

## REGULAR BOARD MEETING AGENDA

5:30 PM Wednesday April 19, 2023  
UPUD Headquarters | 339 Main Street, Murphys, CA 95247

### OUR MISSION

*Union Public Utility District is dedicated to protecting, enhancing, and developing our water resources to the highest beneficial use for our customers, while maintaining cost-conscious, reliable service and providing gainful employment through responsible management.*

**Board Chambers are open to the public and the following alternative is available to members of the public who wish to participate in the meeting virtually:**

**To join the video meeting, click this [link](#):**

*Meeting ID: 542 628 9577*

*Passcode: 2ux9yC*

**To join by phone (audio only)**

**+1 669-900-9128; +1 346-24-7799 or +1 253-215-8782.**

*Meeting ID: 542 628 9577*

*Passcode: 754521*

In compliance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting, please contact the Administration Office at 209-728-3651. Notification in advance of the meeting will enable UPUD to make reasonable arrangements to ensure accessibility to this meeting. Any documents that are made available to the Board before or at the meeting, not privileged or otherwise protected from disclosure, and related to agenda items, will be made available at UPUD for review by the public.

### ORDER OF BUSINESS

- 1. CALL TO ORDER & THE PLEDGE OF ALLEGIANCE**
- 2. APPROVAL OF AGENDA**
- 3. PUBLIC COMMENT:**

(LIMIT 5 MINUTES PER PERSON) Members of the public may address the Board on items not agendized. The public is encouraged to contact the General Manager or Board of Directors for consideration of items to be placed on the agenda. No action will be taken by the Board unless an item is agendized.

**4. CONSENT AGENDA**

Consent agenda items are expected to be routine and non-controversial. They will be acted upon by the Board at a time, without discussion. Any board member, staff member or interested party may request removal of an item from the consent agenda for later discussion.

- a. Approval of Minutes: March 15, 2022 – Regular Meeting
- b. Approval of Minutes: March 30, 2022 – Special Meeting
- c. Expenditures- March 2023
- d. Fund Balance Report – March 2023
- e. Balance Sheet & Income Statement – March 2023
- f. YTD Budget to Actuals – March 2023

**5. PUBLIC HEARING:**

- a. Discussion/ Action regarding adoption of the Irrigation Account Review Policy  
(Jessica Self, General Manager) **ORD 2023-001**

**6. OLD BUSINESS:**

- a. Discussion/Action revising District Employee Policies  
(Jessica Self, General Manager) **RES 2023-002**

- 1. 2009 - Salary Schedule
- 2. 2020 - Vacation Policy
- 3. 2030 - Holiday Schedule
- 4. 2040 - Sick Leave Policy
- 5. 2110 – Employee Benefits
- 6. 2095 – Apprenticeship Program
- 7. 2090 – District Issued Uniforms and Annual Clothing Stipend
- 8. 2330, 2335, 2340, 2345, 2350 – Job Descriptions

- b. Discussion/Action regarding Disconnection Policy  
(Jessica Self, General Manager) **RES 2023-003**

**7. NEW BUSINESS:**

- a. Discussion/Action regarding Authorizing UPUD Representative for SWRCB Financial Assistance Application  
(Jessica Self, General Manager) **RES 2023-004**

- b. Discussion/Action regarding TStan-IRWM and ACWA Memberships  
(Jessica Self, General Manager)

- c. Discussion/Action regarding the formation of a Finance Committee  
(Jessica Self, General Manager)

- d. Discussion/Action regarding Renewal of Liability Insurance Policy with Cutler Segerstrom Insurance  
(Elaine Urruty, Clerk to the Board)

**8. REPORTS:**

- a. UWPA
- b. LAFCO
- c. GENERAL MANAGER

**9. DIRECTORS COMMENTS**

**10. CLOSED SESSION:**

- a. Conference with Legal Counsel – Anticipated Litigation – Significant Exposure to Litigation Pursuant to Government Code, §54956.9(d): One (1) matter
- b. Liability Claims – Government Code §54956.95  
Claimant: Michael Hatfield  
Agency Claimed Against: Union Public Utility District

**11. RETURN TO OPEN SESSION**

- a. Report on Closed Session

**12. NEXT BOARD MEETINGS**

- Wednesday, May 17, 2023, at 5:30 PM – Regular Meeting
- Wednesday, June 15, 2023, at 5:30 PM - Regular Meeting

**13. ADJOURNMENT**

**UNION PUBLIC UTILITY DISTRICT  
339 MAIN STREET  
MURPHYS, CA 95247**

**MINUTES OF MARCH 15, 2023 REGULAR MEETING**

The Board of Directors of the Union Public Utility District met in Regular Session at the UPUD Office in Murphys, California, at approximately 5:30 PM.

Directors Present:	ERIC BOTTOMLEY	President
	GREG RASMUSSEN	Vice President
	RALPH CHICK	Director
	BRUCE TALLAKSON	Treasurer
Directors Absent:	TOM QUINCY	Secretary
Also Present:	JESSICA SELF	General Manager
	ELAINE URRUTY	Admin Asst/Clerk to Board
	BARBARA BRENNER	District Legal Counsel
	JOEL METZGER	UWPA General Manager
	PUBLIC AT LARGE	

1. PLEDGE OF ALLEGIANCE: The Pledge was given.

2. APPROVAL OF AGENDA:

Motion:	Director Tallakson
Second:	Director Chick
Ayes:	Directors Bottomley, Rasmussen, Tallakson, and Chick
Nays:	None
Absent:	Director Quincy
Abstain:	None

MINUTE ENTRY. MOTION TO APPROVE THE AGENDA AS PRESENTED.

3. PUBLIC COMMENT: Mike Peirano asked if smart meters are in the CIP and can be put on irrigation services and if they would be purchased from a reputable agency. General Manager, Jessica Self, said that smart meters are in the CIP for irrigation services and can be put on irrigation services. However, projects in the CIP are a plan, not a promise, and the CIP can change based on priorities. The General Manager did state that our goal would be to move all services to smart meters and that the District would go out to bid and purchase from a reputable manufacturer of smart meters. Mr. Peirano also asked who the District Engineer is, Director Quincy reported that the District's engineer is Matt Ospital of Weber, Ghio and Associates. Mr. Peirano asked if the District has a primary contractor's list for emergencies. The General Manager said she would check our Emergency Action Plan and get back to him on this.

Joel Metzger, General Manager of UWPA, reported that UWPA has always invested with LAIF at a fairly low rate, and he believes UPUD does the same. Mr. Metzger said it has come to his attention that City of Angels has recently moved funds over to the Bank of Stockton and they are obtaining a rate of approximately 4%. Joel says that he plans to bring this item to his Board and request moving funds to the Bank of Stockton and hopes to get a 4.25% interest rate. This could be a significant gain in interest earnings. Joel wanted to bring this item to the UPUD Board's attention and said he will get more information to UPUD's General Manager.

Jim Saunders recommended that the District go back to minimums because if the District doesn't use up its water, the state is going to take it away from them. Mr. Saunders also recommended that the District not sell the garage property, as property in Murphys is hard to obtain and you don't know who might move in. Mr. Saunders asked if the District went to smart meters, what will the crew that read meters be doing with their time? Director Chick noted that there are a lot of other jobs that can be worked on by the time freed up when we get smart meters, and they still need to be maintained and serviced. Discussion ensued regarding the pros and cons of smart meters and the General Manager said that when the District gets ready to investigate smart meters, she would be happy to put this item on the agenda for an informational presentation.

### **CONSENT AGENDA**

#### **4. CONSENT AGENDA:**

- a. Minutes - February 15, 2023 – Regular Meeting
- b. Expenditures – February 2023
- c. Fund Balance Report – February 2023
- d. Balance Sheet & Income Statement – February 2023
- e. YTD Budget to Actuals – February 2023

Motion: Director Chick  
Second: Director Rasmussen  
Ayes: Directors Bottomley, Rasmussen, Tallakson, and Chick  
Nays: None  
Absent: Director Quincy  
Abstain: None

MINUTE ENTRY. MOTION TO APPROVE THE CONSENT AGENDA AS PRESENTED.

### **REGULAR AGENDA**

#### **OLD BUSINESS:**

- 5. There was no Old Business.

#### **NEW BUSINESS:**

- 6.a DISTRICT POSITION ON BALLOT INITIATIVE 21-0042A1 TAXPAYER PROTECTION & GOVERNMENT ACCOUNTABILITY ACT; DISCUSSION/POSSIBLE ACTION

A copy of Resolution #2023-01 and the General Manager's report on this item with staff recommendation were included in the agenda packet for review. General Manager, Jessica Self, gave a PowerPoint presentation on the ballot initiative.

- Motion: Director Chick
- Second: Director Tallakson
- Ayes: Directors Bottomley, Rasmussen, Tallakson, and Chick
- Nays: None
- Absent: Director Quincy
- Abstain: None

RES. #2023-01. TO APPROVE RESOLUTION #2023-01 OPPOSING BALLOT INITIATIVE 21-0042A1: TAXPAYER PROTETION & GOVERNMENT ACCOUNTABILITY ACT.

- 6.b DISTRICT POSITION ON ASSEMBLY BILL AB 338, PREVAILING WAGE FOR FUELS MANAGEMENT; DISCUSSION/POSSIBLE ACTION A copy of the General Manager's report on this item including staff recommendation was included in the agenda packet for review. The General Manager reviewed Assembly Bill AB 338 and potential impacts.

- Motion: Director Rasmussen
- Second: Director Chick
- Ayes: Directors Bottomley, Rasmussen, Tallakson, and Chick
- Nays: None
- Absent: Director Quincy
- Abstain: None

MINUTE ENTRY TO APPROVE TAKING A 'OPPOSE' POSITION ON AB 338 (AGUILAR-CURRY) PREVAILING WAGE FOR FUELS MANAGEMENT.

- 6.c PROPOSED MUTAL ASSISTANCE AGREEMENT BETWEEN UNION PUBLIC UTILITY DISTRICT (UPUD) AND UTICA WATER AND POWER AUTHORITY (UWPA); DISUCSSION/POSSIBLE ACTION A copy of the General Manager's report on this item including staff recommendation was included in the agenda packet for review. The General Manager reviewed the Mutual Assistance Agreement with the Board.

- Motion: Director Tallakson
- Second: Director Rasmussen
- Ayes: Directors Bottomley, Rasmussen, Tallakson, and Chick
- Nays: None
- Absent: Director Quincy
- Abstain: None

MINUTE ENTRY. TO THE MUITUAL ASSISTANCE AGREEMENT (MAA) BETWEEN UNION PUBLIC UTILITY DISTRICT (UPUD) AND UTICA WATER AND POWER AUTHORITY (UWPA).

- 6.d DRAFT IRRIGATION ACCOUNT REVIEW POLICY; DISCUSSION A copy of the General Manager's report on this item including staff recommendation was included in the agenda packet for review. The General Manager reviewed the proposed new policy with the Board and asked for any input or recommendations from the Board or public. Discussion ensued regarding the proposed policy. The policy notice will be posted in the newspaper and the final draft will be brought back to the Board at the April meeting for Public Hearing and review for approval.

At this time President Bottomley moved to Reports.

## REPORTS:

### 9.a UWPA REPORT.

Joel Metzger reported that UWPA had submitted paperwork today for a \$1.3M grant to CalFire that will fund a project that will protect their wooden flumes from Darby Russel Road to Sunrise Point in Hathaway Pines. If successful, this will be a 100% grant funded project. Joel noted he did not have to write this grant as he now has a team in place to write the grant and he only had to review and approve the application. Joel also reported that the CEQA is being prepared on the \$1.2M CalFire grant project and should be done by June. This is also a 100% grant funded project and UWPA is getting 12% administration costs through this grant. This grant will clear 220 acres around Hunter's Reservoir.

Joel also reported that he went to Washington DC and met with Federal Energy and Regulatory Commission staff and had some very positive conversations regarding long term planning and discussed costs and available options for Utica. Joel said he also made some very good connections with funding agencies at the Federal level. There is funding available through Congressionally directed spending requests, which is a funding opportunity that we have been missing out on as small agencies. These funds are submitted by our senators to the agencies and recommend them.

Joel said that budget development has kicked off today for UWPA and will be meeting with Jessica later this week. It looks like we will be in a water year one with record snowpack and therefore should have a very good power generation year which results in more revenue.

Director Rasmussen said that Joel did some really good work back in Washington DC and this was a huge accomplishment for UWPA.

Next UWPA meeting is scheduled for Tuesday, March 28, 2023, at 5:30 PM at the UWPA office in Angels Camp.

### 9.b LAFCO REPORT. There was nothing new to report.

The next LAFCO meeting is scheduled for Monday, March 20, 2023, at 6:00 PM at the Calaveras County Board of Supervisors Chambers in San Andreas.

### 9.c GENERAL MANAGER'S REPORT. A copy of the General Manager's Report was provided to the Board and the General Manager reviewed the report with the Board. General Manager, Jessica Self, said she is excited about the information Joel was able to gather in Washington

DC and looks forward to working together to get grant funding for our agencies. The General Manager informed the Board that she plans to start working on planning a premiere showing of our water system in the Murphy's area. She would like to have the event in the first week of May.

The General Manager reported that the District received a Class Action Claim yesterday from Michael Hatfield's attorney and tonight from Mr. Hatfield. The General Manager provided copies to the Board, noting that this item cannot be discussed until agendaized.

10. DIRECTORS COMMENTS. Director Chick noted that during the storms he received inquiries as to why we had hydrants open and running water. Director Chick said we may want to put something on our website in the future to inform customers why we are doing this.

**ADJOURN TO CLOSED SESSION:** The meeting was adjourned to Closed Session at 6:36 PM.

- 7.a CONFERENCE WITH LEGAL COUNSEL – ANTICIPATED LITIGATION PURSUANT TO GOVERNMENT CODE SECTION 54956.9(d)(2) (ONE CASE – SIGNIFICANT EXPOSURE TO LITIGATION)

**RECONVENE TO OPEN SESSION:** The meeting reconvened to open session at 7:08 PM.

8. REPORT ON CLOSED SESSION ITEMS: There was nothing to report.
11. NEXT MEETINGS:
- Wednesday, April 19, 2023, at 5:30 PM – Regular Meeting
  - Wednesday, May 17, 2023, at 5:30 PM – Regular Meeting
12. ADJOURNMENT: The meeting was adjourned with no further business at 7:10 PM.

Submitted by: \_\_\_\_\_  
Thomas E. Quincy, Secretary

Date: \_\_\_\_\_

ATTEST:

\_\_\_\_\_  
Elaine M. Urruty  
Clerk to the UPUD Board of Directors



**UNION PUBLIC UTILITY DISTRICT  
339 MAIN STREET  
MURPHYS, CA 95247**

**MINUTES OF MARCH 30, 2023 SPECIAL MEETING**

The Board of Directors of the Union Public Utility District met in Regular Session at the UPUD Office in Murphys, California, at approximately 3:00 PM.

Directors Present:	ERIC BOTTOMLEY TOM QUINCY BRUCE TALLAKSON RALPH CHICK	President Secretary Treasurer Director
Directors Absent:	GREG RASMUSSEN	Vice President
Also Present:	JESSICA SELF ELAINE URRUTY LISA BIEDINGER CHRISTINA PRITCHARD MATT OSPITAL PUBLIC AT LARGE	General Manager Admin Asst/Clerk to Board Customer Service Clerk District Legal Counsel District Engineer

1. PLEDGE OF ALLEGIANCE: The Pledge was given.

2. APPROVAL OF AGENDA:

Motion:	Director Chick
Second:	Director Quincy
Ayes:	Directors Bottomley, Quincy, Tallakson and Chick
Nays:	None
Absent:	Director Rasmussen
Abstain:	None

MINUTE ENTRY. MOTION TO APPROVE THE AGENDA AS PRESENTED.

3. PUBLIC COMMENT: There was no public comment.

**ADJOURN TO CLOSED SESSION:** The meeting was adjourned into Closed Session at 3:03 PM.

4.a CONFERENCE WITH LEGAL COUNSEL – ANTICIPATED LITIGATION PURSUANT TO GOVERNMENT CODE SECTION 54956.9(d)(2) (ONE CASE – SIGNIFICANT EXPOSURE TO LITIGATION)

**RECONVENE TO OPEN SESSION:** The meeting reconvened to open session at 3:28 PM.

5. REPORT ON CLOSED SESSION ITEMS: There was nothing to report from closed session.

The public was asked if there were any comments and Noah Glanville asked to speak. Mr. Glanville reviewed the process he had gone through when applying for water service in September 2022. In addition, Mr. Glanville and the Board discussed the history of the water service provided in relation to his current residential property. The Board provided Mr. Glanville with two options for water service.

