ security measures for the property or damaged equipment/facility.



## H. MAJOR THEFT of EQUIPMENT or CHEMICALS (Security related)

### Man-Made and/or Technological Emergencies

#### NOTICE:

“The response to a security event requires due care. In addition to the damage or possible damage present, the event may be considered a criminal act and the area a crime scene. As such, the physical area surrounding the entry point or breach of the system is normally considered a “crime scene”. The crime scene needs to be protected in its original state as to when the crime occurred until it can be processed for evidence leading to the perpetrators and/ or methods utilized in the act. Care must be taken not to disturb what occurred yet action may be taken to avert any immediate threat to life or significant damage to the water system. This area will become restricted to “law enforcement personnel only” once they arrive. This action may preclude BCVWD personnel from entering unless they are specifically authorized to by the police.”

#### 1. GENERAL

These events are based on the threat of or actual theft of major equipment or chemicals of water system property or the water system (at any point within the system).

Under Presidential Decision Directive (PDD) 63 issued on May 22, 1998, the United States Environmental Protection Agency (USEPA) was designated as the lead federal agency to assess and address the vulnerabilities of the Nation's water supply infrastructure. Following the terrorist attacks of September 11, 2001, the President signed the Public Health Security and Bio-Terrorism Preparedness and Response Act of 2002 into law (PL 107-188) (June 12, 2002). Per this Act, community water systems had to conduct vulnerability assessments (V/As) within mandated deadlines and prepare emergency response plans (ERPs).

To aid this effort, USEPA directed efforts to reduce the vulnerability of water systems to terrorist attacks, to enhance their security and ability to respond to emergency situations.

Upon notification or of becoming aware that any part of the BCVWD Water System has been the victim of a major theft of equipment or chemicals, this emergency response plan will be immediately implemented.

The emergency response plan for this type of situation will include specific initial notifications, response actions, recovery actions, recovery notifications, appropriate utility elements and remediation actions.

Theft of equipment and chemicals may and can occur at almost any time. Facilities are fenced, gated, locked and constructed to minimize theft. Concerted efforts to stop theft of equipment and chemicals, however, cannot be economically prevented.

Preventive actions obtained by applying certain physical and electronic security applications, law enforcement agencies and an alert operating force are also strong deterrents to reducing acts of theft. Staff should be aware of suspicious parties that may be loitering near facilities, notify the proper contact(s) or Law Enforcement, make a written note of license plates, descriptions, etc., of suspicious parties, and wait for assistance to arrive, or if appropriate, approach the individuals to ascertain their purpose and identity.

## 2. INITIAL NOTIFICATION

- a. Notify BCVWD Supervisor. Supervisor should communicate the matter to Human Resources and Risk Management and/or Department Head whenever possible.
- b. Activate BCVWD Response Personnel to their respective assignments.
- c. Activate BCVWD notification plan for this particular event (see Notification Matrix).

## 3. RESPONSE ACTIONS

- a. Upon the discovery of missing equipment or chemicals, immediately notify BCVWD Supervision and management. Try to ascertain if equipment or chemicals were moved in an authorized manner. Time is of an essence.
- b. If a reasonable search and inquiry (short period of time) do not provide an answer for the disappearance, immediately notify law enforcement and request presence at the scene. BCVWD employees should standby to meet and assist law enforcement or be available to handle any water related issues.
- c. Activate the damage assessment team.
- d. Consider increasing security measures.
- e. Based on extent or type of theft, consider alternate (interim) processes in order to maintain at least some level of continued service if applicable.
- f. The General Manager will determine with the Board of Directors, and law enforcement the type of news release that should be given out to the public, if any.
- g. Obtain statements from all personnel as to the last time they saw the item(s) prior to their becoming missing.
- h. Notify insurance broker and carrier.

#### 4. RECOVERY ACTIONS

BCVWD personnel should begin recovery actions as soon as practical after theft items have been isolated from the rest of the utility facilities or determined that the threat is no longer present or can be dealt with by some other means.

#### 5. RECOVERY NOTIFICATIONS

Activate notification plan for this particular event.

#### 6. APPROPRIATE UTILITY ELEMENTS

- a. Dependent on the feedback from damage assessment teams.
- b. Implement damage recovery plan.

#### 7. REMEDIATION ACTIONS

- a. Replace equipment and chemicals.
- b. Assess need for additional protection/ security measures for the property or damaged equipment/facility.

## I. CONTAMINATION (Security related)

### Man-Made and/or Technological Emergencies

#### NOTICE

##### Water Contamination

“The response to a security event requires due care. In addition to the threat, danger or possible damage present, the event may be considered a criminal act and the area a crime scene. As such, the physical area surrounding the entry point or breach of the system is normally considered a “crime scene”. The crime scene needs to be protected in its original state as to when the crime occurred until it can be processed for evidence leading to the perpetrators and/or methods utilized in the act. Care must be taken not to disturb what occurred yet action may be taken to avert any immediate threat to life or significant damage to the water system. This area may become restricted to “law enforcement personnel only” once they arrive. This action may preclude BCVWD personnel from entering unless they are specifically authorized to by the police.”

#### 1. GENERAL

- a. Any event that impacts distribution water quality to the point that public health is immediately threatened, is based on the water utility being notified by proper authority or discovering that there may be a water contamination occurrence, will activate this section.

Under Presidential Decision Directive (PDD) 63 issued on May 22, 1998, the United States Environmental Protection Agency (USEPA) was designated as the lead federal agency to assess and address the vulnerabilities of the Nation's water supply infrastructure. Following the terrorist attacks of September 11, 2001, the President signed the Public Health Security and Bio-Terrorism Preparedness and Response Act of 2002 into law (PL 107-188) (June 12, 2002). Per this Act, community water systems had to conduct vulnerability assessments (V/As) within mandated deadlines and prepare emergency response plans (ERPs).

To aid this effort, USEPA directed efforts to reduce the vulnerability of water systems to terrorist attacks, to enhance their security and ability to respond to emergency situations.

Upon notification or of becoming aware that any part of the BCVWD Water System has a potential contamination, this emergency response plan will be immediately implemented.

The emergency response plan for this type of situation will include specific initial notifications, response actions, recovery actions, recovery notifications, appropriate utility elements and remediation actions.

- b. Contamination Types can be generally categorized as disease causing organisms from bacterial, viral or parasites (biological); chemical; organic; radiological.

## 2. INITIAL NOTIFICATION

- a. Activate BCVWD Emergency Response Personnel to their respective assignments and if necessary activate the Emergency Notification Plan (ENP) by contacting the State Water Resources Control Board, Division of Drinking Water.
- b. Activate notification plan for this particular event (see Notification Matrix).
- c. Public Notice Types
  - A. “Boil Order” - Notice to boil water prior to use is issued by the California State Water Resources Control Board (SWRCB) and is called a Boil Water Order. It is used only in the event that the water supply is found to be contaminated or is likely to be contaminated with disease-causing organisms that boiling will neutralize the effects. As an alternative, chlorine bleach can be used with similar effect. See APPENDIX C for an example of the order language.
  - B. “Unsafe Water Alert” - Notice on non-portability of water is issued in order to prevent the public from drinking the water is called an Unsafe Water Alert. It is required if toxic levels of metals, radiological, or organics are found in the water supply. It is issued by the California State Water Resources Control Board (SWRCB) and contents must be approved by (SWRCB). See APPENDIX D for an example of the alert language.

## 3. RESPONSE ACTIONS

NOTE: Patient symptoms should be used to narrow the list of potential contaminants.

- a. Source Water
  - 1. Increase sampling at or near water intakes.
  - 2. Consider whether to isolate the water source if possible.
- b. Water Distribution/ Storage

Isolate the water, drain and disinfect as necessary in the effected area, sample to confirm contaminant.

#### 4. RECOVERY ACTIONS

NOTE: Recovery actions may be tailored to a specified (identified) material if the physical properties for the material are known.

BCVWD personnel should begin recovery actions once contaminant is through the system.

#### 5. RECOVERY NOTIFICATIONS

Activate Emergency Notification Plan (ENP) and per this particular event (see notification matrix).

#### 6. APPROPRIATE UTILITY ELEMENTS

- a. Sample appropriate system storage tanks, wells, facilities etc. to determine if residual contamination exists.
- b. Flush system based on results of sampling and monitor for Free Chlorine Residual.
- c. Monitor health of employees pursuant to medical provider's advice.
- d. Plan for the appropriate disposition of personal protection equipment (PPE) and other equipment.

#### 7. REMEDIATION ACTIONS

NOTE: Remediation actions may be tailored to a specified (identified) material if the physical properties for the material are known.

- a. Based on sampling results, assess need to remediate or modify processes regarding storage tanks, wells and facilities.
- b. Dispose of PPE and other equipment.
- c. Identify recommendations for future facility protection.

## J. CONTAMINATION at MAJOR EVENT (Security related)

### Man-Made and/or Technological Emergencies

#### NOTICE:

“The response to a security event requires due care. In addition to the threat, danger or possible damage present, the event may be considered a criminal act and the area a crime scene. As such, the physical area surrounding the entry point or breach of the system is normally considered a “crime scene”. The crime scene needs to be protected in its original state as to when the crime occurred until it can be processed for evidence leading to the perpetrators and/ or methods utilized in the act. Care must be taken not to disturb what occurred yet action may be taken to avert any immediate threat to life or significant damage to the water system. This area may become restricted to “law enforcement personnel only” once they arrive. This action may preclude BCVWD personnel from entering unless they are specifically authorized to by the police.”

#### 1. GENERAL

This event is based on the threat of, or actual, intentional introduction of a contaminant into the water system at a sports area, convention center or similar public facility.

Under Presidential Decision Directive (PDD) 63 issued on May 22, 1998, the United States Environmental Protection Agency (USEPA) was designated as the lead federal agency to assess and address the vulnerabilities of the Nation's water supply infrastructure. Following the terrorist attacks of September 11, 2001, the President signed the Public Health Security and Bio-Terrorism Preparedness and Response Act of 2002 into law (PL 107-188) (June 12, 2002). Per this Act, community water systems had to conduct vulnerability assessments (V/As) within mandated deadlines and prepare emergency response plans (ERPs).

To aid this effort, USEPA directed efforts to reduce the vulnerability of water systems to terrorist attacks, to enhance their security and ability to respond to emergency situations.

Upon notification or of becoming aware that any part of the BCVWD Water System has been notified of a threat against or actual intentionally contamination at a major event, this emergency response plan will be immediately implemented.

The emergency response plan for this type of situation will include specific initial notifications, response actions, recovery actions, recovery notifications, appropriate utility elements and remediation actions.

## 2. INITIAL NOTIFICATION

- a. Activate BCVWD Response Personnel to their respective assignments and if necessary activate the Emergency Notification Plan (ENP) by contacting the State Water Resources Control Board, Division of Drinking Water.
- a. Activate notification plan for this particular event (see Notification Matrix).

## 3. RESPONSE ACTIONS

- a. Source Water  
NO recommended action to take.
- b. Water Distribution/ Storage
  - 1. Isolate water in the distribution system and at the particular site.
  - 2. Sample the water to confirm the contamination.
  - 3. Drain the contaminated water and disinfect.
  - 4. Provide alternate water source.

## 4. RECOVERY ACTIONS

BCVWD personnel should begin recovery actions once contaminant is through the system.

## 5. RECOVERY NOTIFICATIONS

Activate notification plan for this particular event.

## 6. WATER DISTRIBUTION/ STORAGE

- a. Do NOT flush distribution system via hydrants.
- b. Move to prevent any risk of backflow. Install backflow prevention devices or isolate all services in the affected area to the event prior to recovering facility's water system.

## 7. REMEDIATION ACTIONS

Water Distribution/ Storage  
Assess need to decontaminate/ replace distribution system components.



**K. NOTIFICATION by CALIFORNIA STATE WATER RESOURCES CONTROL BOARD,  
DIVISION OF DRINKING WATER of CONTAMINANT (Security related)**

Man-Made and/or Technological Emergencies

**NOTICE:**

“The response to a security event requires due care. In addition to the threat, danger or possible damage present, the event may be considered a criminal act and the area a crime scene. As such, the physical area surrounding the entry point or breach of the system is normally considered a “crime scene”. The crime scene needs to be protected in its original state as to when the crime occurred until it can be processed for evidence leading to the perpetrators and/ or methods utilized in the act. Care must be taken not to disturb what occurred yet action may be taken to avert any immediate threat to life or significant damage to the water system. This area may become restricted to “law enforcement personnel only” once they arrive. This action may preclude BCVWD personnel from entering unless they are specifically authorized to by the police.”

**1. GENERAL**

This event is based on the water utility being notified by California State Water Resources Control Board (SWRCB) officials of potential contamination based on symptoms of patients.

Under Presidential Decision Directive (PDD) 63 issued on May 22, 1998, the United States Environmental Protection Agency (USEPA) was designated as the lead federal agency to assess and address the vulnerabilities of the Nation's water supply infrastructure. Following the terrorist attacks of September 11, 2001, the President signed the Public Health Security and Bio-Terrorism Preparedness and Response Act of 2002 into law (PL 107-188) (June 12, 2002). Per this Act, community water systems had to conduct vulnerability assessments (V/As) within mandated deadlines and prepare emergency response plans (ERPs).

To aid this effort, USEPA directed efforts to reduce the vulnerability of water systems to terrorist attacks, to enhance their security and ability to respond to emergency situations.

Upon notification or of becoming aware that any part of the BCVWD Water System has a potential contamination, this emergency response plan will be immediately implemented.

The emergency response plan for this type of situation will include specific initial notifications, response actions, recovery actions, recovery actions, appropriate utility elements and remediation actions.

## 2. INITIAL NOTIFICATION

- a. Activate BCVWD Response Personnel to their respective assignments.
- b. Activate notification plan for this particular event (see Notification Matrix).

## 3. RESPONSE ACTIONS

NOTE: Patient symptoms should be used to narrow the list of potential contaminants.

- a. Source Water
  - 1. Increase sampling at or near source water.
  - 2. Consider whether to isolate the water source if possible.
- b. Drinking Water Treatment Facility
  - 1. Increase sampling efforts.
  - 2. Consider whether to continue normal operations (If reduction or stoppage is outcome, provide notification to customers/ issue alerts).
- c. Water Distribution/ Storage
  - 1. Increase sampling in the area potentially affected and at locations where the contaminant could have migrated to. It is important to consider the time between exposure and the onset of symptoms to select sampling sites.
  - 2. Consider whether to isolate.
  - 3. Consider whether to increase residual disinfectant level..

## 4. RECOVERY ACTIONS

BCVWD personnel should begin recovery actions once contaminant is through the system.

## 5. RECOVERY NOTIFICATIONS

- a. Activate notification plan for this particular event.
- b. Assist California State Water Resources Control Board.

## 6. APPROPRIATE UTILITY ELEMENTS

- a. Sample appropriate system elements (storage tanks, wells, facilities) to determine if residual contamination exists.
- b. Flush system based on results of sampling.

- c. Monitor health of employees.
- d. Plan for the appropriate disposition of personal protection equipment (PPE) and other equipment.

## 7. REMEDIATION ACTIONS

- a. Based on sampling results – assess need to remediate storage tanks, Wells and facilities.
- b. Plan for appropriate disposition of Personal Protective Equipment (PPE) and other equipment.

## L. UNAUTHORIZED SCADA ACTIVITY (Security related)

### Man-Made and/or Technological Emergencies

#### NOTICE:

“The response to a security event requires due care. In addition to the threat, danger, or possible damage present, the event may be considered a criminal act and the area a crime scene. As such, the physical area surrounding the entry point or breach of the system is normally considered a “crime scene”. The crime scene needs to be protected in its original state as to when the crime occurred until it can be processed for evidence leading to the perpetrators and/ or methods utilized in the act. Care must be taken not to disturb what occurred yet action may be taken to avert any immediate threat to life or significant damage to the water system. This area may become restricted to “law enforcement personnel only” once they arrive. This action may preclude BCVWD personnel from entering unless they are specifically authorized to by the police.”

#### 1. GENERAL

This event is based on either internal or external unauthorized intrusion of the Supervisory Control and Data Acquisition (SCADA) system.

Under Presidential Decision Directive (PDD) 63 issued on May 22, 1998, the United States Environmental Protection Agency (USEPA) was designated as the lead federal agency to assess and address the vulnerabilities of the Nation's water supply infrastructure. Following the terrorist attacks of September 11, 2001, the President signed the Public Health Security and Bio-Terrorism Preparedness and Response Act of 2002 into law (PL 107-188) (June 12, 2002). Per this Act, community water systems had to conduct vulnerability assessments (V/As) within mandated deadlines and prepare emergency response plans (ERPs).

To aid this effort, USEPA directed efforts to reduce the vulnerability of water systems to terrorist attacks, to enhance their security and ability to respond to emergency situations.

Upon notification or of becoming aware of an unauthorized intrusion of any part of the BCVWD Water System through SCADA, this emergency response plan will be immediately implemented.

The emergency response plan for this type of situation will include specific initial notifications, response actions, recovery actions, recovery notifications, appropriate utility elements and remediation actions.

## 2. INITIAL NOTIFICATION

- a. Activate BCVWD Emergency Response Teams to their respective assignments and notify the Information Technology Department. The information technology department maintains Information Technology Incident Response plans depending on the type of breach.
- b. Activate notification plan for this particular event (see Notification Matrix).

## 3. RESPONSE ACTIONS

- a. Conduct an initial assessment of the SCADA to determine impact of the intrusion and potential for hazard. Based on findings, determine if additional steps are needed as describe below.
- b. Source Water
  1. Increase sampling at or near source water.
  2. Consider whether to isolate the water source if possible.
  3. Temporary shut down SCADA system and implement manual operation using established protocol.
- c. Water Distribution/ Storage
  1. Monitor unmanned components (storage tanks and pumping stations).
  2. Consider whether to isolate.