6. DIRECTORS COMMENTS: There were no Director comments.

7. NEXT BOARD MEETINGS:

- Wednesday, April 19, 2023, at 5:30 PM – Regular Meeting
- Wednesday, May 17, 2023, at 5:30 PM – Regular Meeting

8. ADJOURNMENT. The meeting was adjourned with no further business at 4:47 PM.

Submitted by: \_\_\_\_\_  
Thomas E. Quincy, Secretary

Date: \_\_\_\_\_

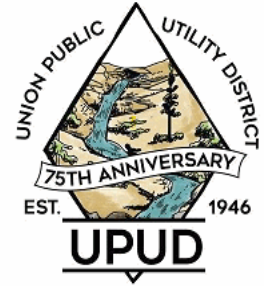
ATTEST:

\_\_\_\_\_  
Elaine M. Urruty  
Clerk to the UPUD Board of Directors

# Bank Reconciliation

## Checks by Date

User: eurruty@upudwater.org  
 Printed: 04/14/2023 - 12:18PM  
 Cleared and Not Cleared Checks  
 Print Void Checks



Check No	Check Date	Name	Comment	Module	Void	Clear Date	Amount
0	3/3/2023	CalPERS		AP			3,339.41
0	3/3/2023	EDD		AP			1,201.51
0	3/3/2023	Employment Development Dept		AP			216.08
0	3/3/2023	United States Treasury		AP			6,760.49
0	3/3/2023		DD 00601.03.2023	PR			3,963.18
27942-27947	3/3/2023	Payroll		PR			1,690.66
27943	3/3/2023	William Eltringham		PR			3,275.27
27944	3/3/2023	Jason Eltringham		PR			2,990.85
27945	3/3/2023	Jenna Mayo		PR			522.37
27946	3/3/2023	Troy Mumm		PR			2,587.19
27947	3/3/2023	Elaine Urruty		PR			2,179.62
27948	3/3/2023	Alpha Analytical Laboratories, Inc.		AP			882.00
27949	3/3/2023	AT&T U-verse		AP			167.39
27950	3/3/2023	AWWA		AP			106.00
27951	3/3/2023	Calaveras Lumber		AP			37.69
27952	3/3/2023	Carbon Copy		AP			36.08
27953	3/3/2023	Clark Pest Control		AP			196.00
27954	3/3/2023	Comcast Business		AP			299.74
27955	3/3/2023	Coneth Solutions, Inc		AP			450.00
27956	3/3/2023	CRWA		AP			900.00
27957	3/3/2023	Dataprose, LLC		AP			1,147.00
27958	3/3/2023	De Lage Landen Financial Services, Inc.		AP			270.32
27959	3/3/2023	Employee Relations, Inc		AP			368.38
27960	3/3/2023	Farmer's Insurance Exchange		AP			1,382.58
27961	3/3/2023	Ferguson Waterworks #1423		AP			268.32
27962	3/3/2023	Frontier Auto Supply		AP			212.25
27963	3/3/2023	Sanders Snow Removal		AP			600.00
27964	3/3/2023	USA Vision		AP			127.20
27965	3/3/2023	Verizon Wireless		AP			339.21
27966	3/3/2023	Weber, Ghio & Associates		AP			1,311.00
27967	3/3/2023	White Brenner, LLP		AP			3,669.16
27968	3/10/2023	AT&T CALNET		AP			272.93
27969	3/10/2023	California Waste Recovery System		AP			179.08
27970	3/10/2023	CPPA		AP			4,619.20
27971	3/10/2023	Hunt & Sons, Inc		AP			2,152.65
27972	3/10/2023	Mother Lode Answering Service, Inc.		AP			242.00
27973	3/10/2023	Murphys Sanitary District		AP			120.00
27974	3/10/2023	Northern Tool & Equipment		AP			11.60
27975	3/10/2023	Red Store		AP			171.12
27976	3/10/2023	Sanders Snow Removal		AP			150.00
27977	3/10/2023	Sierra Hills Market		AP			36.12
27978	3/10/2023	Springbrook Holding Company, LLC.		AP			511.00
27979	3/10/2023	Union Bank		AP			2,210.23
0	3/17/2023	CalPERS		AP			3,418.96
0	3/17/2023	EDD		AP			1,220.53
0	3/17/2023	Employment Development Dept		AP			221.85

Check No	Check Date	Name	Comment	Module	Void	Clear Date	Amount
0	3/17/2023	United States Treasury		AP			6,913.03
0	3/17/2023		DD 00602.03.2023	PR			7,768.72
27980	3/17/2023	Lisa Biedinger		PR			1,690.66
27981	3/17/2023	Jason Eltringham		PR			2,968.72
27982	3/17/2023	Jenna Mayo		PR			680.82
27983	3/17/2023	Troy Mumm		PR			2,394.68
27984	3/17/2023	Elaine Urruty		PR			2,179.62
0	3/21/2023	CalPERS - Health Benefits		AP			16,616.30
27985	3/21/2023	Anthem Blue Cross		AP			1,037.00
27986	3/21/2023	AT&T U-verse		AP			167.39
27987	3/21/2023	Comcast		AP			160.24
27988	3/21/2023	Coneth Solutions, Inc		AP			1,455.00
27989	3/21/2023	Digital Deployment, Inc.		AP			200.00
27990	3/21/2023	Farmer's Insurance Exchange		AP			1,384.58
27991	3/21/2023	Gateway Press, Inc		AP			224.69
27992	3/21/2023	Hildebrand Consulting, LLC		AP			1,840.00
27993	3/21/2023	PG&E		AP			880.86
27994	3/21/2023	Thatcher Company, Inc		AP			4,249.95
27995	3/21/2023	The Phone Store & More Inc		AP			3,877.18
27996	3/21/2023	USA Vision		AP			165.44
27997	3/21/2023	White Brenner, LLP		AP			2,502.03
0	3/31/2023	CalPERS		AP			3,636.60
0	3/31/2023	EDD		AP			1,285.05
0	3/31/2023	Employment Development Dept		AP			233.53
0	3/31/2023	United States Treasury		AP			7,259.62
0	3/31/2023		DD 00603.03.2023	PR			8,793.23
28000	3/31/2023	Lisa Biedinger		PR			1,426.22
28001	3/31/2023	Jason Eltringham		PR			2,836.74
28002	3/31/2023	Jenna Mayo		PR			744.93
28003	3/31/2023	Troy Mumm		PR			2,573.43
28004	3/31/2023	Elaine Urruty		PR			2,179.62
28005	3/31/2023	Angels Sewer and Drain, Inc		AP			2,500.00
28006	3/31/2023	Comcast Business		AP			271.73
28007	3/31/2023	Haidlen Ford		AP			46,045.57
28008	3/31/2023	Verizon Wireless		AP			339.21
Total Void Check Count:							0
Total Void Check Amount:							
Total Valid Check Count:							81
Total Valid Check Amount:							196,516.61
Total Check Count:							81

Check No	Check Date	Name	Comment	Module	Void	Clear Date	Amount
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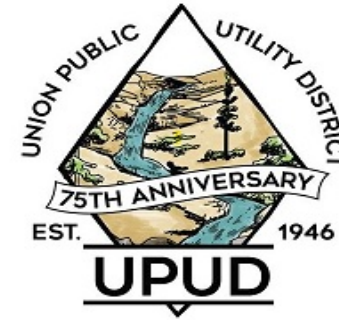
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Total Check Amount:

196,516.61

# General Ledger Fund Balance Report

User: eurruty@upudwater.org  
 Printed: 4/12/2023 4:23:56 PM  
 Period 09 - 09  
 Fiscal Year 2023

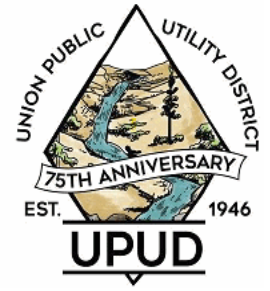


<u>Account Number</u>	<u>Description</u>	<u>Beg Bal</u>	<u>Debits</u>	<u>Credits</u>	<u>End Bal</u>
<b>01</b>	<b>Water Fund</b>				
01-00-1400	LAIF Account	61,446.43	0.00	0.00	61,446.43
01-00-1401	LAIF-Surplus Fund	716,107.66	0.00	0.00	716,107.66
01-00-1402	LAIF-Irrigation Imprvmnt Fund	164,546.65	0.00	0.00	164,546.65
01-00-1404	LAIF-UWPA Reserve Fund	202,279.79	0.00	0.00	202,279.79
01-00-1405	LAIF-Reserve Fund	881,649.50	0.00	0.00	881,649.50
01-00-1406	LAIF-Capital Imprvmnt Fund	188,517.32	0.00	0.00	188,517.32
01-00-1407	LAIF-SRLF Rec (Conn Fees)	614,491.68	0.00	0.00	614,491.68
<b>01</b>	<b>Water Fund</b>	<b>2,829,039.03</b>	<b>0.00</b>	<b>0.00</b>	<b>2,829,039.03</b>
<b>Asset Total</b>		<u>2,829,039.03</u>	<u>0.00</u>	<u>0.00</u>	<u>2,829,039.03</u>
		_____	_____	_____	_____

# General Ledger

## Balance Sheet

User: curruty@upudwater.org  
 Printed: 04/12/2023 - 4:29PM  
 Fund: All  
 Period: 9  
 Fiscal Year: 2023



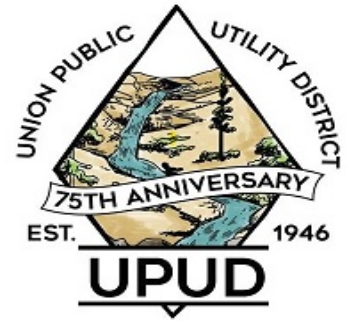
### Fund ALFRE

Account Type	Amount
<b>01 - Water Fund</b>	
Assets	
Cash & Investments	3,149,779.80
Accounts Receivable	153,914.84
Inventory	0.00
Fixed Assets	4,791,944.41
Other Long Term Assets	0.00
CalPERS Pension Outflows	95,708.00
Grant Receivable	0.00
Total Assets:	8,191,347.05
Liabilities	
Accounts Payable	16.40
Payroll Liabilities	49,637.31
Deferred Revenue	2,462.32
Compensated Absences	71,607.73
Bonds/Notes Payable-Current	0.00
CalPERS Pension -Liability Exp	153,412.00
CalPERS Pension - Inflows	154,547.00
Total Liabilities:	431,682.76
Fund Balance	
Fund Balance	7,806,137.26
Total Fund Balance:	7,806,137.26
Total Liabilities and Fund Balance:	8,237,820.02
Total Retained Earnings:	(46,472.97)
Total Fund Balance and Retained Earnings:	7,759,664.29
Total Liabilities, Fund Balance, and Retained Earnings:	8,191,347.05
Totals for Fund 01 - Water Fund:	0.00

# General Ledger

## Revenues by Category

User: eurruty@upudwater.org  
 Printed: 4/12/2023 4:32:32 PM  
 Period 01 - 09  
 Fiscal Year 2023



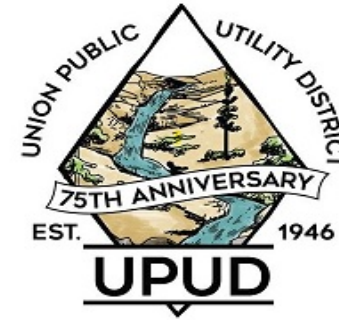
Account Number	Description	One Year Prior Actual	Budget	Period Amt	End Bal
<b>01</b>	<b>Water Fund</b>				
01-01-4100	Domestic Water Revenue	-1,395,408.99	-2,090,000.00	-144,615.00	-1,372,975.26
01-01-4105	Irrigation Water Revenue	-76,665.51	-190,000.00	-10,395.68	-85,259.11
01-01-4120	Hydrant Meter Revenue	-2,320.54	-15,000.00	0.00	-1,381.40
01-01-4160	Penalties	0.00	-2,500.00	-2,170.00	-18,280.00
01-01-4180	Other - Water Related	-3,243.41	-12,500.00	-746.76	-4,557.73
01-01-4189	Meter Reset Fees	0.00	-1,000.00	-1,000.00	-1,000.00
01-01-4190	Meter Connection Fees	-315,000.00	-98,000.00	-14,000.00	-84,000.00
01-01-4195	Non-Operating Income	0.00	-7,100.00	0.00	0.00
01-01-4200	Interest Earned	-4,428.77	-11,000.00	0.00	-23,036.14
01-01-4300	County Taxes	-89,266.96	-155,000.00	0.00	-80,264.51
01-01-4420	Insurance Refund	0.00	0.00	-11,142.05	-11,142.05
01-01-4440	Garage Rental Revenue	-900.00	-1,200.00	0.00	-700.00
01-01-4441	NCPA Facilities Use Agreement	-2,500.00	-2,500.00	0.00	-2,500.00
01-01-4460	Grant Income	0.00	-1,377,000.00	0.00	-38,500.00
<b>01</b>	<b>Water Fund</b>	<b>-1,889,734.18</b>	<b>-3,962,800.00</b>	<b>-184,069.49</b>	<b>-1,723,596.20</b>
<b>Revenue Total</b>		<b><u>-1,889,734.18</u></b>	<b><u>-3,962,800.00</u></b>	<b><u>-184,069.49</u></b>	<b><u>-1,723,596.20</u></b>



# General Ledger

## YTD Budget to Actuals

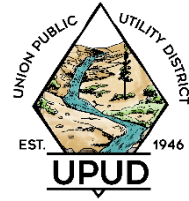
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 Period 01 - 09  
 Fiscal Year 2023



Account Number	Description	2022 Actual	YTD Budget	Period Amt	End Bal	YTD Bgt Var	YTD Bgt % Var
01-03-6100	Labor	53,743.80	62,992.91	8,749.40	58,355.98	4,636.93	7.36
01-03-6101	Sick Pay	1,200.88	0.00	155.20	528.40	-528.40	0.00
01-03-6102	Vacation Pay	5,200.16	0.00	407.40	6,318.57	-6,318.57	0.00
01-03-6103	Overtime	1,653.83	3,192.00	0.00	2,301.84	890.16	27.89
01-03-6104	On Call Pay	13,200.00	13,500.00	2,040.00	13,860.00	-360.00	-2.67
01-03-6110	FICA 7.65%	5,737.30	6,375.00	868.43	6,224.43	150.57	2.36
01-03-6300	Health Insurance	26,555.62	30,101.25	6,984.01	43,132.72	-13,031.47	-43.29
01-03-6400	CalPERS PR Expense	15,547.93	15,000.00	1,436.44	15,140.82	-140.82	-0.94
01-04-6100	Labor	159,762.41	182,874.75	22,421.26	160,587.89	22,286.86	12.19
01-04-6101	Sick Pay	3,020.49	0.00	1,295.06	8,383.87	-8,383.87	0.00
01-04-6102	Vacation Pay	10,048.25	0.00	1,034.88	11,974.95	-11,974.95	0.00
01-04-6103	Overtime	1,920.35	2,250.00	1,165.43	6,872.72	-4,622.72	-205.45
01-04-6104	On Call Pay	7,950.00	8,250.00	1,530.00	8,670.00	-420.00	-5.09
01-04-6110	FICA	14,136.63	18,000.00	2,099.65	15,031.47	2,968.53	16.49
01-04-6301	Worker's Compensation	6,808.70	7,875.00	1,328.25	5,450.59	2,424.41	30.79
01-04-6400	CalPERS PR Expense	35,390.81	36,000.00	3,521.87	36,442.26	-442.26	-1.23
01-05-6100	Labor	40,097.61	0.00	0.00	0.00	0.00	0.00
01-05-6101	Sick Pay	927.18	0.00	0.00	0.00	0.00	0.00
01-05-6102	Vacation Pay	3,087.58	0.00	0.00	0.00	0.00	0.00
01-05-6110	FICA	4,015.49	0.00	0.00	0.00	0.00	0.00
01-05-6300	Health Insurance	6,517.80	0.00	0.00	0.00	0.00	0.00
01-05-6400	CalPERS PR Expense	10,741.93	0.00	0.00	0.00	0.00	0.00
01-06-6100	Labor	61,652.49	221,250.00	32,176.43	188,437.43	32,812.57	14.83
01-06-6101	Sick Pay	1,276.30	0.00	128.00	4,427.79	-4,427.79	0.00
01-06-6102	Vacation Pay	4,249.66	0.00	2,632.38	20,136.20	-20,136.20	0.00
01-06-6103	Overtime	10,144.12	3,375.00	0.00	2,181.34	1,193.66	35.37
01-06-6110	FICA	5,915.19	18,000.00	2,739.37	17,014.33	985.67	5.48
01-06-6300	Health Insurance	22,534.06	60,450.00	10,931.16	67,364.80	-6,914.80	-11.44
01-06-6304	Health Benefits Adm Fee	0.00	0.00	54.65	205.15	-205.15	0.00
01-06-6400	CalPERS PR Expense	15,623.00	24,000.00	3,879.99	46,637.33	-22,637.33	-94.32
<b>Revenue Total</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0</b>
<b>Expense Total</b>		<b>548,659.57</b>	<b>713,485.91</b>	<b>107,579.26</b>	<b>745,680.88</b>	<b>-32,194.97</b>	<b>-0.0451</b>
<b>Grand Total</b>		<b>-548,659.57</b>	<b>-713,485.91</b>	<b>-107,579.26</b>	<b>-745,680.88</b>	<b>32,194.97</b>	<b>0.0451</b>

<b>Account Number</b>	<b>Description</b>	<b>2022 Actual</b>	<b>YTD Budget</b>	<b>Period Amt</b>	<b>End Bal</b>	<b>YTD Bgt Var</b>	<b>YTD Bgt % Var</b>
01	Water Fund	548,659.57	713,485.91	107,579.26	745,680.88	-32,194.97	-4.51
<b>Revenue Total</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0</b>
<b>Expense Total</b>		<b>548,659.57</b>	<b>713,485.91</b>	<b>107,579.26</b>	<b>745,680.88</b>	<b>-32,194.97</b>	<b>-0.0451</b>
<b>Grand Total</b>		<b>-548,659.57</b>	<b>-713,485.91</b>	<b>-107,579.26</b>	<b>-745,680.88</b>	<b>32,194.97</b>	<b>0.0451</b>

# Agenda Item



**DATE:** April 19, 2023

**TO:** UPUD Board of Directors

**FROM:** Jessica Self, General Manager

**SUBJECT:** Discussion/Action regarding the Adoption of the Irrigation Account Review Policy

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## **RECOMMENDED ACTION:**

Motion: \_\_\_\_\_ / \_\_\_\_\_ Adopting Ordinance No. 2023-001 Irrigation Account Review Policy.