## 4. RECOVERY ACTIONS

BCVWD personnel shall initiate recovery actions only after the confirmed elimination of the intrusion and the complete purge of any unsafe water from the system, in accordance with applicable safety and regulatory standards. The Information Technology Department shall recover backend systems according to the BCVWD Information Technology Incident Response Plan, tailored to the nature of the incident.

## 5. RECOVERY NOTIFICATIONS

Activate the appropriate notification plan based on the nature of the incident.

## 6. APPROPRIATE UTILITY ELEMENTS

- a. Preserve Digital Evidence - The Information Technology Department will lead all recovery efforts to preserve digital evidence. Forensic image copies of all relevant system logs will be made to ensure evidentiary integrity. Coordination with local, state, and federal agencies, including the FBI, Fusion Centers, the Cybersecurity and Infrastructure Security Agency

(CISA), and cybersecurity insurance providers, will occur as appropriate. Notifications will be made based on the nature and severity of the incident.

- b. Eliminate Malicious Code - The Information Technology Department will inspect all systems for implanted backdoors, rootkits, or other forms of malicious code. Identified threats will be fully removed prior to any attempt to restore or restart SCADA systems. Interagency coordination will be pursued as appropriate.
- c. SCADA System Recovery Protocol - The Information Technology Department will follow established District policies for SCADA recovery and restoration of automated control functions. Safeguards will be implemented prior to restart. The department will issue guidance based on the specific incident and brief all relevant staff before bringing SCADA systems back online.
- d. System Monitoring and Validation - Upon restoration of SCADA operations, the system will be closely monitored. Verification of SCADA system set points and confirmation of full operational visibility will be conducted to ensure secure and proper function.

## 7. REMEDIATION ACTIONS

- a. Harden SCADA Security Posture - Assess and implement additional security measures for SCADA systems based on lessons learned from the incident. This may include enhancements to access controls, network segmentation, anomaly detection, and other protective technologies.
- b. The Information Technology Department will evaluate relevant cyber threat intelligence and apply any appropriate protective measures to safeguard BCVWD systems. This includes leveraging trusted resources, intelligence-sharing networks, and emerging guidance applicable to the water sector.

## **M. INTENTIONAL DAMAGE to STRUCTURE (Security related)**

Man-Made and/or Technological Emergencies

### **NOTICE:**

#### **SIGNIFICANT STRUCTURAL DAMAGE RESULTING from an INTENTIONAL ACT**

The response to a security event requires due care. In addition to the threat, danger, or possible damage present, the event may be considered a criminal act and the area a crime scene. As such, the physical area surrounding the entry point or breach of the system is normally considered a “crime scene”. The crime scene needs to be protected in its original state as to when the crime occurred until it can be processed for evidence leading to the perpetrators and/ or methods utilized in the act. Care must be taken not to disturb what occurred yet action may be taken to avert any immediate threat to life or significant damage to the water system. This area may become restricted to “law enforcement personnel only” once they arrive. This action may preclude BCVWD personnel from entering unless they are specifically authorized to by the police.”

### **1. GENERAL**

This event is based on intentional structural damage to water system components designed to disrupt normal system operations.

Under Presidential Decision Directive (PDD) 63, issued on May 22, 1998, the United States Environmental Protection Agency (USEPA) was designated as the lead federal agency to assess and address the vulnerabilities of the nation's water supply infrastructure. Following the terrorist attacks of September 11, 2001, the President signed the Public Health Security and Bioterrorism Preparedness and Response Act of 2002 (Public Law 107-188) into law on June 12, 2002. Under this Act, community water systems were required to conduct vulnerability assessments (V/As) within mandated deadlines and develop Emergency Response Plans (ERPs). In recent years, Executive Order 14028 – Improving the Nation’s Cybersecurity – has further strengthened the national strategy for protecting critical infrastructure, including the water sector, through enhanced threat detection, incident response, and system resilience.

To support these efforts, USEPA directed resources to help reduce the vulnerability of water systems to terrorist attacks and improve their resilience and capacity to respond to emergency situations.

Upon notification of, or becoming aware that, any part of the BCVWD Water System has sustained significant structural damage from an intentional act, this Emergency Response Plan

shall be immediately implemented.

The emergency response plan for this type of situation will include specific initial notifications, response actions, recovery notifications, recovery actions, appropriate utility elements, and remediation actions. Any event involving SCADA systems, computer systems, or other digital infrastructure shall be immediately coordinated with the BCVWD Information Technology Department, which is responsible for managing and securing the District's operational technology and information systems.

## 2. INITIAL NOTIFICATION

- a. Activate BCVWD Emergency Response Personnel to their respective assignments.
- b. Activate notification plan for this particular event (see Notification Matrix).

## 3. RESPONSE ACTIONS

- a. Deploy Emergency Response Teams, treat as crime scene – Consult local/state law enforcement and FBI on evidence preservation.
- b. Inform law enforcement and FBI of potential hazardous materials.
- c. Coordinate alternative water supply, as needed.
- d. Consider increasing security measures.
- e. Based on extent of damage, consider alternate (interim) treatment schemes to maintain chlorine residual.

## 4. RECOVERY ACTIONS

BCVWD personnel should begin recovery actions as soon as practical after damaged facility is isolated from the rest of the utility facilities.

## 5. RECOVERY NOTIFICATIONS

Activate notification plan for this particular event.

## 6. APPROPRIATE UTILITY ELEMENTS

- a. Dependent on the feedback from damage assessment teams.
- b. Implement damage recovery plan.

## 7. REMEDIATION ACTIONS

- a. Repair damage.



- b. Assess need for additional protection/ security measures for the damaged facility and other critical facilities within the utility.

## APPENDIX A

The Beaumont Cherry Valley Water District's initial response to an emergency will be to determine the level of mobilization necessary to meet the immediate, primary objectives. The level of mobilization will be dictated by the initial preliminary inspection of facilities.

<b>MOBILIZATION LEVELS DEFINED</b>			
Level of Emergency	Richter Scale	Mercalli Scale	Level of Mobilization
Level 1 Mobilization	Less than 5.5	1-V1	Limited Mobilization required. (Duty person performs initial assessment checking the telemetry system at the District Headquarters, monitors radio and pager for damage reports from the public and activates initial response team and EOC as necessary.)
Level 2 Mobilization	5.5 to 6.0	V1 - V111	Mobilization required. (Initial Response Team is activated and all assessments reported to EOC.)
Level 3 Mobilization	6.1 to 10	V111 - X11	Full mobilization required, outside services and equipment needed. (EOC activated, action plan developed based on incoming assessments.)

## APPENDIX B

### INITIAL RESPONSE CHECKLIST PRIORITY I ROUTE 1

Date: \_\_\_\_\_ Time: \_\_\_\_\_ Emergency: \_\_\_\_\_

MAGNITUDE: \_\_\_\_\_ EPICENTER: \_\_\_\_\_

FACILITY INSPECTED	CHECKED BY	TIME
1. Reservoir	_____	_____
2. Well	_____	_____
3. Reservoir	_____	_____
4. Reservoir	_____	_____
	_____	_____
	_____	_____

Notify the System Dispatcher:  
"Route 1, Priority I Inspection Complete."  
Unless otherwise instructed, report to the EOC.

COMMENTS:

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## APPENDIX B continued

### INITIAL RESPONSE CHECKLIST PRIORITY I ROUTE 2

**Date:** \_\_\_\_\_ **Time:** \_\_\_\_\_ **Emergency:** \_\_\_\_\_

**MAGNITUDE:** \_\_\_\_\_ **EPICENTER:** \_\_\_\_\_

FACILITY INSPECTED	CHECKED BY	TIME
1. Reservoir	_____	_____
2. Well	_____	_____
3. Well	_____	_____
4. Well	_____	_____
5. Well	_____	_____

**Notify the System Dispatcher:**  
" Route 2, Priority I Inspection Complete."  
Unless otherwise instructed, report to the EOC.

**COMMENTS:**

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## APPENDIX B continued

### INITIAL RESPONSE CHECKLIST PRIORITY I ROUTE 3

**Date:** \_\_\_\_\_ **Time:** \_\_\_\_\_ **Emergency:** \_\_\_\_\_

**MAGNITUDE:** \_\_\_\_\_ **EPICENTER:** \_\_\_\_\_

FACILITY INSPECTED	CHECKED BY	TIME
1. Reservoir	_____	_____
2. Well	_____	_____
3. Well	_____	_____
4. Reservoir	_____	_____
5. Reservoir	_____	_____
6. Chlorine	_____	_____

**Notify the System Dispatcher:**  
" Route 3, Priority I inspection Complete."  
Unless otherwise instructed, report to the EOC.

**COMMENTS:**

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**APPENDIX C**  
**BEAUMONT-CHERRY VALLEY WATER DISTRICT**  
**[Month/Day/Year]**

**BOIL WATER NOTICE**

**Boil Your Water Before Drinking or Food Preparation to Avoid Illness**

Due to the recent [event (e.g., water outage, power outage, flood, fire, earthquake or other emergency)], which occurred on [date], the State Water Resources Control Board, Division of Drinking Water, the [County Name] County Health Department, and the [Water System name] Water System are advising residents of [City, Town, System] to only use boiled tap water or bottled water for drinking and cooking purposes as a safety precaution to avoid stomach or intestinal illness. The affected area includes: [INSERT GEOGRAPHICAL DESCRIPTION, STREET BOUNDARIES, ETC.]

We will inform you when tests show that water is safe to drink, and you no longer need to boil your water. We anticipate resolving the problem within [estimated time frame].

If you have questions about other uses of tap water, such as bathing and dish washing, please call your water system or read this guidance: [https://waterboards.ca.gov/drinking\\_water/certlic/drinkingwater/documents/notices/cdc\\_wtd\\_bw\\_advisory.docx](https://waterboards.ca.gov/drinking_water/certlic/drinkingwater/documents/notices/cdc_wtd_bw_advisory.docx)

Optional: Potable water is available at the following locations: [List locations]

Please bring a clean water container (5 gallons maximum capacity).

**Do not drink the water without boiling it first**

- Boil all water for one (1) minute (rolling boil).
- Let water cool before drinking.
- Use boiled or bottled water for drinking, brushing teeth, and food preparation until further notice.
- Boiling water kills bacteria and other organisms in the water.

**If you are unable to boil your water:**

Household unscented liquid bleach

- For clear water, use 8 drops (1/8 tsp.) of bleach for 1 gallon of water. For cloudy water, filter through a clean cloth and use 16 drops (1/4 tsp.) of bleach for 1 gallon of water.
- Mix well. Allow to stand for 30 minutes before using.
- Water may taste or smell like chlorine. This means disinfection has occurred.

Water disinfection tablets

- Please follow the manufacturer's instructions.

**For More Information**

If you are concerned about your health or the health of a family member, contact your health care provider or [local health department].

**Water Utility contact:** [Utility Representative Name, title, phone & address]

**State Water Resources Control Board District Office:** [(XXX) XXX-XXXX]

**Local Environmental Health Jurisdiction:** [XXXXX County at (XXX) XXX-XXXX]

Please share or post this information with others who drink this water, especially those who may not have received this notice directly (for example, people in apartments, nursing homes, schools, and businesses). You can do this by posting this notice in a public place or distributing copies by hand or mail.

## APPENDIX D UNSAFE WATER ALERT

[Insert one-liner language other than Spanish here, if needed, otherwise delete.]

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**Beaumont-Cherry Valley Water District water is possibly contaminated  
with [an unknown substance]**

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### DO NOT DRINK YOUR WATER

Failure to follow this advisory could result in illness.

An unknown substance has been added to the drinking water supplied by the [Water System Name] due to a recent [intrusion; break-in] at [one of the wells; our treatment plant; storage tank; specific facility]. The State Water Resources Control Board, [County Name] County Health Department, and [Water System name] Water System are advising residents of [City, Town, System] to NOT USE THE TAP WATER FOR DRINKING AND COOKING UNTIL FURTHER NOTICE.

#### What should I do?

- **DO NOT DRINK YOUR TAP WATER---USE ONLY BOTTLED WATER.** Bottled water should be used for all drinking (including baby formula and juice), brushing teeth, washing dishes, making ice and food preparation **until further notice**.
- **DO NOT TRY AND TREAT THE WATER YOURSELF.** Boiling, freezing, filtering, adding chlorine or other disinfectants, or letting water stand will not make the water safe.
- Optional: Potable water is available at the following locations: [List locations]  
Please bring a clean water container (5 gallons maximum capacity).

**We will inform you when tests show that the water is safe again. We expect to resolve the problem within [estimated time frame].**

For more information call:

Water Utility contact: [Name, title, phone & address of responsible utility representative].

State Water Resources Control Board at: [insert local district office, DE and phone number].

Local County Health Department: [insert phone number of local health department].

This notice is being sent to you by [insert water system name]. California Public Water System ID # [XXXXXXX]. Date Distributed: [date].

*Please share this information with all other people who receive this water, especially those who may not have received this notice directly (for example, people in apartments, nursing homes, schools, and businesses). You can do this by posting this notice in a public place or distributing copies by hand.*



**Beaumont-Cherry Valley Water District  
Personnel Committee Meeting  
June 17, 2025**

**Item 9**

**STAFF REPORT**

**TO:** Personnel Committee

**FROM:** Sylvia Molina, Director of Finance and Administration

**SUBJECT:** Revising the District's Organization Chart and Salary Schedule

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**Staff Recommendation**

Recommend a revision to the District's Organization Chart and Salary Schedule to be submitted to the Board of Directors for approval, or to direct staff as desired.

**Executive Summary**

In 2024, the District conducted a salary survey in accordance with the 2022-2026 Memorandum of Understanding (MOU), which led to the identification of positions that were above and below the market median, which were adjusted within the 2025 Operating Budget. Based on the survey results, four positions were identified as having discrepancies between their actual duties and their existing job classifications, leading to recommended job title adjustments. To ensure transparency and consistency, as staff reviewed these positions, staff proposed deferring these classification updates until mid-2025. The proposed changes are now presented in the form of a revised District Organization Chart and Salary Schedule, with an effective date of July 1, 2025.

**Background**

In 2024, the District conducted a salary survey in accordance with Article 39 of the 2022-2026 Memorandum of Understanding (MOU), which requires an internal market analysis every few years. The survey reviewed salary ranges across all District classifications and compared them to ten regional agencies. The results, which were presented to the Personnel Committee and Board of Directors, indicated that the District was, on average, 7.6% behind the labor market median prior to applying the 2.5% COLA. As part of the Board-approved 2025 Operating Budget, staff incorporated adjustments to align salaries with market rates and applied the COLA across the board.

Based on the salary survey results, four positions were identified as having differences between their actual job duties and their existing classifications. These differences were not part of a formal salary survey but were determined through observed role changes and internal job analysis. While the salary adjustments associated with these positions were included in the 2025 budget under the umbrella of the salary survey, the associated job title and classification changes were deferred for transparency and timing considerations, as staff completed the review of these positions. In particular, two of the four positions did not require additional salary changes beyond what had already been approved in the salary survey. The remaining two positions were recommended for a reclassification as well as additional salary adjustments based on the changes.

To ensure a fair and transparent process, staff recommended grouping all four title changes together and deferring their formal adoption until mid-year 2025. This also allowed time for the completion of the water rate study, which would need to account for any organizational changes. The Board supported this approach, and the positions, including those with salary changes, were





budgeted accordingly with an effective date of July 1, 2025. Now that the water rate study is complete and the positions have been factored into future budgets, the District is prepared to move forward with the proposed updates.

### **Discussion:**

Staff is recommending the following classification and job title updates, which are reflected in the revised District Organization Chart and Salary Schedule, effective July 1, 2025, outlined in Table 1- Proposed Personnel Changes. These changes resulted from the observed difference between existing clarifications and actual duties performed and are intended to improve organizational clarity, align titles with responsibilities, and ensure internal and external equity.

Table 1 – Proposed Personnel Changes

Line	Original Position	Replacement Position	Original Salary Range	Replacement Salary Range	Reason
1	Assistant Director of Finance and Admin.	n/a	60 \$70,554-\$85,758	n/a	Flex Director position filled
2	Customer Service Supervisor	Customer Service & Utility Billing Manager	39 \$92,560-\$112,507	46 \$109,990-\$133,702	Includes billing oversight, regular audits, division budget management, and public outreach
3	Human Resources Manager	Human Resources and Risk Manager	40 \$94,890-\$115,315	50 \$121,430-\$147,597	Increased risk and legal responsibilities District-wide including managing claims, health and safety, and additional internal outreach
4	Director of Information Technology	Director of Information Technology & Cybersecurity	61 \$159,370-\$193,690	61 \$159,370-\$193,690	Title refinement to align with scope of work that includes award winning cybersecurity management

Staff recommends that the Personnel Committee review the proposed changes and recommend forwarding them to the full Board of Directors for final consideration and approval of a resolution to revise the District's Organization Chart and Salary Schedule.

### **Fiscal Impact**

The fiscal impact is \$17,155 for the proposed changes, based on the fully burdened rates of the filled positions. This is an increase of \$6,154 for the Customer Service & Utility Billing



reclassification as well as the \$11,001 for the Human Resources and Risk Manager reclassification, effective July 1, 2025.

There is no impact to the 2025 Operating Budget for the requested changes.