## **SUMMARY:**

As of January 2023, UPUD's irrigation base rates have increased. As a result, irrigation customers have requested to have their meter downsized appropriately based on their actual water usage. However, there is no policy in place for staff to accommodate these requests.

Staff have worked closely with the Board and UPUD's District Engineer to identify rules and policies that will provide irrigation account holders flexibility and allow them to more cost effectively manage their water consumption and system operation.

Staff presented a draft Irrigation Account Review Policy at the March 15, 2023, Board meeting, and gathered input and comments from Board Directors. Staff updated the policy to address the Board's alterations and additional input.

## **Next Steps:**

Staff have finalized the Irrigation Account Review Policy and the ordinance is ready for adoption by the board.

A notice was published on March 23, 2023, and March 30, 2023, in the local newspapers to alert the public that a new ordinance may be adopted during the April 19, 2023, board meeting. Once adopted, a copy of the ordinance must be published in the local newspapers within 10 days of adoption.

If the board adopts the ordinance, there is a 60-day timeframe prescribed by Government Code Section 66017 prior to the new commercial account policy going into effect. If adopted on April 19, 2023, the new Commercial Account Policy will take effect on June 18, 2023.

**FINANCIAL CONSIDERATIONS:**

Irrigation account holders will be responsible for a minimum administrative review fee of \$330, which varies by connection. The irrigation account holder is also responsible for additional construction costs incurred by UPUD in association with actions taken by this policy.

*Attachments: Ordinance No. 2023-001 Irrigation Account Review Policy  
FINAL Irrigation Account Review Policy*

**ORDINANCE NO. 2023-001**

**AN ORDINANCE OF THE BOARD OF DIRECTORS OF THE  
UNION PUBLIC UTILITY DISTRICT  
IRRIGATION ACCOUNT REVIEW**

**WHEREAS**, The Board of Directors of the Union Public Utility District has determined that a policy pertaining to irrigation customers requesting a review of their account(s) should be created; and

**WHEREAS**, the Board of Directors published a notification and provided for a public hearing, in compliance with Government Code Sections 66013 and 66016, to receive comments regarding changes to Ordinance 98-06; and

**NOW, THEREFORE, BE IT ORDAINED** by the Board of Directors of the UNION PUBLIC UTILITY DISTRICT as follows:

**Section 1.** The attached Irrigation Account Review will become District Policy hereto and made a part of; and

**Section 2. Effect on prior actions.** All provisions of prior ordinances and resolutions of UPUD not inconsistent with this Ordinance will remain in full force and effect.

**Section 3. Severability.** This Ordinance and the various sections thereof are hereby declared to be severable. To the extent the terms and provisions of this Ordinance are in conflict or are otherwise inconsistent with the terms and provisions of any prior District ordinances, resolutions, rules, and other actions, the terms and provisions of this Ordinance shall prevail with respect thereto.

**Section 4. Publication/Effective Date.** Within ten (10) days of adoption, this Ordinance will be published in a newspaper of general circulation within Calaveras County. To allow for the 60-day timeframe prescribed by Government Code Section 66017, the new fees adopted by this Ordinance shall take effect on June 18, 2023.

**PASSED, APPROVED, AND ADOPTED** this 19<sup>th</sup> day of April, 2023.

AYES:

NOES:

ABSENT:

ABSTAIN:

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Eric Bottomley, President  
Union Public Utility District

I hereby certify that the within and foregoing is a full, true, and correct copy of the Resolution which was duly passed and adopted at a regular meeting of the Board of Directors of the Union Public Utility District on the 15<sup>th</sup> day of March 2023.

---

Elaine M Urruty  
Clerk to the Board

# IRRIGATION ACCOUNT REVIEW

The following applies to all sections within the Irrigation Account Review.

1. A minimum administrative review fee of \$330, which varies by connection, is required when applying for a review of an irrigation account.
2. Any construction costs incurred by UPUD in association with actions taken will be billed separately to the irrigation account holder.
3. Monthly billing will continue until all requirements and payments are met. Final billing will be sent through the date of completion.
4. Any loss of capacity resulting from adjustments will be forfeited.
5. In no circumstances will the capacity fees for a particular irrigation connection be refunded.
6. The General Manager has authority to approve or deny requests for review.

## WATER METERS

### 1. **Minimum meter size**

Each agriculture account will, at a minimum, be charged a connection fee for one 3/4-inch size meter. The account will be charged a corresponding monthly base rate service charge for the corresponding meter size.

### 2. **Irrigation customers can request a review of meter size.**

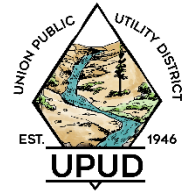
Irrigation customers can request a review of their accounts to reevaluate the water meter size if the meter is larger than 3/4-inch. The following is required upon the review:

- A. Adjustments will only occur after a full two years from the initial water service account activation. All irrigation accounts can request a review of their account every two years from the completion date of their last review.
- B. An assessment will be made to determine the appropriate meter size based on water use over the past 2 years and any other determining factors.
- C. For UPUD to review the account, the property owner must provide all necessary documentation for review by UPUD's District Engineer.

### 3. **Aging meters are replaced by UPUD and sized appropriately.**

If an irrigation meter has been determined by UPUD staff as reaching its end useful life, the meter will be replaced by UPUD at no additional cost to the property owner. In addition, UPUD will conduct a two-year review of water usage to determine the appropriate meter size and corresponding upgrades or alterations in infrastructure.

# Agenda Item



**DATE:** April 19, 2023

**TO:** UPUD Board of Directors

**FROM:** Jessica Self, General Manager

**SUBJECT:** Discussion/Action Revising and Replacing District Employee Policies

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## **RECOMMENDED ACTION:**

Motion: \_\_\_\_\_ / \_\_\_\_\_ adopting Resolution No. 2023-002 Employee policies revising 2030 - Holiday Schedule, 2040 - Sick Leave Policy, 2020 - Vacation Policy, 2009 – Salary Schedule, 2110- Employee Benefits, and the Customer Service Representative job description - 2330; and

Creating policies 2095 – Apprenticeship Program, 2090 District Issued Uniforms & Annual Clothing Stipend, and the job descriptions for: Administrative Analyst – 2335, Clerk / Administrative Assistant – 2340, Operations Manager – 2345, Water Distribution / Treatment Operator – 2350.

## **SUMMARY:**

UPUD staff are in the process of drafting updates to the District's employee policies. A completely updated and revised Employee Policy Handbook will be brought before the Board for consideration in the near future. Accordingly, staff prioritized specific sections and are recommending Board approval at this time. The previous General Manager presented these proposed updates to the board in October of 2022. Since then, staff have made minor changes to the previous General Managers draft of updates and will discuss these updates with the Board prior to making a motion for approval.

Recently, all staff reviewed these policies and provided feedback that has been addressed or incorporated in the attached proposed policies. Staff also conducted salary surveys of like agencies to assure UPUD's job titles, position descriptions, salaries and benefits are inline with neighboring agencies. The agencies surveyed included: City of Angels, Utica Water and Power Authority, Calaveras Public Utility District, Calaveras County Water District, Blue Lake Springs Municipal Water Company, and Tuolumne Utility District.

Following are the policies that are currently before the Board for updates:

<u>Policy Name</u>	<u>Number</u>
Salary Schedule	2009
Holiday Schedule	2030
Sick Leave	2040
Vacation Pay	2020
Employee Benefits	2110
District Issued Uniforms & Annual Clothing Stipend	2090
Customer Service Representative	2330

Following are new policies that are currently before the Board for adoption:

<u>Policy Name</u>	<u>Number</u>
Apprenticeship Program	2095
Administrative Analyst	2095
Clerk / Administrative Assistant	2090
Operations Manager	2345
Water Distribution / Treatment Operator	2350

The above new job policies will be replacing the following job classification currently in the policy: 2300, 2305, 2310, 2315, 2320 and 2325.

**FINANCIAL CONSIDERATIONS:**

None at this time. All proposed updates have been budgeted for during this current fiscal year (FY23). In addition, the salary schedule and updates to benefits were incorporated in the most current UPUD rate study.

*Attachments: Resolution No. 2023-002 Adopting Updates to the UPUD Employee Policy  
Current Policies  
Proposed Policies*



**RESOLUTION NO. 2023-001**

**UNION PUBLIC UTILITY DISTRICT  
BOARD OF DIRECTORS**

**UPDATING DISTRICT EMPLOYEE POLICIES**

**WHEREAS**, The Board of Directors of the Union Public Utility District has the authority to change existing policies and implement new policies; and

**WHEREAS**, the Board of Directors and District staff aim to provide competitive salaries and benefits in order to retain and support employees; and

**WHEREAS**, the Board of Directors and District staff wish to modify the following policies; and

<u>Policy Name</u>	<u>Number</u>
Salary Schedule	2009
Holiday Schedule	2030
Sick Leave	2040
Vacation Pay	2020
Employee Benefits	2110
District Issued Uniforms & Annual Clothing Stipend	2090
Customer Service Representative	2330

**WHEREAS**, the Board of Directors wish to add the following policies;

<u>Policy Name</u>	<u>Number</u>
Apprenticeship Program	2095
Administrative Analyst	2095
Clerk / Administrative Assistant	2090
Operations Manager	2345
Water Distribution / Treatment Operator	2350

**WHEREAS**, the above new job classifications (2035, 2040, 2045 and 2050) will replace the following job classifications currently in the employee policy: 2300, 2305, 2310, 2315, 2320, and 2325.

**NOW, THEREFORE, BE IT RESOLVED** the Board of Directors of the Union Public Utility District hereby adopts updated UPUD Employee Policy numbers 2020, 2030, 2040, 2009, 2110, 2095, 2090, 2335, 2340, 2345 and 2350 for incorporation into the Employee Policy Handbook effective immediately.

**PASSED, APPROVED, AND ADOPTED** this 19<sup>th</sup> day of April, 2023.

AYES:

NOES:

ABSENT:

ABSTAIN:

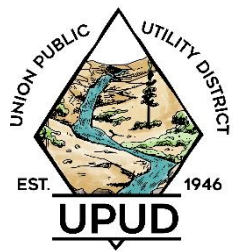
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Eric Bottomley, President  
Union Public Utility District

I hereby certify that the within and foregoing is a full, true, and correct copy of the Resolution which was duly passed and adopted at a regular meeting of the Board of Directors of the Union Public Utility District on the 15<sup>th</sup> day of March 2023.

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Elaine M Urruty  
Clerk to the Board



6. a. 1.

Policy No. 2009

Salary Schedule – Current Policy

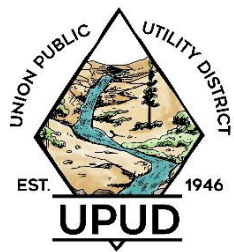
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# Union Public Utility District

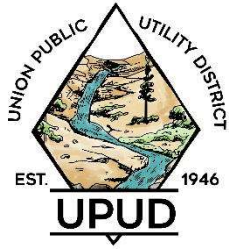
## **POLICY HANDBOOK**

**POLICY TITLE:** Salary Schedule  
**POLICY NUMBER:** 2009  
**DATE ADOPTED:** January 16, 2008

**2009.1** The Board of Directors has adopted a Salary Schedule. This document sets the wages for the classifications of employees and aids in the annual budgeting process. The Salary Schedule may be reviewed from time to time at the Board's discretion. The most current version adopted by the Board of Directors is available, upon request, from the Office Manager.



6. a. 1.  
Policy No. 2009  
Updated Salary Schedule



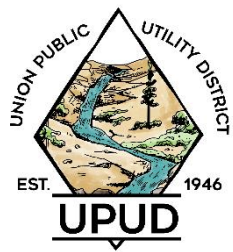
## UNION PUBLIC UTILITY DISTRICT 2022-2023 SALARY SCHEDULE

Position	Pay Range	Step A		Step B		Step C		Step D		Step E	
		Monthly	Hourly	Monthly	Hourly	Monthly	Hourly	Monthly	Hourly	Monthly	Hourly
Customer Service Representative I	12	\$3,861.87	\$22.28	\$4,054.96	\$23.39	\$4,257.71	\$24.56	\$4,470.59	\$25.79	\$4,694.12	\$27.08
Customer Service Representative II	14	\$4,267.47	\$24.62	\$4,480.84	\$25.85	\$4,704.88	\$27.14	\$4,940.13	\$28.50	\$5,187.13	\$29.93
Customer Service Representative III	22	\$4,952.13	\$28.57	\$5,199.74	\$30.00	\$5,459.73	\$31.50	\$5,732.71	\$33.07	\$6,019.35	\$34.73
Administrative Analyst	18	\$4,524.00	\$26.10	\$4,750.20	\$27.41	\$4,987.71	\$28.78	\$5,237.10	\$30.21	\$5,498.95	\$31.72
Clerk of the Board/Administrative Assistant	26	\$5,373.33	\$31.00	\$5,642.00	\$32.55	\$5,924.10	\$34.18	\$6,220.31	\$35.89	\$6,531.32	\$37.68
Water Distribution/Treatment Trainee	10	\$3,856.67	\$22.25	\$4,049.50	\$23.36	\$4,251.98	\$24.53	\$4,464.57	\$25.76	\$4,687.80	\$27.05
Water Distribution/Treatment Operator I	16	\$4,324.32	\$24.95	\$4,540.54	\$26.20	\$4,767.56	\$27.51	\$5,005.94	\$28.88	\$5,256.24	\$30.32
Water Distribution/Treatment Operator II	20	\$4,792.06	\$27.65	\$5,031.66	\$29.03	\$5,283.25	\$30.48	\$5,547.41	\$32.00	\$5,824.78	\$33.60
Water Distribution/Treatment Operator III	24	\$5,338.06	\$30.80	\$5,604.96	\$32.34	\$5,885.21	\$33.95	\$6,179.47	\$35.65	\$6,488.45	\$37.43
Chief Treatment Operator	28	\$5,914.13	\$34.12	\$6,209.84	\$35.83	\$6,520.33	\$37.62	\$6,846.35	\$39.50	\$7,188.67	\$41.47
Operations Manager	30	\$7,713.33	\$44.50	\$8,099.00	\$46.73	\$8,503.95	\$49.06	\$8,929.15	\$51.51	\$9,375.60	\$54.09
General Manager	BOARD										

\*5% Annual step increase on anniversary date.

### Longevity Pay

Year of continuous, full time service	10	15	20	25
	2.5%	5.0%	7.5%	10%



6. a. 3.