**Attachments**

1. 2025 Organization Chart effective January 1, 2025 (redlined)
2. 2025 Organization Chart effective January 1 and July 1, 2025 (side-by-side)
3. 2025 Organization Chart effective July 1, 2025 (clean)
4. 2025 Salary Schedule effective January 1, 2025 (redlined)
5. 2025 Salary Schedule effective January 1 and July 1, 2025 (side-by-side)
6. 2025 Salary Schedule effective July 1, 2025 (clean)

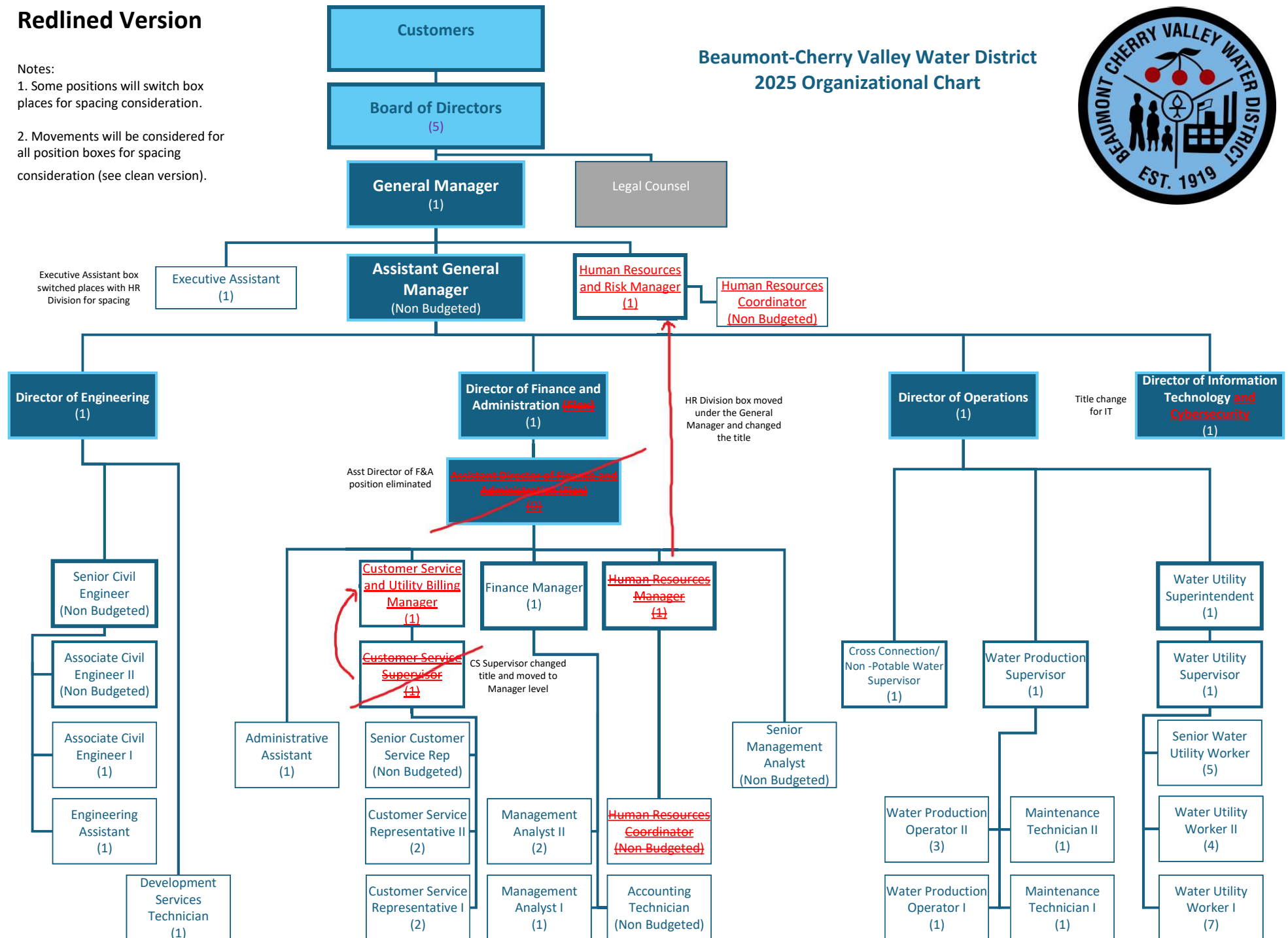
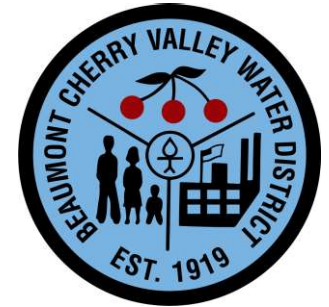
Staff Report prepared by Sylvia Molina, Director of Finance and Administration

## Redlined Version

### Notes:

1. Some positions will switch box places for spacing consideration.
2. Movements will be considered for all position boxes for spacing consideration (see clean version).

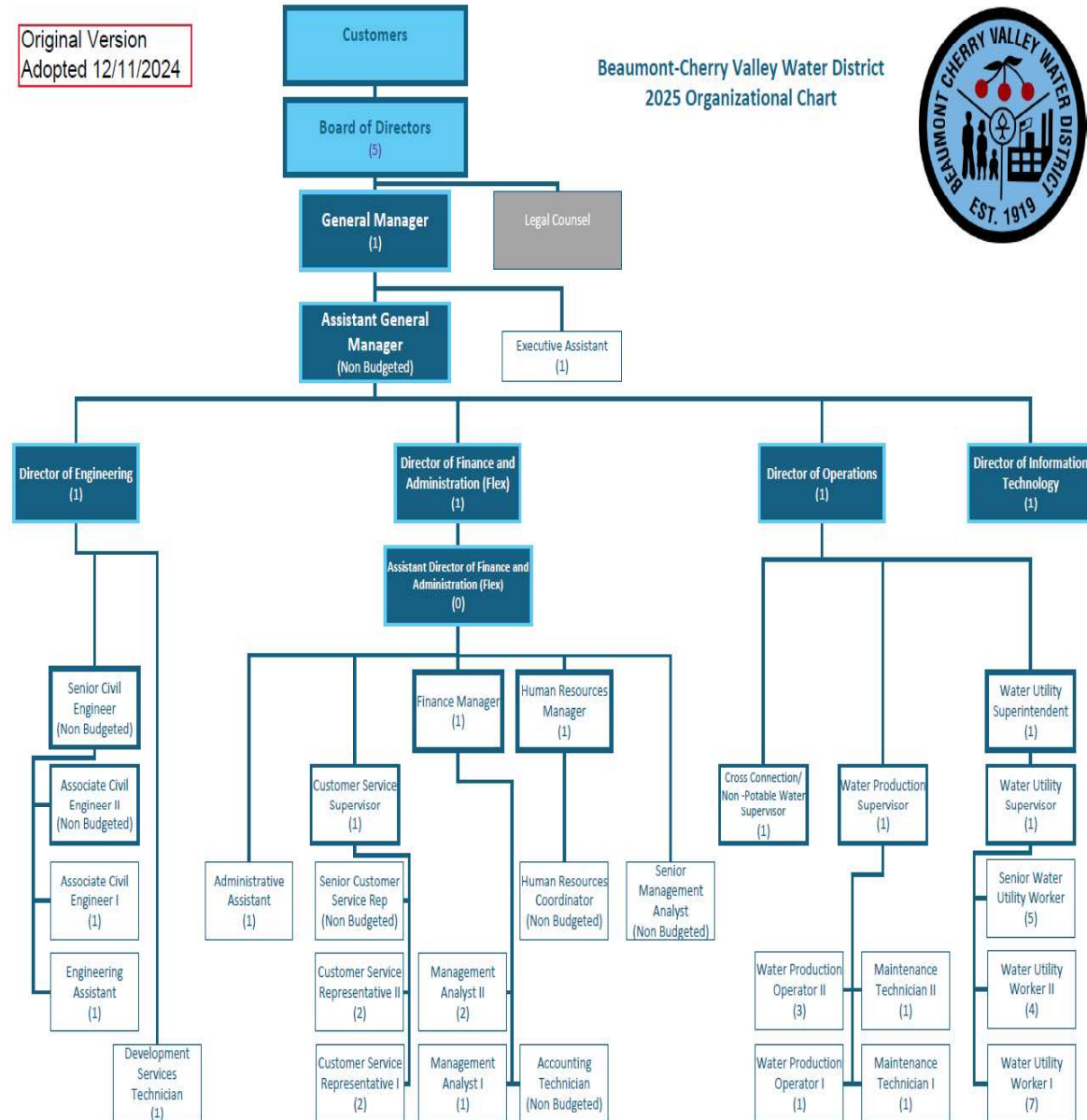
## Beaumont-Cherry Valley Water District 2025 Organizational Chart