Policy No. 2030

Holiday Schedule – Current Policy

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# Union Public Utility District

## POLICY HANDBOOK

**POLICY TITLE:** Holidays  
**POLICY NUMBER:** 2030  
**DATE ADOPTED:** August 15, 2007

**2030.1** This policy shall apply to all full-time employees. Part-time and temporary employees are not eligible for holiday pay.

**2030.2** The following days shall be recognized and observed as paid holidays:

- New Years Day;
- Martin Luther King, Jr.'s Birthday;
- President's Day;
- Memorial Day;
- Independence Day;
- Labor Day;
- Columbus Day;
- Veteran's Day;
- Thanksgiving Day;
- Day after Thanksgiving Day;
- Christmas Eve;
- Christmas Day

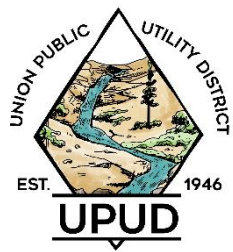
**2030.3** All regular work shall be suspended and employees shall receive one-day's pay for each of the holidays listed above. An employee is eligible for any paid holiday if he/she works the day before and the day after said holiday. Eligibility is also granted if the employee was on vacation or had notified their immediate supervisor and received permission to be absent from work on that specific day or days.

**2030.4** Whenever a holiday falls on Saturday, the preceding Friday shall be observed as the holiday. Whenever a holiday falls on Sunday, the following Monday shall be observed as the holiday.

**2030.5** When an employee is taking an authorized leave with pay when a holiday occurs, said holiday shall not be charged against said leave with pay.

**2030.6** If any non-exempt employee works on any of the holidays listed above, he/she shall, in addition to his/her holiday pay, be paid for all hours worked at the rate of time and one-half (1½) his/her regular rate of pay, or as otherwise specified under Policy #2010, "Hours of Work and Overtime."





6. a. 3.

Policy No. 2030

Holiday Schedule – Updated Policy

**POLICY AND PROCEDURE**  
**UNION PUBLIC UTILITY DISTRICT**

DATE APPROVED	MANUAL	POLICY NO. 2030
APPROVED BY: Board of Directors	POLICY TITLE <b>Holidays</b>	Page 1-2

2030.1 This policy shall apply to all full-time employees. Part-time and temporary employees are not eligible for holiday pay.

2030.2 The following days shall be recognized and observed as paid holidays:

New Year's Day	January 1
Martin Luther King, Jr.'s Birthday	Third Monday in January
President's Day	Third Monday in February
Memorial Day	Last Monday in May
Independence Day	July 4
Labor Day	First Monday in September
Juneteenth	June 19
Veteran's Day	November 11
Thanksgiving Day	Fourth Thursday in November
Day after Thanksgiving	Friday after Thanksgiving Day
Christmas Eve	December 24
Christmas Day	December 25
One floating holiday, granted to full-time employees. Employees who do not use the floating holiday time accrued by the end of the year will forfeit the time off.	

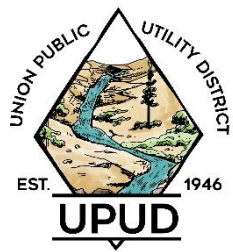
2030.3 All regular work shall be suspended, and employees shall receive one day's pay for each of the holidays listed above. An employee is eligible for any paid holiday if they work the day before and the day after said holiday. Eligibility is also granted if the employee was on vacation or had notified their immediate supervisor and received permission to be absent from work on that specific day or days.

2030.4 Whenever a holiday falls on Saturday, the preceding Friday shall be observed as the holiday. Whenever a holiday falls on a Sunday, the following Monday shall be observed as the holiday.

2030.5 When an employee is taking an authorized leave with pay when a holiday occurs, said holiday shall not be charged against said leave with pay.

**POLICY AND PROCEDURE**  
**UNION PUBLIC UTILITY DISTRICT**

2030.6 If any non-exempt employee works on any of the holidays listed above, they shall, in addition to their holiday pay, be paid for all hours worked at the rate of time and one-half their regular rate of pay, or as otherwise specified under Policy #2010, "Hours of Work and Overtime."



6. a. 4.

Policy No. 2040

Sick Leave Policy – Current Policy

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# Union Public Utility District

## POLICY HANDBOOK

**POLICY TITLE:** Sick Leave  
**POLICY NUMBER:** 2040  
**DATE ADOPTED:** January 16, 2008

**2040.1** All full-time, permanent employees of the District shall be entitled to eight (8) hours of sick leave with pay for each month worked. Part-time and temporary employees are excluded from sick leave.

**2040.2** Full-time employees will be allowed to accumulate up to four hundred (400) hours of sick leave. Payout of any excess accruals over the maximum amount will be paid to the employee on a bi-weekly basis.

**2040.3** Sick leave with pay shall be granted for an illness or in the event of an illness of a spouse or member of the employee's immediate family. Sick Relative time may be used up to a maximum of one half (1/2) of the sick time accrued in one calendar year.

**2040.4** For purposes of defining "immediate family", shall mean mother, father, husband, wife, son, daughter, grandson, granddaughter, brother, sister, mother-in-law, father-in-law, or the employee, or any relative living in the immediate household of the employee.

**2040.4.1** The manager may require evidence in the form of a physician's certificate verifying the reason for the employee's absence during the time when such sick leave was requested.

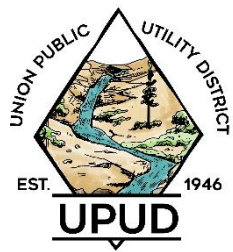
**2040.5** The provisions of the sick leave plan shall apply to both on and off the job injuries and illnesses. Employees may use sick leave for medical, dental and eye care appointments.

**2040.6** In order to receive compensation while on sick leave, the employee shall notify his/her supervisor prior to the time for beginning the regular work day, or as soon thereafter as practical.

**2040.7** If absence from duty by reason of illness occurs, satisfactory evidence may be required by the immediate supervisor.

**2040.8** Upon retirement, unused sick leave may be used towards CalPERS service credit, as per the District's contract with CalPERS. Sick leave in excess of the maximum in the accrual banks (400 hours) will be paid out to the employee on the regular bi-weekly paycheck at one half (1/2) their regular rate of pay. Termination for cause shall result in the loss of accrued sick leave.

**2040.9** Upon separation from the District, other than retirement, the employee will forfeit any accrued and unused sick leave.



6. a. 4.

Policy No. 2040

Sick Leave Policy – Updated Policy

**POLICY AND PROCEDURE  
UNION PUBLIC UTILITY DISTRICT**

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DATE APPROVED:	MANUAL	POLICY NO. 2040
APPROVED BY: Board of Directors	POLICY TITLE <b>Sick Leave</b>	Page 1-2

**PURPOSE OF POLICY**

2040.1 It is the policy of Union Public Utility District to establish and maintain a sick leave policy in order to assure that employees are afforded reasonable opportunities to address the medical needs of themselves and their immediate family members without loss of pay.

2040.2 To minimize the economic hardships that may result from an unexpected short-term illness or injury to an employee or legal dependent, the District provides regular employees with sick leave.

2040.3 All full-time, permanent employees of the District shall be entitled to eight (8) hours of sick leave with pay for each month worked.

2040.4 Sick leave is not considered vacation and is to be used only as set forth in Section 2040.8 of this Policy and for leaves of absence as set forth in policies 2045 and 2050 (Leaves of Absence). If all accrued sick leave is exhausted due to illness or injury, vacation may be used subject to the approval of the General Manager. An employee with no sick leave or vacation credit will not receive compensation for days not worked due to illness or injury. Abuse is grounds for disciplinary action.

2040.5 The bi-weekly pay record will reflect the current sick leave accumulation for each employee. Sick will continue to accrue with no maximum. When you retire from UPUD you will have the option to roll your remaining sick balance into service credit toward your PERS years of service.

**PART-TIME REGULAR EMPLOYEES**

2040.6 Part-time regular employees will earn sick leave pro-rated based on the full-time equivalent percentage of his or her position, unless otherwise required by applicable law.

**REQUIRED EVIDENCE**

2040.7 When allowed by applicable law, the District reserves the right to require a satisfactory statement of a licensed medical practitioner whenever an employee misses work due to an illness, injury, or disability. The employee may be asked to provide a licensed medical practitioner's statement that verifies the beginning and ending dates of an illness, injury or disability, and/or the employee's ability to return to work without endangering his or her own safety or the safety of others. When requested, such verifications and releases

## **POLICY AND PROCEDURE**

### **UNION PUBLIC UTILITY DISTRICT**

may be a condition to receiving sick leave benefits or returning to work. Sick leave benefits are contingent upon maintenance of regular contact. Employees are expected to inform his or her supervisor and/or department manager of his or her absence prior to the start of the workday or within the first 15 minutes of the start of the shift (except in emergency situations), inform them of his or her estimated date of return to work and to maintain this communication. Employees who know he or she will be absent for more than five (5) consecutive working days, may need to apply for a leave of absence (see policy #2045, Family and Medical Leave) situations where a pattern of questionable sick leave has been established and determines it is warranted.

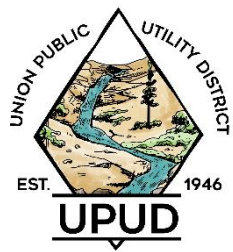
#### **PERMISSIBLE SICK LEAVE USES**

2040.8 Employees may utilize sick leave for the diagnosis, care or treatment of an existing health condition of, or preventative care for, an employee or an employee's family member. "Family member" is defined to include:

Any relation by blood, marriage, or adoption, who is a member of the employee's household, residing under the same roof, and any spouse or registered domestic partner, child, step-child, child of a domestic partner, grandchild, parent, step-parent, grandparent, brother, sister, in-laws (son, daughter, father, mother, brother, sister), or legal guardian of the employee, regardless of residence.

2040.9 Employees who are rehired within one year from the date of separation from the District shall have any accrued and unused paid sick days reinstated.





6. a. 2.

Policy No. 2020

Vacation Policy – Current Policy

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# Union Public Utility District

## POLICY HANDBOOK

**POLICY TITLE:** Vacations  
**POLICY NUMBER:** 2020  
**DATE ADOPTED:** January 16, 2008

**2020.1** A full-time, permanent employee will accrue 6.66 hours of vacation time per month through their second (2<sup>nd</sup>) year of employment; however, they will not be eligible to use any of the accrued time until their probationary period (6 months) has been successfully completed. This rate of accrual equals 80 hours (2 weeks) per year. Years of service credit commences with the first day of the probationary period.

**2020.2** A full-time, permanent employee will accrue 10 hours of vacation time per month beginning on their third (3<sup>rd</sup>) year anniversary through their seventh (7<sup>th</sup>) year of employment. This rate of accrual equals 120 hours (3 weeks) per year.

**2020.3** A full-time, permanent employee will accrue 13.33 hours of vacation time per month beginning on their eighth (8<sup>th</sup>) year anniversary through their nineteenth (19<sup>th</sup>) year of employment. This rate of accrual equals 160 hours (4 weeks) per year.

**2020.4** A full-time, permanent employee will accrue 13.33 hours of vacation time per month beginning on their twentieth (20<sup>th</sup>) year anniversary through their twenty fourth (24<sup>th</sup>) year. This rate of accrual equals 160 hours (4 weeks) per year.

**2020.5** A full-time, permanent employee will accrue 16.67 hours of vacation time per month beginning on their twenty fifth (25<sup>th</sup>) year anniversary and above. This rate of accrual equals 200 hours (5 weeks) per year.

**2020.6** In the event a holiday falls during an employee's vacation the employee shall receive an additional day off at the employee's regular rate of pay.

**2020.7** Vacation time may be taken after successful completion of the six month probationary period provided ample notice is given to the Manager and that vacation time does not conflict or interfere with normal or emergency work schedules. When two or more vacations are in conflict, preference shall be determined by seniority.

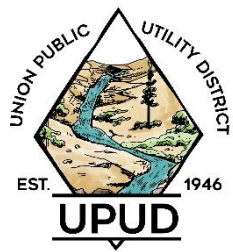
**2020.8** In the event an employee is terminated, resigns with notice or for other reasons leaves the employment of the District, the employee shall be entitled to receive payment for vacation accrued and not taken.

**2020.9** No employee shall receive any payment in lieu of vacation while in the employment of the District, without the approval of the Board of Directors. Such requests must be in writing to the Board of Directors and will be considered on an individual basis.

**2020.10** Vacation accrual of more than four hundred (400) hours will not be allowed. Payout of any excess accruals over the maximum amount allowed will be paid to the employee on a bi-weekly basis.

**2020.11** Part time and Temporary employees are not eligible for sick pay, vacation pay, paid holidays or compensatory time.

\*Continuous service means employment with the District without any break or interruption. Resignation, dismissal, leave of absence without pay, or any lay-off for lack of work, lack of funds, or abolishment of a position shall be construed as a break in service.



6. a. 2.

Policy No. 2020

Vacation Policy – Updated Policy

**POLICY AND PROCEDURE**  
**UNION PUBLIC UTILITY DISTRICT**

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DATE APPROVED	MANUAL	POLICY NO. 2020
APPROVED BY: Board of Directors	POLICY TITLE <b>Vacation</b>	Page 1-2

**PURPOSE OF POLICY**

The District recognizes the need for employees to have time away from work for personal rest and relaxation. It is the policy of the District that employees take vacation every year. Accrued vacation days may be used as single days or multiple days.

2020.1 A full-time, permanent employee will accrue 6.66 hours of vacation time per month, through their second (2<sup>nd</sup>) year of employment. This rate of accrual equals 80 hours (2 weeks) per year. Years of service credit commences with the first day of the probationary period.

2020.2 A full-time, permanent employee will accrue 10 hours of vacation time per month beginning on their (3<sup>rd</sup>) year anniversary through their seventh (7<sup>th</sup>) year of employment. This rate of accrual equals 120 hours (3 weeks) per year.

2020.3 A full-time, permanent employee will accrue 13.33 hours of vacation time per month beginning on their eighth (8<sup>th</sup>) year anniversary through their nineteenth (19<sup>th</sup>) year of employment. This rate of accrual equals 160 hours (4 weeks) per year.

2020.4 A full-time, permanent employee will accrue 16.67 hours of vacation time per month beginning on their twenty fifth (25<sup>th</sup>) year anniversary and above. This rate of accrual equals 200 hours (5 weeks) per year.

**PERMISSIBLE VACATION LEAVE USES**

Vacation time may be used for vacation, and personal business, and must be approved by the general manager at least 24 hours in advance. You are expected to receive managerial approval prior to taking any vacation time.

2020.5 In the event a holiday falls during an employee's vacation the employee shall receive an additional day off at the employee's regular rate of pay.

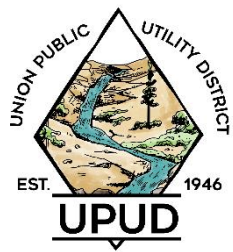
2020.6 Vacation time may be taken after successful completion of the six-month probationary period provided ample notice is given to the Manager and that vacation time does not conflict or interfere with normal emergency work schedules. When two or more vacations are in conflict, preference shall be determined by seniority.

**POLICY AND PROCEDURE**  
**UNION PUBLIC UTILITY DISTRICT**

2020.7 In the event an employee is terminated, resigns with notice or for other reasons leaves the employment of the District, the employee shall be entitled to receive payment for vacation accrued and not taken.

2020.8 Vacation will be capped at 400 hours. Payout of any excess accruals over the maximum amount allowed will be paid to the employee at the end of the calendar year.

2020.9 No employee shall receive any payment in lieu of vacation while in the employment of the District, without the approval of the Board of Directors. Such requests must be in writing to the Board of Directors and will be considered on an individual basis.



6. a. 5.

Policy No. 2110

Employee Benefits Policy – Current Policy

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# Union Public Utility District

## POLICY HANDBOOK

**POLICY TITLE:** Health and Welfare Benefits

**POLICY NUMBER:** 2110

**DATE ADOPTED:** December 9, 2008

**2110.1 Health Insurance.** The District currently pays for the cost of health insurance for the employee and their dependents. Part-time employees working less than 27 hours per week are not eligible for health insurance benefits under the current plan. The scope of coverage and the portion of premiums to be paid by the District is subject to periodic review and revision by the Board of Directors.

**2110.2 Dental Insurance.** The District currently pays for the cost of dental insurance for the employee and their dependents. Part-time employees working less than 27 hours per week are not eligible for health insurance benefits under the current plan. The scope of coverage and the portion of premiums to be paid by the District is subject to periodic review and revision by the Board of Directors.

**2110.3 Vision Insurance.** The District currently pays for the cost of vision insurance for the employee and their dependents. Part-time employees working less than 27 hours per week are not eligible for health insurance benefits under the current plan. The scope of coverage and the portion of premiums to be paid by the District is subject to periodic review and revision by the Board of Directors.

**2110.4 Health Savings Account (HSA).** The District currently contributes \$250 per month into a Health Savings Account for each employee. The contribution amount to be paid by the District is subject to periodic review and revision by the Board of Directors.

**2110.5 Retirement Plan.** Any permanent employee working over twenty (20) hours per week on a regular basis is required to join the Public Employees Retirement System (CalPERS) immediately upon eligibility. Contributions made to the retirement system by the District in accordance with the current contract with the Board of Administration of the Public Employees Retirement System and the Board of Directors of the Union Public Utility District. Employees on temporary status are excluded from membership in said retirement system.

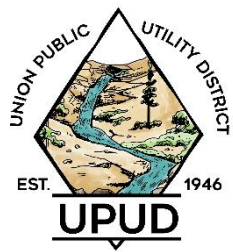
**2110.6 Opt Out Option.** Employees covered by the insurance of a spouse may choose to “opt out” of the provided health, dental and vision insurance and receive a monthly cash payment of \$1,000 in lieu of benefits. The employee choosing this option must provide proof of other coverage to be kept in their personnel file. This amount is capped and shall not be adjusted without approval by the Board of Directors.

**2110.7 457 Savings Plan.** District employees may elect to participate in the voluntary 457 Savings Plan. An amount determined by the employee may be deducted from the employee’s regular paycheck on a pre-tax basis and invested in the 457 Plan approved by the District.



**2110.8 State Disability Insurance (SDI).** The District participates in the voluntary State Disability Plan (SDI). A percentage of the employee's wages are deducted from the employee's regular paycheck and paid into the State fund for compensation during non-work related illness or injury.

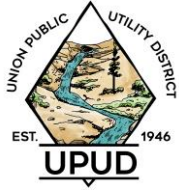
**2110.9 Workers' Compensation Insurance.** All District employees will be insured against injuries received while on the job as required by State law.



6. a. 5.

Policy No. 2110

Employee Benefits Policy – Updated  
Policy



**Union Public Utility District**  
**POLICY TITLE: EMPLOYEE BENEFITS**  
**POLICY NUMBER: 2110**

**DATE APPROVED:**

The following provides a summary of the District's benefit package.

**Retirement Benefits** (Policy Number 2110.5) Provided through the California Public Employees' Retirement System (CalPERS).

**Social Security:** The District participates in Social Security and Medicare.

**Medical Insurance** (Policy Number 2110.1) The District pays for the cost of health insurance for full-time employees and their dependents.

**Dental Insurance** (Policy Number 2110.2) The District pays for the cost of dental insurance for full-time employees and their dependents.

**Vision Insurance** (Policy Number 2110.3) The District pays for the cost of vision insurance for full-time employees and their dependents.

**State Disability Insurance (SDI)** (Policy Number 2110.8) The District participates in the voluntary State Disability Plan.

**457 Savings Plan** (Policy Number 2110.7) District employees may elect to participate in the voluntary 457 Savings Plan.

**Workers' Compensation Insurance** (Policy Number 2110.9) All District employees will be insured against injuries received while on the job as required by State Law.

**Vacation** (Policy Number 2020 – REVISED) Following six months of continuous employment, annual vacation accruals are as follows: 0-2 years = 10 days; 3-7 years = 15 days; 8-24 years = 20 days; 20+ years or more = 25 days

**Sick Leave** (Policy Number 2040 – REVISED) Following one month of continuous employment, annual sick leave accrues at 12 days per year.

**Holidays** (Policy Number 2030 – REVISED) 12 paid holidays, plus one floating holiday per year.

**Bereavement Leave** (Policy Number 2050)

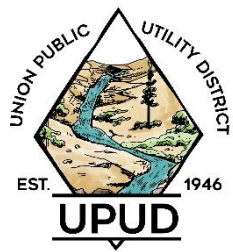
**Jury/Witness Duty** (Policy Number 2060)

**Apprenticeship Program** (Policy Number 2095 – NEW) Tuition (up to \$3,000) will be offered upon signed contract by employee. The District will give a one-time bonus payment for each Water Treatment or Water Distribution Certification that the employee receives while currently working for Union Public Utility District.

Eligible certifications and licenses that may be acceptable for additional bonus pay include the following: Commercial driver's license (Class A or B); Cross Connection Control; Backflow; Pesticide Spray; and any other certifications directly related to the employee's current position (subject to prior, written approval by the General Manager in his or her discretion).

**District-Issued Uniforms and an Annual Clothing Stipend** (Policy Number 2090 – REVISED)

DATE ADOPTED: December 9, 2008



6. a. 6.

Policy No. 2095

Apprenticeship Program Policy – NEW  
Policy

**POLICY AND PROCEDURE**  
**UNION PUBLIC UTILITY DISTRICT**

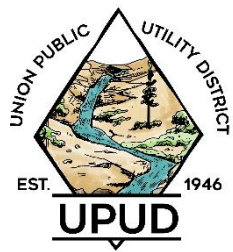
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DATE APPROVED:	MANUAL	POLICY NO. 2095
APPROVED BY: Board of Directors	POLICY TITLE <b>Apprenticeship Program</b>	Page 1

**PURPOSE OF POLICY**

It is the policy of Union Public Utility District to establish an apprenticeship program policy to assure that employees are able to gain professional skills and experience to acquire certificates and/or licenses that are necessary to perform their job duties and advancement in their field.

2095.1 Tuition (up to \$3,000) will be offered upon signed contract by employee stating they will remain employed for at least 2 years after completion of educational or certification program. If the employee leaves the District within 2 years, the employee is responsible for paying back UPUD's portion of the tuition cost.



6. a. 7.

Policy No. 2090

District Issued Uniforms and Annual  
Clothing Stipend Policy – Current Policy

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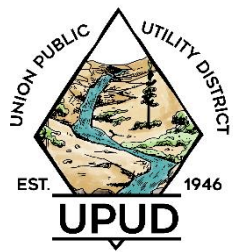
# Union Public Utility District

## **POLICY HANDBOOK**

**POLICY TITLE:** Uniforms and Protective Clothing  
**POLICY NUMBER:** 2090  
**DATE ADOPTED:** January 16, 2008

**2090.1** The cost of uniforms and/or protective clothing, shoes, etc., that employees are required to wear shall be borne by the District.

**2090.2** The District will reimburse qualifying employees upon proof of purchase for work boots up to a maximum of \$200 per calendar year. Receipts are required for reimbursement. There will be no carry over from one year to the next.



6. a. 7.

Policy No. 2090

District Issued Uniforms and Annual  
Clothing Stipend Policy – Revised



**POLICY AND PROCEDURE**  
**UNION PUBLIC UTILITY DISTRICT**

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DATE APPROVED:	MANUAL	POLICY NO. 2090
APPROVED BY: Board of Directors	POLICY TITLE <b>Uniforms and Protective Clothing</b>	Page 1

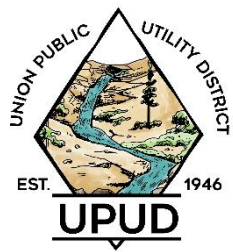
**PURPOSE OF POLICY**

It is the policy of Union Public Utility District to establish a uniform and protective clothing policy to identify the employee to the public as a Union Public Utility District employee, and to ensure a safe, clean, and healthy work environment.

2090.1 Staff will receive one (1) hat, five (5) shirts, and one (1) sweatshirt annually.

2090.2 The District will reimburse field staff for work boots, up to a maximum of \$200 per calendar year, upon proof of purchase and meeting all safety specification requirements. Rain gear will be reimbursed to field staff, up to a maximum of \$200 once every two calendar years, upon proof of purchase and meeting all safety specification requirements.

2090.3 Receipts are required for reimbursement. There will be no carryover from one year to the next.



6. a. 8.

Policy No. 2330

Job Description Policy, Customer Service  
Representative- Current Policy

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# Union Public Utility District

## **POLICY HANDBOOK**

**POLICY TITLE:** Job Description – Customer Service Representative  
**POLICY NUMBER:** 2330  
**DATE ADOPTED:** August 15, 2007

Department: Office Staff  
Salary Range: See Salary Schedule  
Reports to: Office Manager  
Employee Status: Part-time\*/Hourly  
Hours: Job requires approximately 15 hours per week and may have additional hours required for special projects or to keep the office open during business hours in the absence of the Office Manager. Occasionally fewer hours may be required.

### SUMMARY

Under the direction of the Office Manager, the Customer Service Representative's primary duty is to the public. The performance of duties associated with maintaining customer accounts and billing are the main function of this position. Various other administrative duties, as assigned by the Office Manager, are the secondary function.

### ESSENTIAL DUTIES AND RESPONSIBILITIES

The Customer Service Representative has a direct working relationship with customers in daily business activities such as:

- Process payments
- Process requests for service and repairs
- Customer service

The Customer Service Representative also:

- Inputs monthly water usage totals into the utility billing system, provided by the Meter Reader, for invoicing customers in a timely manner.
- Receives the general public regarding bill payments and other District business.
- Refers contacts beyond the scope of this position to the Office Manager or District Manager.

The Customer Service Representative must have the ability to follow directions, perform clerical duties including answering telephones, writing correspondence, filing, multiple mailings and other duties as assigned.

The Customer Service Representative must demonstrate proper telephone etiquette and be able to successfully manage diverse projects and assists all District personnel as needed. The ability to communicate in a professional manner both verbally and in writing is required in all contact with the public, board members and various agencies. Knowledge of general office equipment and computers is also required.

In order to perform this job successfully, an individual must be able to perform each essential duty satisfactorily.

QUALIFICATIONS:

LANGUAGE SKILLS

Ability to read, understand and interpret financial information, operating and maintenance instructions. Ability to respond professionally to Board members, employees, regulatory agencies and members of the public. Ability to write routine reports and correspondence.

MATHEMATICAL SKILLS

Ability to calculate figures and amounts such as ratios, percentages, discounts and interest.

REASONING ABILITY

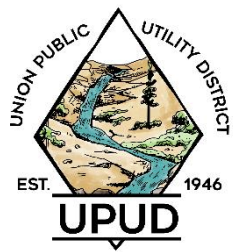
Ability to follow instructions.

CERTIFICATES, LICENSES, REGISTRATIONS

Valid California Driver's License

PHYSICAL DEMANDS

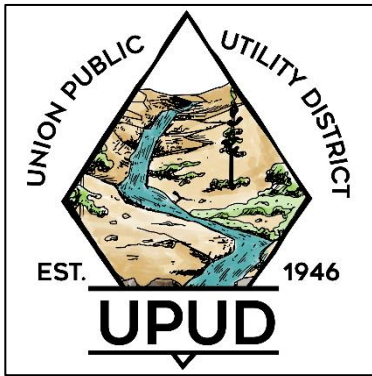
While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel; and speak and listen. The employee is required to reach with hands and arms, as well as stand, stoop and walk. The employee may be required to lift and/or move up to 35 pounds. Specific vision abilities required by this job include close vision and distance vision.



6. a. 8.

Policy No. 2330

Job Description Policy, Customer Service  
Representative- Updated Policy



**Union Public Utility District**  
**POLICY TITLE: JOB DESCRIPTION**  
**CUSTOMER SERVICE REPRESENTATIVE**  
**I/II/III**  
**POLICY NUMBER: 2330**  
**REPORTS TO: General Manager**  
**Wage Schedule Range: 12/14/22**  
**Date Approved:**

*Classification specifications (job descriptions) are intended to present a descriptive summary of the range of duties and responsibilities performed by an incumbent in the classification. Specifications are intended to outline the minimum qualification for entry into the classification and not intended to reflect all duties and responsibilities of an incumbent in the classification.*

### **Definition/Summary**

**Customer Service Representative I** – Is the entry level class in the series. Under close supervision, an incumbent in this position will perform a variety of customer service duties. This includes answering customer inquiries, payment procedures, maintenance of customer account records, clerical tasks, etc.

**Customer Service Representative II** is responsible for performing a wide variety of customer service duties. This includes daily cash receipts, deposits, and customer account issues related to payments, customer updates, water service issues, meter reading and billing of customer accounts. This position will assist the front office in daily customer service operations, clerical tasks and other duties as assigned. The Customer Service Representative II level is distinguished from the Customer Service Representative III level by the performance of less than the full range of duties assigned to the Customer Service Representative II level.

**Customer Service Representative III** receives only occasional instruction or assistance as new, unusual, or unique situations arise and is fully aware of the operating procedures and policies within the work unit. An incumbent in this position will perform the full range of assigned duties which includes more difficult and complex assignments and technical and functional supervision to incumbents in class levels I, and II.

### **Essential Duties and Responsibilities**

*Other duties may be assigned.*

1. Opens cash terminal at the start of the day.
2. Answers telephone and greets office visitors, providing a wide range of receptionist duties related to office procedures and meeting preparation.
3. Greet customers and visitors at the front desk in a pleasant and courteous manner and provide whatever assistance they may need.
4. Receives, and distributes daily mail.
5. Receives and processes daily cash receipts, posts payments to customer accounts, and prepares bank deposit related to District accounts.
6. Reconcile cash drawer daily at close of business.
7. Performs and resolves a variety of customer related functions regarding the establishment and maintenance of District customer billing, payment, and account related services.
8. Prepares, processes, and resolves delinquent account issues.
9. Discusses account or meter related issues with District staff as needed.
10. Prepares work orders related to District and customer water leaks and maintenance issues.

11. Assists with scheduling customer service requests regarding account services, changes, complaints, and other services.
12. Prepares, records, reviews and processes monthly meter reading and billing statements.
13. Conduct daily opening and closing office procedures.
14. Respond to phone calls, messages, and emails.
15. Answer main phone line, route calls, or take messages for internal and external customers.
16. Serve as cashier using utility billing software, receive and post all forms of payments received via mail, drop box, phone, in person, or in electronic form.
17. Check customer service email address inbox and customer service voicemail frequently and distribute or respond as appropriate.
18. Sort, open, and process customer service mail.
19. Create, track, and process Utility Service Requests (USRs).
20. Prepare and send work orders.
21. Process customer address updates.
22. File and maintain all customer service files, both hard copy and digital.
23. Assist other customer service representatives with tasks as required, including the preparation of form letters, lock-off letters, returned mail, etc.
24. Regular attendance and adherence to prescribed work schedule to conduct job responsibilities.
25. Maintain customer accounts; includes processing account and leak adjustments, payments, Auto ACH, refunds, return payment items, change in services, secondary bill- to, final bills, lock-offs, restoration of service, collections, general account clean-up, etc.
26. Prepare a variety of letters, account demands, credit references, account updates, possible leaks, etc.
27. Perform other duties as assigned.

**Knowledge of:**

1. Geography of the District and the location of District facilities.
2. Mathematical methods, practices, and procedures of financial and statistical recordkeeping.
3. Extensive Customer Service skills, procedures, and method for communicating effectively.
4. Ability and knowledge to use Microsoft Office Suite programs for word processing and spreadsheets.
5. Receptionist and office communications and etiquette practices.

**Ability to:**

1. Follow oral and written direction.
2. Work with minimal supervision to accomplish task as directed.
3. Regular attendance and adherence to prescribed work schedule to conduct job responsibilities.
4. Respond to and effectively prioritize multiple phone calls and other request or interruptions.
5. Correct English usage, spelling, grammar, and punctuation.
6. Efficiently use computer and financial database programs with sufficient speed and accuracy to perform assigned work, intermediate to advanced skills in Microsoft Office programs.
7. Evaluate and respond appropriately to customer complaints.
8. Handle stressful situations and difficult customers in a calm and professional manner.
9. Plan, coordinate, prioritize and organize multiple work tasks to meet deadlines with accuracy, thoroughness, and attention to detail, sometimes with little supervision.
10. Read, understand, and carry out written and oral directions in a clear, concise, and consistent manner.

11. Use initiative and independent judgment within established procedural guidelines.
12. Use arithmetic to make basic financial calculations quickly and accurately.
13. Operate a variety of automated office machines typical of a work environment such as a multi-function printer/copier/scanner machine, fax machine, check machine, etc.
14. Establish and maintain an effective and cooperative working relationship with coworkers through knowledge of work, personal and professional conduct, teamwork, and good judgment.

### **Physical Demands**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to sit. Sufficient finger/hand coordination and dexterity to operate and adjust office equipment is essential. Specific vision abilities required by this job include close vision and the ability to adjust focus.