Original Version  
Adopted 12/11/2024

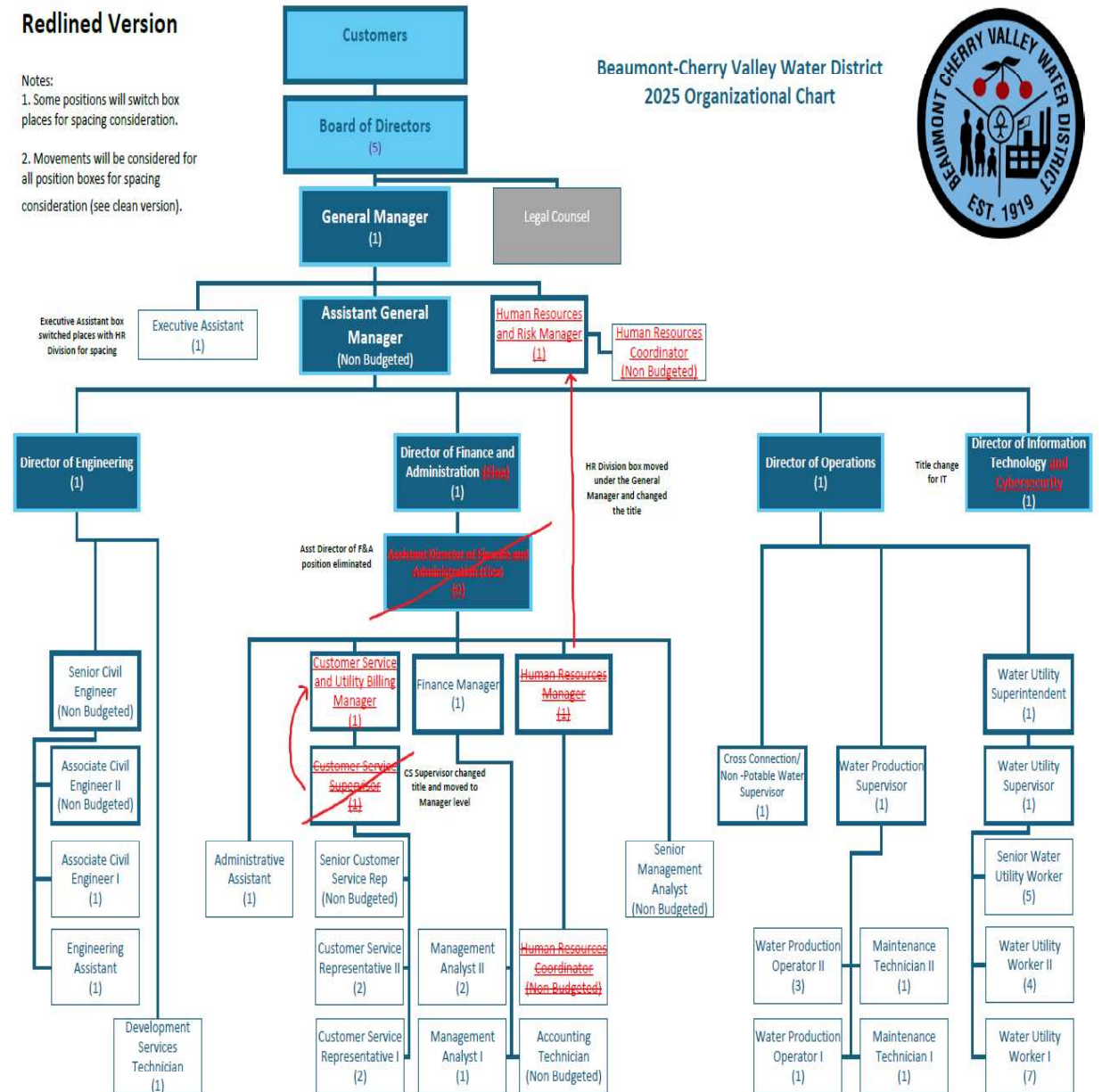
Beaumont-Cherry Valley Water District  
2025 Organizational Chart



Redlined Version

Notes:  
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Beaumont-Cherry Valley Water District  
2025 Organizational Chart



## Clean Version

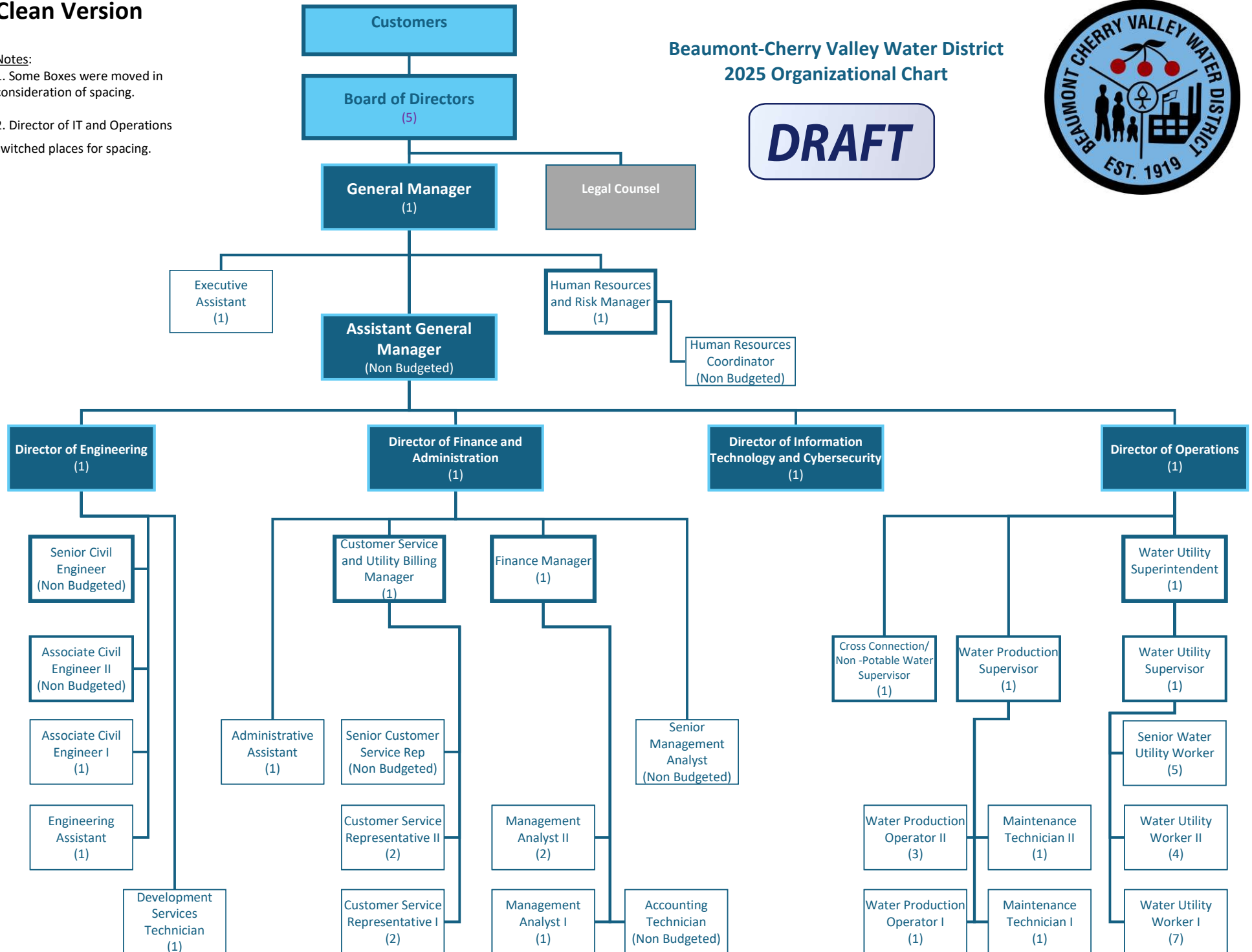
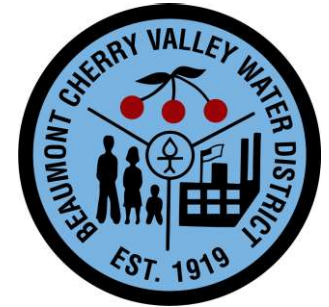
### Notes:

1. Some Boxes were moved in consideration of spacing.

2. Director of IT and Operations switched places for spacing.

## Beaumont-Cherry Valley Water District 2025 Organizational Chart

**DRAFT**



# Beaumont-Cherry Valley Water District Salary Schedule by Classification

Effective: <del>January 4</del> July 1, 2025		Hourly rates (per step)					Annual Range	
Classification	Salary Range*	Step 1	Step 2	Step 3	Step 4	Step 5	(based on 2080 hrs.; rounded to nearest dollar)	
Accounting Technician	26	32.29	33.90	35.59	37.37	39.24	67,163	81,619
Administrative Assistant	25	31.50	33.08	34.73	36.47	38.29	65,520	79,643
<del>Assistant Director of Finance</del>	<del>60</del>	<del>74.73</del>	<del>78.47</del>	<del>82.39</del>	<del>86.51</del>	<del>90.84</del>	<del>155,438</del>	<del>188,947</del>
Assistant General Manager	73	103.01	108.16	113.57	119.25	125.21	214,261	260,437
Associate Civil Engineer I	42	47.92	50.32	52.84	55.48	58.25	99,674	121,160
Associate Civil Engineer II	47	54.21	56.92	59.77	62.76	65.90	112,757	137,072
Cross Connection/Non-Potable Water Supervisor	42	47.92	50.32	52.84	55.48	58.25	99,674	121,160
Customer Service Representative I	20	27.85	29.24	30.70	32.23	33.84	57,928	70,387
Customer Service Representative II	25	31.50	33.08	34.73	36.47	38.29	65,520	79,643
Customer Service & Utility Billing Manager	46	52.88	55.52	58.30	61.22	64.28	109,990	133,702
<del>Customer Service Supervisor</del>	<del>39</del>	<del>44.50</del>	<del>46.72</del>	<del>49.06</del>	<del>51.51</del>	<del>54.09</del>	<del>92,560</del>	<del>112,507</del>
Development Services Technician	22	29.25	30.71	32.25	33.86	35.55	60,840	73,944
Director of Engineering	62	78.52	82.45	86.57	90.90	95.44	163,322	198,515
Director of Finance and Administration	67	88.83	93.27	97.93	102.83	107.97	184,766	224,578
Director of Information Technology and Cybersecurity	61	76.62	80.45	84.47	88.69	93.12	159,370	193,690
<del>Director of Information Technology</del>	<del>64</del>	<del>76.62</del>	<del>80.45</del>	<del>84.47</del>	<del>88.69</del>	<del>93.12</del>	<del>159,370</del>	<del>193,690</del>
Director of Operations	61	76.62	80.45	84.47	88.69	93.12	159,370	193,690
Engineering Assistant	37	42.36	44.48	46.70	49.04	51.49	88,109	107,099
Engineering Intern	4	18.76	19.70	20.69	21.72	22.81	39,021	47,445
Executive Assistant	43	49.11	51.57	54.15	56.86	59.70	102,149	124,176
Finance Manager	50	58.38	61.30	64.36	67.58	70.96	121,430	147,597
General Manager	Contract					132.53	-	275,662
Human Resources Coordinator	33	38.37	40.29	42.30	44.42	46.64	79,810	97,011
Human Resources & Risk Manager	50	58.38	61.30	64.36	67.58	70.96	121,430	147,597
<del>Human Resources Manager</del>	<del>40</del>	<del>45.62</del>	<del>47.90</del>	<del>50.29</del>	<del>52.80</del>	<del>55.44</del>	<del>94,890</del>	<del>115,315</del>
Maintenance Technician I	24	30.73	32.27	33.88	35.57	37.35	63,918	77,688
Maintenance Technician II	28	33.92	35.62	37.40	39.27	41.23	70,554	85,758
Management Analyst I	31	36.53	38.36	40.28	42.29	44.40	75,982	92,352
Management Analyst II	38	43.42	45.59	47.87	50.26	52.77	90,314	109,762
Senior Civil Engineer	53	62.87	66.01	69.31	72.78	76.42	130,770	158,954
Senior Customer Service Rep	30	35.64	37.42	39.29	41.25	43.31	74,131	90,085
Senior Management Analyst	45	51.60	54.18	56.89	59.73	62.72	107,328	130,458
Senior Water Utility Worker	32	37.43	39.30	41.27	43.33	45.50	77,854	94,640
Water Production Operator I	28	33.92	35.62	37.40	39.27	41.23	70,554	85,758
Water Production Operator II	33	38.37	40.29	42.30	44.42	46.64	79,810	97,011
Water Production Supervisor	47	54.21	56.92	59.77	62.76	65.90	112,757	137,072
Water Utility Superintendent	51	59.85	62.84	65.98	69.28	72.74	124,488	151,299
Water Utility Supervisor	44	50.36	52.88	55.52	58.30	61.21	104,749	127,317
Water Utility Worker I	24	30.73	32.27	33.88	35.57	37.35	63,918	77,688
Water Utility Worker II	28	33.92	35.62	37.40	39.27	41.23	70,554	85,758

Board of Directors

\$296.40 per day for meeting attendance in accordance with District rules and regulations

*\*\*Positions highlighted in grey are non-budget positions not intended to be filled in 2025*



**Beaumont-Cherry Valley Water District Salary Schedule by Classification**

Effective: January 1, 2025	Salary Range*	Hourly rates (per step)					Annual Range (based on 2080 hrs., rounded to nearest dollar)	
		Step 1	Step 2	Step 3	Step 4	Step 5		
Accounting Technician	26	32.29	33.90	35.59	37.37	39.24	67,163	81,619
Administrative Assistant	25	31.50	33.08	34.73	36.47	38.29	65,520	79,643
Assistant Director of Finance	60	74.73	78.47	82.39	86.51	90.84	155,438	188,947
Assistant General Manager	73	103.01	108.16	113.57	119.25	125.21	214,261	260,437
Associate Civil Engineer I	42	47.92	50.32	52.84	55.48	58.25	99,674	121,160
Associate Civil Engineer II	47	54.21	56.92	59.77	62.76	65.90	112,757	137,072
Cross Connection/Non-Potable Water Supervisor	42	47.92	50.32	52.84	55.48	58.25	99,674	121,160
Customer Service Representative I	20	27.85	29.24	30.70	32.23	33.84	57,928	70,387
Customer Service Representative II	25	31.50	33.08	34.73	36.47	38.29	65,520	79,643
Customer Service Supervisor	39	44.50	46.72	49.06	51.51	54.09	92,560	112,507
Development Services Technician	22	29.25	30.71	32.25	33.86	35.55	60,840	73,944
Director of Engineering	62	78.52	82.45	86.57	90.90	95.44	163,322	198,515
Director of Finance and Administration	67	88.83	93.27	97.93	102.83	107.97	184,766	224,578
Director of Information Technology	61	76.62	80.45	84.47	88.69	93.12	159,370	193,690
Director of Operations	61	76.62	80.45	84.47	88.69	93.12	159,370	193,690
Engineering Assistant	37	42.36	44.48	46.70	49.04	51.49	88,109	107,099
Engineering Intern	4	18.76	19.70	20.69	21.72	22.81	39,021	47,445
Executive Assistant	43	49.11	51.57	54.15	56.86	59.70	102,149	124,176
Finance Manager	50	58.38	61.30	64.36	67.58	70.96	121,430	147,597
General Manager	Contract					132.53	-	275,662
Human Resources Coordinator	33	38.37	40.29	42.30	44.42	46.64	79,810	97,011
Human Resources Manager	40	45.62	47.90	50.29	52.80	55.44	94,890	115,315
Maintenance Technician I	24	30.73	32.27	33.88	35.57	37.35	63,918	77,688
Maintenance Technician II	28	33.92	35.62	37.40	39.27	41.23	70,554	85,758
Management Analyst I	31	36.53	38.36	40.28	42.29	44.40	75,982	92,352
Management Analyst II	38	43.42	45.59	47.87	50.26	52.77	90,314	109,762
Senior Civil Engineer	53	62.87	66.01	69.31	72.78	76.42	130,770	158,954
Senior Customer Service Rep	30	35.64	37.42	39.29	41.25	43.31	74,131	90,085
Senior Management Analyst	45	51.60	54.18	56.89	59.73	62.72	107,328	130,458
Senior Water Utility Worker	32	37.43	39.30	41.27	43.33	45.50	77,854	94,640
Water Production Operator I	28	33.92	35.62	37.40	39.27	41.23	70,554	85,758
Water Production Operator II	33	38.37	40.29	42.30	44.42	46.64	79,810	97,011
Water Production Supervisor	47	54.21	56.92	59.77	62.76	65.90	112,757	137,072
Water Utility Superintendent	51	59.85	62.84	65.98	69.28	72.74	124,488	151,299
Water Utility Supervisor	44	50.36	52.88	55.52	58.30	61.21	104,749	127,317
Water Utility Worker I	24	30.73	32.27	33.88	35.57	37.35	63,918	77,688
Water Utility Worker II	28	33.92	35.62	37.40	39.27	41.23	70,554	85,758

Board of Directors \$296.40 per day for meeting attendance in accordance with District rules and regulations

*\*\*Positions highlighted in grey are non-budget positions not intended to be filled in 2025*