### **Work Environment**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually moderate. On a continuous basis sit at a desk and in meetings for long periods of time; intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone, write, or use a keyboard and mouse to communicate through written means.

This job specification should not be construed to imply that these requirements are the exclusive standards of the position. Incumbents will follow any other instructions, and perform any related duties, as may be required.

### **Education and Experience**

#### **Customer Service Representative I:**

Three years of general clerical and accounting office experience, which has included one year of public contact experience. Previous fee collection experience at a utility or governmental agency is desirable.

#### **Customer Service Representative II:**

In addition to the qualifications above, the Customer Service Representative II has four (4) years of increasingly responsible clerical/customer service experience, preferably including experience in working with a water or utility billing agency and a variety of office support work. Administrative support experience that includes providing direct support to management and executive level staff and Board of Directors, preferable within a public agency.

#### **Customer Service Representative III:**

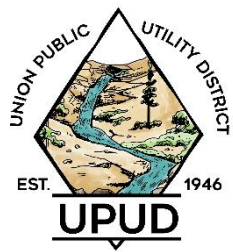
In addition to the qualifications above, the Customer Service Representative III has five (5) years of increasingly responsible office administrative or customer service experience. Experience in a municipal setting, experience with utility billing, and experience with Springbrook software are desired. Prior supervisory experience is preferred.



An Associate's degree with coursework in business administration, communication or a related field is preferable.

**Certificates, Licenses, Registrations**

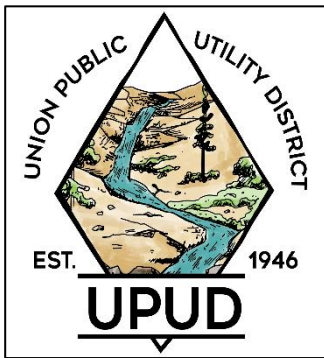
Possession of a valid California driver's license and a continuing acceptable driving record.



6.a.8.

Policy No. 2335

Job Description Policy, Administrative  
Analyst – New Policy



**Union Public Utility District**  
**POLICY TITLE: JOB DESCRIPTION**  
**ADMINISTRATIVE ANALYST**  
**POLICY NUMBER: 2335**  
**REPORTS TO: General Manager**  
**Wage Schedule Range: 18**

*Classification specifications (job descriptions) are intended to present a descriptive summary of the range of duties and responsibilities performed by an incumbent in the classification. Specifications are intended to outline the minimum qualification for entry into the classification and not intended to reflect all duties and responsibilities of an incumbent in the classification.*

**Definition/Summary**

Under direction of the General Manager, this position is responsible for updating District policies and communication practices, development, and administration of grants; various professional development, and administrative activities in support of the District's administration including highly responsible, confidential and complex support to the General Manager. This position is responsible for assisting in day-to-day administrative functions, provides administrative support for the implementation and monitoring of departmental programs; provides assistance to staff, on all levels, on a wide range of activities.

**Essential Duties and Responsibilities**

*Other duties may be assigned.*

1. Assist the General Manager in carrying out rules, regulations, and policies of the Agency.
2. Provides analytical support in preparing draft policies and procedures for District administrative functions.
3. Assists General Manager and participates in the development of the Agency's work plan.
4. Researches, complies, and analyzes data for special projects, various reports, and presentations.
5. Researches and assists in administration of grants.
6. Generate and manage content posted on the District's website and social media accounts.
7. Answer's telephone and greets office visitors, providing a wide range of receptionist duties related to office procedures and meeting preparation.
8. Receives, processes, and maintains accounts payable records.
9. Allocates and maintains proper posting to general ledger accounts.
10. Prepares a wide variety of financial reports, and monthly accounts receivable reconciliation.
11. Researches and assists General Manager with document preparation, technical information and research of assignments as directed.
12. Regular attendance and adherence to prescribed work schedule to conduct job responsibilities.
13. Establish and maintain cooperative working relationships with co-workers, outside agencies and the public.
14. Perform other duties as assigned.

**Knowledge of:**

1. District operations, procedures, policies, precedents, and rules and regulations.
2. Grant writing, administration, and state and federal solicitation processes.
3. Customer Service skills, procedures, and method for communicating effectively.
4. Adobe Acrobat for professional document finishing, indexing and compilation.
5. Modern office practices, procedures, and computer equipment/software.
6. Principles and practices of effective customer service.
7. Microsoft Office Suite programs for word processing and spreadsheets.
8. Standard business practices such as letter writing, report writing, preparing informational materials in visual formats.
9. English language usage, spelling, grammar, and punctuation.
10. Pertinent Federal, State, and local laws, codes and regulations for Special Districts, including the Brown Act, California Public Records Act, and Political Reform Act, etc.

**Ability to:**

1. Under minimal supervision, perform a variety of administrative and analytical support work involving the use of sound independent judgment and personal initiative for the General Manager to effectively carry out operations of the District.
2. Analyze situations carefully and adopt effective courses of action.
3. Maintain confidential data and information for appropriate personnel.
4. Independently prepare correspondence and memorandums.
5. Successfully adapt to changing workload and task assignments.
6. Adapt to changing technologies and learn functionality of new equipment and systems.
7. Plan, coordinate, and organize work to meet deadlines with accuracy, thoroughness, and attention to detail.
8. Establish, communicate, and maintain cooperative working relationships with co-workers, members of the public and outside agencies.
9. Read, understand, and carry out written and oral directions in a clear, concise, and consistent manner.
10. Operate a variety of automated office machines typical of a work environment such as a multi- function printer/copier/scanner machine, and fax machine.
11. Operate a computer for the effective operation of the Department including word processing, database, spreadsheet, presentations, email, Internet, and an integrated accounting software package.

**Physical Demands:**

While performing the duties of this job, the employee is regularly required to sit. The employee frequently is required to use hands to finger, handle, or feel objects, tools, or controls and talk or hear. Specific vision abilities required by this job include close vision and the ability to adjust focus.

**Work Environment:**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually moderate. On a continuous basis sit at a desk and in meetings for long periods of time; intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone, write, or use a keyboard and mouse to communicate through written means.

This job specification should not be construed to imply that these requirements are the exclusive standards of the position. Incumbents will follow any other instructions, and perform any other related duties, as may be required.

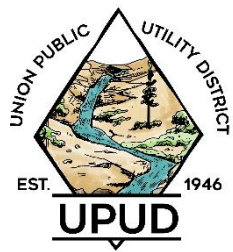
**Experience and Education:**

At least six (6) years of administrative support experience that includes providing direct support to management and executive level staff and Board of Directors, preferably within a public agency.

Associate's degree with coursework in business administration, communication or a related field.

**Certificates, Licenses, Registrations:**

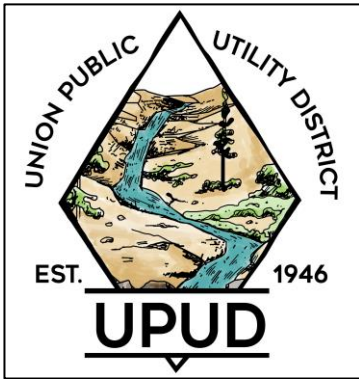
Possession of a valid California driver's license and a continuing acceptable driving record.



6.a.8.

Policy No. 2340

Job Description Policy,  
Clerk/Administrative Assistant – New  
Policy



**Union Public Utility District**  
**POLICY TITLE: JOB DESCRIPTION**  
**CLERK/ADMINISTRATIVE ASSISTANT**  
**POLICY NUMBER: 2340**  
**REPORTS TO: General Manager**  
**Wage Schedule Range: 26**  
**Effective Date:**

*Classification specifications (job descriptions) are intended to present a descriptive summary of the range of duties and responsibilities performed by an incumbent in the classification. Specifications are intended to outline the minimum qualification for entry into the classification and not intended to reflect all duties and responsibilities of an incumbent in the classification.*

**Definition/Summary**

Under direction of the General Manager, this confidential position shall perform a variety of highly responsible, confidential, and complex administrative support duties for the General Manager and performs a wide variety of customer service duties and accounting functions, which includes customer service duties related to customer inquiries, and accounts payable and general ledger account duties. This position also serves as the Clerk to the Board and performs all duties as Secretary to the Board of Directors, which includes timely preparation, posting and distribution of Board meeting agendas, minutes and related documents, updates and coordinates scheduling of Board Member records and requirements and election related information.

**Essential Duties and Responsibilities**

*Other duties may be assigned.*

1. Assist the Board of Directors in carrying out rules, regulations, and policies of the Agency.
2. Maintains permanent records of the official activities of the Agency.
3. Administers the Records Retention policy and program.
4. Acts as the Custodian of Records for the Agency.
5. Takes and transcribes the minutes of the meetings of the Board of Directors.
6. Coordinates committee meetings as necessary; informs the public of the procedures and legal requirements for presentation to the Board.
7. Attends to or directs the execution of various routine details of the Board of Director transactions; maintains confidential files and exercises mature judgment in matters of a confidential nature.
8. Performs other tasks as necessary associated with the Board Secretary duties.
9. Assists General Manager and participates in the development of the Agency's work plan; provides a lead office role and assign work activities, projects, and programs; monitor workflow; review and evaluate work products, methods, and procedures, and assist field operations on public information requests, work orders, and other essential tasks for effective and efficient district operations.
10. Answer's telephone and greets office visitors, providing a wide range of receptionist duties related

to office procedures and meeting preparation.

11. Prepares, processes, and resolves delinquent account issues, including customer notification, verification, and liens.
12. Receives, processes, and maintains accounts payable records.
13. Allocates and maintains proper posting to general ledger accounts.
14. Prepares, calculates, and reports annual 1099's and 1096 submittals.
15. Prepares a wide variety of financial reports including, but not limited to, Budget, Investment, Workers Compensation, annual Government Compensation Report, and monthly accounts receivable reconciliation.
16. Maintains records related to Board policies, meetings, FPPC filings, compliance requirements and Board vacancies.
17. Attends and participates in meetings as needed, including Board of Directors committees, regular, special, and other public meetings and records all official proceedings; accurately prepares minutes and other documents; and follows up on action items.
18. Maintains employee timecard records, including recordkeeping and payroll related duties as assigned.
19. Researches and assists General Manager with document preparation, technical information and research of assignments as directed.
20. Regular attendance and adherence to prescribed work schedule to conduct job responsibilities.
21. Establish and maintain cooperative working relationships with co-workers, outside agencies and the public.
22. Perform other duties as assigned.

**Knowledge of:**

1. District operations, procedures, policies, precedents, and rules and regulations.
2. Geography of the District and the location of District facilities.
3. Agenda preparation and distribution requirements.
4. Customer Service skills, procedures, and method for communicating effectively.
5. The functions and operating procedures of local governance bodies and committees.
6. Modern office practices, procedures, and computer equipment/software.
7. Principles and practices of effective customer service.
8. Microsoft Office Suite programs for word processing and spreadsheets.
9. Standard business practices such as letter writing, report writing, preparing informational materials in visual formats.
10. English language usage, spelling, grammar, and punctuation.
11. Pertinent Federal, State, and local laws, codes and regulations for Special Districts, including the Brown Act, California Public Records Act, and Political Reform Act, etc.



**Ability to:**

1. Under minimal supervision, perform a variety of administrative and analytical support work involving the use of sound independent judgment and personal initiative for the General Manager and Board of Directors and in a lead role to effectively carry out operations of the District.
2. Analyze situations carefully and adopt effective courses of action.
3. Maintain confidential data and information for appropriate personnel.
4. Independently prepare correspondence and memorandums.
5. Successfully adapt to changing workload and task assignments.
6. Adapt to changing technologies and learn functionality of new equipment and systems.
7. Plan, coordinate, and organize work to meet deadlines with accuracy, thoroughness, and attention to detail.
8. Establish, communicate, and maintain cooperative working relationships with co-workers, members of the public and outside agencies.
9. Read, understand, and carry out written and oral directions in a clear, concise, and consistent manner.
10. Operate a variety of automated office machines typical of a work environment such as a multi- function printer/copier/scanner machine, and fax machine.
11. Operate a computer for the effective operation of the Department including word processing, database, spreadsheet, presentations, email, Internet, and an integrated accounting software package.

**Physical Demands:**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to sit. Sufficient finger/hand coordination and dexterity to operate and adjust office equipment is essential. Specific vision abilities required by this job include close vision and the ability to adjust focus.

**Work Environment:**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually moderate. On a continuous basis sit at a desk and in meetings for long periods of time; intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone, write, or use a keyboard and mouse to communicate through written means.

This job specification should not be construed to imply that these requirements are the exclusive standards of the position. Incumbents will follow any other instructions, and perform any other related duties, as may be required.

**Experience and Education:**

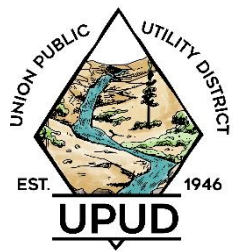
At least six (6) years of administrative support experience that includes providing direct support to management and executive level staff and Board of Directors, preferably within a public agency.

Associate's degree with coursework in business administration, communication or a related field is preferred, or equivalent.

A bachelor's degree from an accredited four (4) year college or university with major coursework in public or business administration, communication or a related field is desired.

**Certificates, Licenses, Registrations**

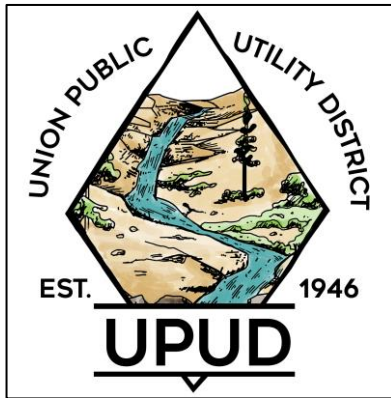
Possession of a valid California driver's license and a continuing acceptable driving record.



6.a.8.

Policy No. 2345

Job Description Policy, Operations  
Manager – New Policy



**Union Public Utility District**  
**POLICY TITLE: JOB DESCRIPTION**  
**OPERATIONS MANAGER**  
**POLICY NUMBER: 2345**  
**REPORTS TO: General Manager**  
**Wage Schedule Range: 30**  
**Effective Date:**

*Classification specifications (job descriptions) are intended to present a descriptive summary of the range of duties and responsibilities performed by an incumbent in the classification. Specifications are intended to outline the minimum qualification for entry into the classification and not intended to reflect all duties and responsibilities of an incumbent in the classification.*

**Definition/Summary**

Under the general and administrative direction of the General Manager, the Operations Manager plans, organizes, and directs the water treatment and distribution function of the District. Must have a full range of water treatment and distribution experience, including repairs of the equipment used in the water treatment process, including pumps, motors, electrical, charts and computers for the efficiency of plant operations. Ability to repair, maintain and operate valves, mains, hydrants, storage tanks, meters and related water distribution and transmission facilities and appurtenances in the field, shop, or plant.

**Essential Duties**

1. Plans, organizes, directs, and coordinates the operation and maintenance of the District's water treatment plant and distribution systems.
2. Leads water systems team to assure efficiency throughout the system.
3. Assesses the performance of all water systems team members.
4. Provides general supervision and administration of the District's water treatment plant and distribution systems (including pipelines, pressure stations, valves and hydrants).
5. Oversees the proper functioning of systems, coordinating repairs with maintenance and operations personnel.
6. Provides training of employees on work procedures, standards, and safety programs.
7. Develops recommendations and assists the General Manager with long-range planning for system improvements and service requirements.
8. Develop implements and oversees preventive maintenance.
9. Provides field evaluation, inspections, and monitoring to assist and plan jobs.
10. Oversees the water treatment and distribution controls costs.
11. Oversee and inspects plant and distribution systems to insure proper utilization of staff and equipment.

**Other Duties**

1. Oversees, monitors, and maintains employee certification, training, and work safety programs.

2. Provides input and review for the development and administration of new plant and system updates, and projects.
3. May attend meetings related to outside agencies.
4. Effectively represent District water treatment and distribution functions with the public, contractors, and other organizations as directed.
5. Prepares and executes plans for expansion, reduction, and shifting of system operations and functions.
6. Must have computer experience including Microsoft Office programs (Word, Excel and Outlook).
7. Performs related duties as assigned.