**Beaumont-Cherry Valley Water District Salary Schedule by Classification**

Effective: <del>January 1</del> July 1, 2025	Salary Range*	Hourly rates (per step)					Annual Range (based on 2080 hrs., rounded to nearest dollar)	
		Step 1	Step 2	Step 3	Step 4	Step 5		
Accounting Technician	26	32.29	33.90	35.59	37.37	39.24	67,163	81,619
Administrative Assistant	25	31.50	33.08	34.73	36.47	38.29	65,520	79,643
<del>Assistant Director of Finance</del>	<del>60</del>	<del>74.73</del>	<del>78.47</del>	<del>82.39</del>	<del>86.51</del>	<del>90.84</del>	<del>155,438</del>	<del>188,947</del>
Assistant General Manager	73	103.01	108.16	113.57	119.25	125.21	214,261	260,437
Associate Civil Engineer I	42	47.92	50.32	52.84	55.48	58.25	99,674	121,160
Associate Civil Engineer II	47	54.21	56.92	59.77	62.76	65.90	112,757	137,072
Cross Connection/Non-Potable Water Supervisor	42	47.92	50.32	52.84	55.48	58.25	99,674	121,160
Customer Service Representative I	20	27.85	29.24	30.70	32.23	33.84	57,928	70,387
Customer Service Representative II	25	31.50	33.08	34.73	36.47	38.29	65,520	79,643
<del>Customer Service &amp; Utility Billing Manager</del>	<del>46</del>	<del>52.88</del>	<del>55.52</del>	<del>58.30</del>	<del>61.22</del>	<del>64.28</del>	<del>109,990</del>	<del>133,702</del>
<del>Customer Service Supervisor</del>	<del>39</del>	<del>44.50</del>	<del>46.72</del>	<del>49.06</del>	<del>51.54</del>	<del>54.09</del>	<del>92,560</del>	<del>112,507</del>
Development Services Technician	22	29.25	30.71	32.25	33.86	35.55	60,840	73,944
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Director of Finance and Administration	67	88.83	93.27	97.93	102.83	107.97	184,766	224,578
<del>Director of Information Technology and Cybersecurity</del>	<del>61</del>	<del>76.62</del>	<del>80.45</del>	<del>84.47</del>	<del>88.69</del>	<del>93.12</del>	<del>159,370</del>	<del>193,690</del>
<del>Director of Information Technology</del>	<del>61</del>	<del>76.62</del>	<del>80.45</del>	<del>84.47</del>	<del>88.69</del>	<del>93.12</del>	<del>159,370</del>	<del>193,690</del>
Director of Operations	61	76.62	80.45	84.47	88.69	93.12	159,370	193,690
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General Manager	Contract					-	-	-
Human Resources Coordinator	33	38.37	40.29	42.30	44.42	46.64	79,810	97,011
<del>Human Resources &amp; Risk Manager</del>	<del>50</del>	<del>58.38</del>	<del>61.30</del>	<del>64.36</del>	<del>67.58</del>	<del>70.96</del>	<del>121,430</del>	<del>147,597</del>
<del>Human Resources Manager</del>	<del>40</del>	<del>45.62</del>	<del>47.90</del>	<del>50.29</del>	<del>52.80</del>	<del>55.44</del>	<del>94,890</del>	<del>115,315</del>
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Water Production Supervisor	47	54.21	56.92	59.77	62.76	65.90	112,757	137,072
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Water Utility Supervisor	44	50.36	52.88	55.52	58.30	61.21	104,749	127,317
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Water Utility Worker II	28	33.92	35.62	37.40	39.27	41.23	70,554	85,758

Board of Directors \$296.40 per day for meeting attendance in accordance with District rules and regulations

*\*\*Positions highlighted in grey are non-budget positions not intended to be filled in 2025*



# Beaumont-Cherry Valley Water District Salary Schedule by Classification

Effective: July 1, 2025 Classification	Salary Range*	Hourly rates (per step)					Annual Range (based on 2080 hrs.; rounded to nearest dollar)	
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Customer Service Representative I	20	27.85	29.24	30.70	32.23	33.84	57,928	70,387
Customer Service Representative II	25	31.50	33.08	34.73	36.47	38.29	65,520	79,643
Customer Service & Utility Billing Manager	46	52.88	55.52	58.30	61.22	64.28	109,990	133,702
Development Services Technician	22	29.25	30.71	32.25	33.86	35.55	60,840	73,944
Director of Engineering	62	78.52	82.45	86.57	90.90	95.44	163,322	198,515
Director of Finance and Administration	67	88.83	93.27	97.93	102.83	107.97	184,766	224,578
Director of Information Technology and Cybersecurity	61	76.62	80.45	84.47	88.69	93.12	159,370	193,690
Director of Operations	61	76.62	80.45	84.47	88.69	93.12	159,370	193,690
Engineering Assistant	37	42.36	44.48	46.70	49.04	51.49	88,109	107,099
Engineering Intern	4	18.76	19.70	20.69	21.72	22.81	39,021	47,445
Executive Assistant	43	49.11	51.57	54.15	56.86	59.70	102,149	124,176
Finance Manager	50	58.38	61.30	64.36	67.58	70.96	121,430	147,597
General Manager	Contract					132.53	-	275,662
Human Resources Coordinator	33	38.37	40.29	42.30	44.42	46.64	79,810	97,011
Human Resources & Risk Manager	50	58.38	61.30	64.36	67.58	70.96	121,430	147,597
Maintenance Technician I	24	30.73	32.27	33.88	35.57	37.35	63,918	77,688
Maintenance Technician II	28	33.92	35.62	37.40	39.27	41.23	70,554	85,758
Management Analyst I	31	36.53	38.36	40.28	42.29	44.40	75,982	92,352
Management Analyst II	38	43.42	45.59	47.87	50.26	52.77	90,314	109,762
Senior Civil Engineer	53	62.87	66.01	69.31	72.78	76.42	130,770	158,954
Senior Customer Service Rep	30	35.64	37.42	39.29	41.25	43.31	74,131	90,085
Senior Management Analyst	45	51.60	54.18	56.89	59.73	62.72	107,328	130,458
Senior Water Utility Worker	32	37.43	39.30	41.27	43.33	45.50	77,854	94,640
Water Production Operator I	28	33.92	35.62	37.40	39.27	41.23	70,554	85,758
Water Production Operator II	33	38.37	40.29	42.30	44.42	46.64	79,810	97,011
Water Production Supervisor	47	54.21	56.92	59.77	62.76	65.90	112,757	137,072
Water Utility Superintendent	51	59.85	62.84	65.98	69.28	72.74	124,488	151,299
Water Utility Supervisor	44	50.36	52.88	55.52	58.30	61.21	104,749	127,317
Water Utility Worker I	24	30.73	32.27	33.88	35.57	37.35	63,918	77,688
Water Utility Worker II	28	33.92	35.62	37.40	39.27	41.23	70,554	85,758

Board of Directors

\$296.40 per day for meeting attendance in accordance with District rules and regulations

*\*\*Positions highlighted in grey are non-budget positions not intended to be filled in 2025*



**Beaumont-Cherry Valley Water District  
Personnel Committee Meeting  
June 17, 2025**

**Item 10**

**STAFF REPORT**

**TO:** Personnel Committee

**FROM:** Sylvia Molina, Director of Finance and Administration

**SUBJECT:** Update: BCVWD 2026 Operational Budget Timeline

**Staff Recommendation**

No recommendation.

**Executive Summary**

Staff has prepared the 2026 Operational Budget timeline, which includes key dates that impact the Finance and Audit Committee, Personnel Committee, and the Board of Directors, reflected in Table 1.

**Background**

District policy requires the Board of Directors to approve the Operations budget for the new year by December 31<sup>st</sup> of the current year. Before the budget document can be presented to the Board of Directors for approval, several steps need to take place. There are over 200 tasks related to the mid-year review, budget kickoff, trainings, accomplishments and goals, personnel review, and internal discussions and meetings, including staff report deadlines to present the budget resolution to the full Board for approval.

Included in the list of tasks are important meeting dates that specifically relate to the Board, the Finance and Audit Committee, and the Personnel Committee. Table 1 presents the estimated schedule of future events of the operating budget. The timeline was presented to the Finance and Audit Committee on June 5, 2025 and to the Board of Directors on June 11, 2025.

Table 1 – Estimated operational budget meeting timeline

Date	Legislative Body	Topic(s)
06/17/2025	Personnel Meeting	Budget Timeline
07/02/2025	Finance and Audit Committee	2025 Mid-year budget update
07/09/2025	Board of Directors	2025 Mid-year budget update
09/01/2025	Board of Directors	Biography updates due to Admin. Assistant
09/04/2025	Finance and Audit Committee	Budget timeline update
09/16/2025	Personnel Committee	Discussion of new positions (if applicable)
10/02/2025	Finance and Audit Committee	Draft budget numbers



Date	Legislative Body	Topic(s)
10/16/2025	Finance and Audit Committee	Special Meeting to review budget document draft
10/21/2025	Personnel Committee	Discussion of new positions (if applicable)
11/06/2025	Finance and Audit Committee	Budget document review
11/12/2025	Board of Directors	Budget Workshop (presentation, draft document)
11/20/2025	Board of Directors	Budget document review
12/04/2025	Finance and Audit Committee	Budget document review
12/10/2025	Board of Directors	Budget submission for approval

### **Fiscal Impact**

To be determined.

Staff Report prepared by Sylvia Molina, Director of Finance and Administration