**Qualifications** – *Any combination of training and experience that would provide the required knowledge, skills and abilities is qualifying.*

**Knowledge of:**

1. Principals, methods, and practices used in water treatment and distribution including installation, operation, maintenance, and repair.
2. Chemical and quality testing of water conditions.
3. Principles, methods, and practices used in water treatment and plant maintenance repair.
4. Rules, regulations, and codes applicable to District water treatment and distribution functions.
5. District policies, rules, regulations, and procedures.
6. Work safety standards and requirements.
7. Principles of expenditure control purchasing.
8. Principles and practices of personnel administration and supervision.
9. Plan, organize, manage and administer the District water treatment and distribution functions.
10. Perform comprehensive administrative reviews of work activities, costs, staffing requirements, plant uses, and time requirements.
11. Ensure the proper maintenance, construction, operation, and repair of District treatment plant and distribution systems.
12. Assists with reviews of employee effectiveness and performance with General Manager.
13. Provides general coordination of water treatment and distribution activities with other District functions.
14. Prepares and carry out personnel training activities related to proper operation of District facilities and equipment.
15. Establish and maintain cooperative working relationships with co-workers, outside agencies, and the public.
16. Regular attendance and adherence to prescribed work schedule to conduct job responsibilities.
17. Perform other duties as assigned.

**Education and Experience** - *All levels must have education equivalent to graduation from high school.*

Broad and extensive work experience in supervision of a water treatment plant functions and operations, as well as operations, maintenance, and repair of water distribution system. Work experience must have included substantial experience with water treatment and distribution systems with at least four years in a supervisory capacity.

**Licenses and Certifications** – *Must possess a valid California Class C Driver's License issued by the California Department of Motor Vehicles with a satisfactory driving record. Possession of a valid California Class A Driver's License is preferred but not required.*

Possess a State of California Treatment Operator 3 certification and State of California Distribution Operator 3 certification issued by SWRCB.

### **Physical Requirements**

Must possess the knowledge and mobility to work in construction and various distribution and treatment system maintenance including pump stations, pump, motor, and electrical. Physical stamina to perform system and maintenance repair work, walk and work on uneven terrain, climb and descent ladders, ability to lift, carry, push, pull and reach materials and equipment weighting up to 80 pounds. Mobility to work in a standard water treatment plant, uses specialized test equipment hand and power tools instrumentation; ability to work in confined spaces and around machines; vision to read printed materials, charts and gauges and computer screens; and hearing, speech and English language skills to communicate successfully in person and over the telephone or other electronic devices.

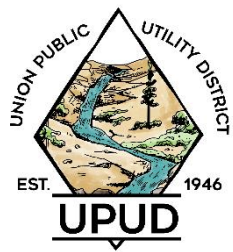
May be exposed to inclement weather conditions, including working in sun, water and snow. Work may include loud noises from equipment operation, odors, dust, and potentially toxic chemicals and conditions during the normal function of duties. Use of standard office equipment such as telephones, computer, copiers, and fax machines.

### **Work Environment**

Work both indoors (generally in a typical office or warehouse setting) and outdoors are required. While performing the duties of this job outdoors, the working conditions are of a varying degree, from snow to extreme heat. Additionally, incumbents in this position will have exposure to cleaning supplies, solvents, dusts, and other outdoor environmental elements. While performing the duties of this job indoors, the working conditions are those of a typical office environment, with temperatures occasionally too warm or too cold, moderate noise levels and under lighting conditions typical of an office. Travel between District facilities will be necessarily via District vehicle for District related duties and activities.

### **Additional Requirements**

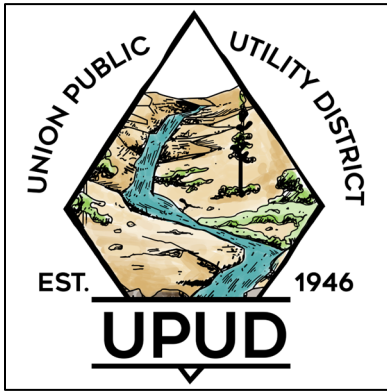
- 18 years of age.
- Eligible to work in the United States.
- Must be available for regular weekly on-call, emergency standby, and to be called back and work emergency overtime as required.



6.a.8.

Policy No. 2350

Job Description Policy, Water  
Distribution/Treatment Operator – New  
Policy



**Union Public Utility District**  
**POLICY TITLE: JOB DESCRIPTION**  
**WATER DISTRIBUTION/TREATMENT OPERATOR**  
**Trainee/I/II/III/CHIEF TREATMENT**  
**POLICY NUMBER: 2350**  
**REPORTS TO: Operations Manager**  
**Wage Schedule Range: 10/16/20/24/28**  
**Effective Date:**

*Classification specifications (job descriptions) are intended to present a descriptive summary of the range of duties and responsibilities performed by an incumbent in the classification. Specifications are intended to outline the minimum qualification for entry into the classification and not intended to reflect all duties and responsibilities of an incumbent in the classification.*

**Definition/Summary**

Under general supervision, learns and performs a variety of semi-skilled and skilled work in support of District water distribution and treatment systems. Have the ability to perform preventative and corrective maintenance and repair activities; assists in performing inspections, servicing and repair of valves, pumps and equipment; reads water meters and records consumptions; cleans, inspects, and repairs water meters; and perform other duties as assigned. Should also have experience in water treatment, operating and maintaining equipment used in the water treatment process. May assist water treatment operators with planned and schedule work and maintenance at water treatment plant.

**Supervision Received and Exercised**

Direct supervision, and training are given by the Chief Treatment Operator. General supervision, work assignments and leadership are provided by the Operations Manager. The Chief Treatment Operator will be assigned team leader responsibilities, as well as participate in evaluating the performance of staff working within the class.

**Class Characteristics:**

**Water Distribution/Treatment Operator in Training** is an entry-level position into this maintenance class series. Under close supervision, incumbents with basic with maintenance experience learn District systems and facilities, use of tools and equipment and a wide variety of practices and procedures.

**Water Distribution/Treatment Operator I** incumbents have the equivalent of one (1) years' experience performing maintenance work on water distribution and treatment systems.

**Water Distribution/Treatment Operator II** incumbents have additional experience and have or are in the process of obtaining other required certifications. As experience is gained, assignments become more varied and are performed with greater independence.

**Water Distribution/Treatment Operator III** must possess the required certifications and is capable of performing a wide variety of work to ensure that District systems and facilities are maintained in a safe and effective working condition.

**Chief Treatment Operator** is capable of performing a wide variety of work in a lead role capacity to ensure that District systems and facilities are maintained in a safe and effective working condition. This



level is distinguished from the Water Distribution/Treatment Operator III by time in service and in a lead role capacity.

### **Essential Duties and Responsibilities**

*Other duties may be assigned.*

1. Complete work orders initiated by office staff or assigned by supervisor, including disconnecting and reconnecting water service.
2. Respond to customer complaints and emergency calls for service regarding complaints for pressure issues and water quality.
3. Set up traffic control and safety equipment when using vehicles on a street or other roadway; and use safety equipment properly and observe all safety procedures as specified by the District.
4. Notify supervisor of the need for repair or additional maintenance as found during routine inspection and cleaning activities.
5. Ensure that adequate materials and supplies are available for maintenance and repair work.
6. Assist with contacting the public to inform them of activities and shutdowns; and explains applicable rules and regulations.
7. Mark the location of underground water lines in response to USA requests.
8. Locate, exhume, repair, and/or replace sections of water mains or laterals, or hydrants, regulating valves and connections as necessary.
9. Construct or assist in the construction of District facilities including pump, pressure stations, pipelines, laterals, valves, or other system components as directed.
10. With others, inspect underground water pipes and associated appurtenances to locate leaks, breaks on a scheduled preventative maintenance basis or as needed.
11. With others, preform taps, repair water service lines and other system components as directed.
12. Service and maintain mobile equipment in a clean and orderly condition; and make minor repairs as needed; ensure safe operating capability of rolling stock regularly used in the performance of maintenance duties; conduct periodic safety checks of equipment as required.
13. May individually inspect water tanks, and pressure stations on a scheduled basis; reads and records data; and performs servicing and repair of pumps, motors, valves, and other mechanical and electrical equipment.
14. Maintain maintenance warehouse in a safe and orderly fashion, in accordance with best management practices and safety regulations for storage of equipment, spare parts, chemicals, and the like.
15. Read water meters on assigned routes and records readings.
16. Inspect meters to ensure proper registration and reports on conditions such as malfunctioning and improperly installed meters and suspicious conditions.
17. Install, replace, and repair meters and boxes as needed.
18. Perform leak investigations, informs customers of results, make minor repairs in the field, or prepares work orders if needed.
19. May be expected to master computer or control applications related to the work.
20. Maintain accurate records of work performed.
21. May maintain external premises of facilities including use of herbicides for weed control, mowing weeds, painting, basic carpentry, and other tasks as assigned.
22. Establish and maintain an effective and cooperative working relationship with coworkers

through knowledge of work, personal and professional conduct, and good judgment.

23. Regular attendance and adherence to prescribed work schedule to conduct job responsibilities.
24. Perform related duties as assigned or required for the ongoing operation of the District's business.
25. Assists in the construction, maintenance, and/or repair of the District's distribution, treatment systems and associated facilities.
26. Operates various hand and power tools, including but not limited to jackhammer, pavement breakers, pick, shovel, various wrenches, air compressors, rodding and/or boring machines and pumps of various types.
27. Assists with the inspection and plant operational equipment and facilities as required; and reads and records data of pumps, chemical feed and other treatment and pumping equipment.
28. Assists with the maintenance of water treatment facilities.
29. Learns to properly collect water quality samples for laboratory testing.
30. Assists the Treatment Plant Operator with performance of preventive maintenance on a variety of treatment plant equipment.

### **Qualifications**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### **Knowledge of:**

1. Principles, practices, tools, equipment, and supplies required to maintain and repair water distribution and treatment systems.
2. Basic principles and practices of mobile equipment servicing and repair.
3. Basic safety practices related to the work, including confined space entry.
4. A variety of meters and meter reading equipment and their respective functions.
5. Basic knowledge of materials and equipment used in water service installation, maintenance, and operational practices of electrical motors, pumps, and circuitry.
6. Applicable laws, codes, and regulations, including District policies and regulations.
7. Techniques for providing a high level of customer service to public and District staff, in person and over the telephone.
8. Microsoft Office Suite programs for word processing and spreadsheets. Use of a variety of office equipment.
9. Standard business practices such as letter writing, report writing, preparing informational materials in visual formats.
10. English language usage, spelling, grammar, and punctuation.
11. Proper work safety standards.
12. Geography of the District and the location of District facilities.

### **Ability to:**

1. Perform skilled and semi-skilled work related to the installation, inspection, maintenance, and repair of underground water lines and pump stations.

2. Perform servicing and minor maintenance on a variety of stationary and mobile equipment.
3. Safely using hand and power tools related to the work and driving and operation of trucks and equipment including backhoe.
4. Respond effectively to emergency situations and troubleshooting such situations.
5. Reading meters and gauges efficiently and recording accurate consumption information and interpret data and/or results.
6. Read maps, manuals, and specifications.
7. Perform basic adjustments and troubleshooting for electrical motors and controls as assigned.
8. Prioritizing own work and using independent judgment within procedural guidelines.
9. Maintain accurate records of work performed.
10. Adapt to changing technologies and learn functionality of new equipment and systems.
11. Plan, coordinate, and organize work to meet deadlines with accuracy, thoroughness, and attention to detail.
12. Work independently and prioritize multiple tasks often under time constraints and with limited supervision.
13. Read, understand, and carry out written and oral directions in a clear, concise, and consistent manner.
14. Operate a computer for the effective operations including work processing, spreadsheet, e-mail, and internet.
15. Communicate clearly and concisely both orally and in writing with District staff, co-workers, consultants, and the public in one-to-one and group settings.
16. Perform other duties as assigned.

**Education and Experience:**

Any combination of education and experience which would likely provide the necessary knowledge and abilities is qualifying. All levels must have education equivalent to graduation from high school.

**Water Distribution/Treatment Operator In Training:** Within the first year of employment must obtain a California Water Treatment Operator Grade T1 certification and current California Water Distribution Operator Grade D1 issued by SWRCB.

**Water Distribution/Treatment Operator I:** One (1) year of experience in the operation and maintenance of a water treatment/distribution system or in the electrical, plumbing or construction related fields. Current California Water Treatment Operator Grade T1 certification and current California Water Distribution Operator Grade D1 issued by SWRCB.

**Water Distribution/Treatment Operator II:** Three (3) years of semi-skilled maintenance experience, including two (2) years in water distribution and treatment at a level equivalent to that of **Water Distribution/Treatment Operator I**. In addition to the qualifications above, the Water Treatment Operator Grade 2 has current California Water Treatment Operator Grade T2 certification and current California Water Distribution Operator Grade D2 certification issued by SWRCB.

**Water Distribution/Treatment Operator III:** Six (6) years of skilled maintenance experience, including three (3) years in water distribution at a level equivalent to that of Distribution Worker II. In addition to the qualifications above, the Water Treatment Operator Grade 3 has current California Water Treatment Operator Grade T3 certification and current California Water Distribution Operator Grade D3 certification issued by SWRCB.

**Chief Treatment Operator:** Nine (9) years of skilled maintenance experience, including four (4) years in

water distribution and treatment at a level equivalent to that of **Water Distribution/Treatment Operator III**. Must have current California Water Treatment Grade T3 certification and current California Water Distribution Operator Grade D3 certification issued by SWRCB.

*Operators must complete the designated number of contact hours (i.e., continuing education/training requirements) as determined by the California State Water Resources Control Board (SWRCB) to maintain the required certifications.*

### **Certificates, Licenses, Registrations**

All levels must possess a valid California Class C driver's license issued by the California Department of Motor Vehicles with a satisfactory driving record. Possession of a valid California Class A Driver's License is preferred but not required.

**Water Distribution/Treatment Operator I:** Possess a State of California Distribution Operator D1 and Treatment Operator T1 certificate, with the ability to obtain Treatment Grade 2 certificate within 1 year and Distribution Grade 2 within 2 years. Incumbents may also be required to obtain a backhoe certification within 1 year of employment.

**Water Distribution/Treatment Operator II:** Possess a State of California Distribution Operator D2 and Treatment Operator T2 certificate, with the ability to obtain a Treatment Grade 3 certificate within 2 years. Incumbents may also be required to obtain a backhoe certification within 1 year of employment.

**Water Distribution/Treatment Operator III:** Possess a State of California Distribution Operator D3 and Treatment Operator T3 certificate. Incumbents may also be required to obtain a backhoe certification within 1 year of employment.

**Chief Treatment Operator:** Possess a State of California Distribution Operator D3 and Treatment Operator T3 certificate, with the ability to obtain Distribution Grade 4 and Treatment Operator T4 certificate. Incumbents may also be required to obtain a backhoe certification within 1 year of employment, and possess additional certification or endorsement, i.e., Class A Driver's License, Qualified Applicators License for Pesticide Spraying, Back Flow and Water Use Efficiency Practitioner.

### **Physical Requirements:**

1. Must possess the knowledge and mobility to work in construction and various distribution and treatment system maintenance. Physical stamina to perform system and maintenance repair work, walk and work on uneven terrain, climb and descent ladders, ability to lift, carry, push, pull and reach materials and equipment weighting up to 80 pounds.
2. Mobility to work in a standard water treatment plant, uses specialized test equipment hand and power tools instrumentation; ability to work in confined spaces and around machines; vision to read printed materials, charts and gauges and computer screens; and hearing, speech, and English language skills to communicate successfully in person and over the telephone or other electronic devices.
3. May be exposed to inclement weather conditions, including working in sun, water, and snow. Work may include loud noises from equipment operation, odors, dust, and potentially toxic chemicals and conditions during the normal function of duties. Use of standard office equipment such as telephones, computer, copiers, and fax machines.

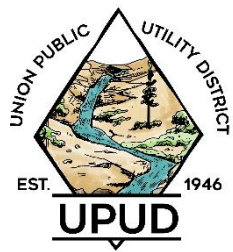
### **Work Environment**

Work both indoors (generally in a typical office or warehouse setting) and outdoors are required. While performing the duties of this job outdoors, the working conditions are of a varying degree, from snow to

extreme heat. Additionally, incumbents in this position will have exposure to cleaning supplies, solvents, dusts, and other outdoor environmental elements. While performing the duties of this job indoors, the working conditions are those of a typical office environment, with temperatures occasionally too warm or too cold, moderate noise levels and under lighting conditions typical of an office. Travel between District facilities will be necessarily via District vehicle for District related duties and activities.

**Additional Requirements**

1. 18 years of age.
2. Eligible to work in the United States.
3. Must be available for regular weekly on-call, emergency standby, and to be called back and work emergency overtime as required.



6. a. 8.

Policy No. 2300

Job Description Policy, District Manager-  
Current Policy

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# Union Public Utility District

## **POLICY HANDBOOK**

**POLICY TITLE:** Job Description – District Manager  
**POLICY NUMBER:** 2300  
**DATE ADOPTED:** March 21, 2007

Department: Field and Office Staff  
Salary Range: See Salary Schedule  
Reports to: Board of Directors  
Employee Status: Full-time/Hourly/Benefits/Retirement

### SUMMARY:

#### ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Assigns daily duties to field personnel.
- Insures a safe and healthy workplace.
- Operates under UPUD guidelines and the guidelines of the State of California
- Responsible for planning long term goals, short term goals, annual budget and hiring of all personnel.
- The District Manager is responsible for training in the treatment and distribution systems.
- Any other duties as assigned by the Board of Directors.
- Oversee all District Personnel matters.

#### QUALIFICATIONS:

- Posses a valid California Driver's License.
- Posses a valid grade Treatment-2 and Distribution-2 or higher water certification.
- Experience operating water treatment plant facility for a minimum of one year.
- Physically able to perform all duties required to operate water treatment plant.
- At least 5 years management experience.
- Provide customer service

#### RECORDS:

Must maintain accurate records as required by the Department of Health Services. Proficiency in mathematics is a requirement, including use of a calculator.

#### HEAVY LIFTING:

In conjunction with other employees and equipment, field personnel must be able to change pumps, valves, fire hydrants, etc. weighing from 20 – 1000 pounds. Lift and carry up to eighty pounds, such as small pumps, motors, vault covers, meters, meter boxes and tools.

**WALKING:**

Must be able to walk short distances, including up and down embankments.

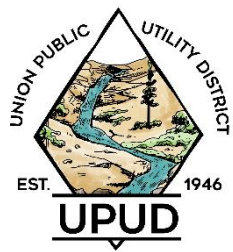
**CLIMBING:**

Must be able to climb in and out of ditches, in and out of vaults, up and down ladders. This includes climbing up and down tank ladders.

**BENDING AND STOOPING:**

Must be able to bend, stoop and hook up equipment to District vehicles. Bending and stooping is required in line replacement and repair.





6. a. 8.

Policy No. 2305

Job Description Policy, Office Manager –  
Current Policy

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# Union Public Utility District

## POLICY HANDBOOK

**POLICY TITLE:** Job Description – Office Manager  
**POLICY NUMBER:** 2305  
**DATE ADOPTED:** November 19, 2008

Department: Office Staff  
Salary Range: See Salary Schedule  
Reports to: Board of Directors  
Employee Status: Full-time\*/Exempt/Benefits/Retirement (\*Regular hours are 8:30 a.m. to 5:00 p.m., Monday thru Friday. Subject to change as needed to meet the needs of the District. Must be willing to work additional hours and attend meetings outside of regular working hours. Time coordinated with other office personnel to maintain established office hours.)

### SUMMARY:

Under the direction of the Board of Directors, the Office Manager provides assistance to the Board of Directors and District staff providing a variety of routine and complex clerical, accounting, secretarial, administrative and public duties involved in compiling, reporting and keeping official records of the District. General knowledge of public administration legal practices, requiring the ability to manage and prioritize a number of tasks while meeting deadlines is essential. The Office Manager must present a professional demeanor and an organized office environment. He/She may exercise supervision over clerical, temporary or other staff as assigned.

### ESSENTIAL DUTIES AND RESPONSIBILITIES:

Under the direction of the Board of Directors, the Office Manager shall perform all administrative duties and any other duties as assigned.

### Office Manager

- Responsible for the hiring of office staff in conjunction with the Personnel Committee.
- Supervision of assigned clerical personnel, independent contractors and consultants.
- Provide customer service.
- Prepare financial, operational and regulatory agency reports.
- Coordinate activities with outside agencies.
- Develop and prepare budget and financial operations reports for Board review.
- Responsible for all banking activities including deposits, transfers and maintaining efficient fiscal practices.
- Compose, type and edit a variety of correspondence, reports, financial claims and other material requiring judgment of content, accuracy and completeness, involving local, state and federal agencies within identified deadlines and/or coordinate with the Board of Directors or District Manager. Must be able to independently take care of administrative detail and compose correspondence from general directions.
- Monitor customer billing and assist the Customer Service Representative, as necessary.
- Update the Board of Directors and District Manager of current correspondence, opportunities and regulatory policies.

- Maintain personnel records of employees and perform Human Resource Duties, as required.
- Develop and implement procedures for use by office staff.
- Perform annual performance appraisals for office staff and make recommendations to the Board of Directors for salary increases.
- Preparation of policies and procedures.
- Maintain confidential files and exercise mature judgment in matters of a confidential nature; develop effective working relationships with other employees and district contacts.
- Record liens, deeds, easements and other legal documents.
- Acts as the District's Notary Public and maintains active status as such.

#### Clerk to the Board

- Prepare data for and attend all Board and Committee meetings, and serve as the custodian of official records and public documents.
- Work closely with the Board of Directors and staff in the coordination and administration of the activities of the District.
- Assists the Board of Directors in the District's public relations activities; schedules appointments, provides information to callers, composes and types correspondence and technical reports.
- Provides assistance to the Board of Directors in carrying out rules, regulations and policies of the District
- Adheres to the requirements of the Brown Act, Robert's Rules of Order, the Public Utilities Code, the Water Code and the Government Code.
- Maintains permanent records of the official activities of the District.
- Prepares and distributes ordinances, resolutions and documents resulting from Board actions.
- Assembles, prepares and distributes meeting agendas and supporting data for Board and Committee meetings.
- Attends Board and Committee meetings, presents agenda items, takes meeting notes and prepares Minutes and reports of the proceedings.
- Coordinates Committee meetings as necessary.
- Informs the public of the procedures and legal requirements for the presentation of items to the Board.
- Coordinates Board of Directors Election activities with the County.

#### QUALIFICATIONS:

##### Knowledge of:

- Procedures and rules for conducting meetings.
- Legal requirements governing Board meetings, posting of Board notices and maintenance of official Board records.
- Office methods, including filing systems, document preparation and the operation of office equipment.
- Operation and application of Microsoft Word, Excel, the internet and email, utility billing software, General Ledger, Accounts Payable and Accounts Receivable.
- Correct application and usage of the English language, including spelling, grammar and punctuation.
- Safe work practices.

##### Ability to:

- Exercise sound judgment in performing a variety of administrative details for the Board of Directors and District staff.
- Research and organize Board Minutes, reports and back-up material.
- Establish and maintain an indexing system.
- Process documents in accordance with codes and requirements.
- Interpret and apply a wide variety of laws, rules, policies and procedures.

- Prepare accurate Minutes and reports from handwritten notes and recorded media.
- Type accurately at a rate of at least 50 words per minute.
- Use a variety of office equipment, including but not limited to, copy machine, FAX machine, adding machine, handheld meter reading equipment, telephones and two way radio.
- Understand and carry out oral and written directions.
- Establish and maintain cooperative and effective working relationships with those contacted in the course of the work.

#### EXPERIENCE:

At least three years in an administrative management position, including extensive public contact experience. Combined training and experience in business administration, public administration or a related field is helpful. Experience working in a public agency is also helpful.

#### LANGUAGE SKILLS:

Ability to read, understand, analyze and interpret common technical journals, financial reports, legal documents, operating and maintenance instructions, and procedure manuals. Ability to respond to common inquires or complaints from customers, employees, regulatory agencies, or members of the business community. The Office Manager must possess the ability to handle stressful situations and adhere to deadlines, write routine reports and correspondence, as well as to effectively present information in many forums.

#### MATHEMATICAL SKILLS:

Ability to calculate figures such as water flows, discounts, interest, percentages, etc.

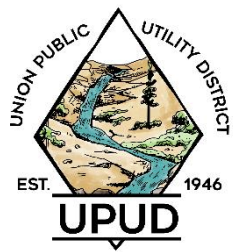
#### CERTIFICATES, LICENSES, REGISTRATIONS:

A high school diploma or general education degree (GED). Maintain active certification as a California Notary Public. Possess a valid California Driver's License, have a satisfactory driving record and be insurable by the District to operate District vehicles.

#### PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to sit for an extended period of time at a computer workstation; use hands to finger, handle or feel; speak and listen. The employee frequently is required to reach with hands and arms. The employee is regularly required to stand, stoop and walk. The employee may be required to lift and/or move up to 35 pounds. Specific vision abilities required by this job include close vision and distance vision. The majority of the job activities are performed indoors in a temperature controlled environment. There is a minimal amount of exposure to noise generated from the operation of office equipment.



6. a. 8.

Policy No. 2310

Job Description Policy, Water Treatment  
Plant Operator (TIII) – Current Policy

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# Union Public Utility District

## **POLICY HANDBOOK**

**POLICY TITLE:** Job Description – Water Treatment Plant Operator: (TIII)  
**POLICY NUMBER:** 2310  
**DATE ADOPTED:** November 19, 2008

Department: Treatment Plant  
Salary Range: See Salary Schedule  
Reports to: District Manager  
Employee Status: Full-time/Hourly/Benefits/Retirement

### SUMMARY:

The Water Treatment Plant Operator operates the District's facilities within the guidelines established by the State of California Department of Public Health.

It is the duty and responsibility of the Operator to protect the District's investment by properly maintaining the facilities and properties owned by the District. The Operator has a responsibility to the public to create a good public image through the appearance of buildings, grounds, and equipment at the treatment plant facility. The Water Treatment Plant Operator receives general supervision from the District Manager and will perform any other duties as assigned.

### ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Operate the water treatment plant at peak efficiency at all times.
- Maintain treatment facilities, buildings, grounds and equipment in operable condition and appearance. Routing inspections, maintenance and repairs are a must.
- Prepares and maintains pertinent records covering all phases of treatment, operation and maintenance. Records all necessary data and submits such data to the California Department of Public Health and the District Engineer.
- Collects samples as required by the Department of Public Health for submission to the District's independent laboratory for analysis. Performs, analyzes and records test results to adjust plant operation as necessary to yield high quality water.
- Work with and supervise Operator in Training (OIT) for training purposes.

### QUALIFICATIONS:

- Must possess Class III Operator Certificate, as required by the Department of Public Health. If hired as an Operator in Training, must be preparing for such a certificate, within the guidelines of the Department of Public Health. Must also be willing to obtain a Distribution 2 Certificate.
- Possess a valid California Driver's License.
- 2 Years of Full Time Experience operating a water treatment plant or equivalent.
- Provide customer service.

**RECORDS:**

Must maintain accurate records, as directed by the Manager, and as required by the Department of Public Health. Proficiency in mathematics is a requirement, including use of a calculator.

**HEAVY LIFTING:**

In conjunction with other employees and equipment, must be able to change pumps, valves, fire hydrants, etc. weighing from 20 – 1000 pounds. Lift and carry up to eighty pounds, such as small pumps, motors, vault covers, meters, meter boxes and tools.

**WALKING:**

Must be able to walk short distances, including up and down embankments.

**CLIMBING:**

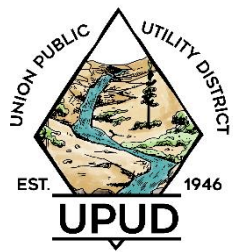
Must be able to climb in and out of ditches, in and out of vaults, up and down ladders. This includes climbing up and down tank ladders.

**BENDING AND STOOPING:**

Must be able to bend, stoop and hook up equipment to District vehicles. Bending and stooping is required in line replacement and repair.

**MAINTENANCE WORK:**

Mowing weeds, the use of shovels and rakes. Painting and repairing buildings, general maintenance of grounds at the treatment plant and distribution system, including use of herbicides for weed control.



6. a. 8.

Policy No. 2315

Job Description Policy, Treatment Plant  
Operator in Training (OIT): (TI or TII)–  
Current Policy



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# Union Public Utility District

## **POLICY HANDBOOK**

**POLICY TITLE:** Job Description – Treatment Plant Operator in Training (OIT): (TI or TII)  
**POLICY NUMBER:** 2315  
**DATE ADOPTED:** November 19, 2008

Department: Treatment Plant  
Salary Range: See Salary Schedule  
Reports to: District Manager  
Employee Status: Part-time/Hourly / Already works full-time as a Transmission & Distribution Employee

### SUMMARY:

An Operator in Training will operate with or without direct supervision and perform tasks that include maintenance and repair of buildings, grounds, equipment, water lines and facilities, and any other duties as assigned.

### ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Assist the Operator in all phases of Water Treatment.
- Maintain treatment facilities, buildings, grounds and equipment in operable condition and appearance. Routing inspections, maintenance and repairs are a must.
- Collects samples as required by the Department of Public Health for submission to the District's independent laboratory for analysis. Performs, analyzes and records test results to adjust plant operation as necessary to yield high quality water.

### QUALIFICATIONS:

- Must possess Class I or II Treatment Plant Operator Certificate, or as required by the Department of Public Health. If working as an Operator in Training, must be preparing for such a certificate, within the guidelines of the Department of Public Health. Must also be willing to obtain a Distribution 2 Certificate.
- Possess a valid California Driver's License.
- Provide customer service.

### RECORDS:

Must maintain accurate records, as directed by the Manager or Treatment Plant Operator, as required by the Department of Public Health. Proficiency in mathematics is a requirement, including use of a calculator.

### HEAVY LIFTING:

In conjunction with other employees and equipment, must be able to change pumps, valves, fire hydrants, etc. weighing from 20 – 1000 pounds. Lift and carry up to eighty pounds, such as small pumps, motors, vault covers, meters, meter boxes and tools.

### WALKING:

Must be able to walk short distances, including up and down embankments.

**CLIMBING:**

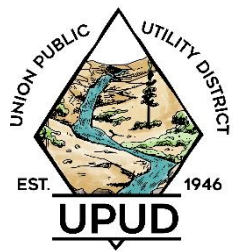
Must be able to climb in and out of ditches, in and out of vaults, up and down ladders. This includes climbing up and down tank ladders.

**BENDING AND STOOPING:**

Must be able to bend, stoop and hook up equipment to District vehicles. Bending and stooping is required in line replacement and repair.

**MAINTENANCE WORK:**

Mowing weeds, the use of shovels and rakes. Painting and repairing buildings, general maintenance of grounds at the treatment plant and distribution system, including use of herbicides for weed control.



6. a. 8.

Policy No. 2320

Job Description Policy, Transmission &  
Distribution: (DI, DII or DIII)- Current  
Policy

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# Union Public Utility District

## **POLICY HANDBOOK**

**POLICY TITLE:** Job Description – Transmission & Distribution: (DI, DII or DIII)  
**POLICY NUMBER:** 2320  
**DATE ADOPTED:** November 19, 2008

Department: Transmission & Distribution  
Salary Range: See Salary Schedule  
Reports to: District Manager  
Employee Status: Full-time/Hourly/Benefits/Retirement

### SUMMARY:

The Transmission & Distribution Staff are responsible for maintaining all District lines, equipment and property and any other duties as assigned.

### ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Maintain District lines, meters, equipment, etc.
- Maintain District property.
- Monthly Meter Reading.

### QUALIFICATIONS:

- Must possess a valid California Driver's License.
- Experience with hand tools and equipment operation.
- Provide customer service.
- Must be willing to obtain a Treatment 1 Operator Certificate.

### PHYSICAL ABILITIES REQUIRED:

### RECORDS:

Must maintain accurate records, as directed by the Manager. Proficiency in mathematics is a requirement, including use of a calculator.

### HEAVY LIFTING:

In conjunction with other employees and equipment, must be able to change pumps, valves, fire hydrants, etc. weighing from 20 – 1000 pounds. Lift and carry up to eighty pounds, such as small pumps, motors, vault covers, meters, meter boxes and tools.

### WALKING:

Must be able to walk short distances, including up and down embankments.

**CLIMBING:**

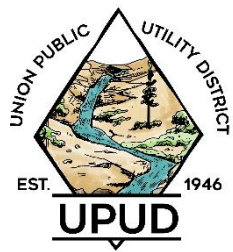
Must be able to climb in and out of ditches, in and out of vaults, up and down ladders. This includes climbing up and down tank ladders.

**BENDING AND STOOPING:**

Must be able to bend, stoop and hook up equipment to District vehicles. Bending and stooping is required in line replacement and repair.

**MAINTENANCE WORK:**

Mowing weeds, the use of shovels and rakes. Painting and repairing buildings, general maintenance of grounds at the treatment plant and distribution system, including use of herbicides for weed control.



6. a. 8.

Policy No. 2325

Job Description Policy, Transmission &  
Distribution Operator in Training (OIT)-  
Current Policy

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# Union Public Utility District

## **POLICY HANDBOOK**

**POLICY TITLE:** Job Description – Transmission & Distribution Operator in Training (OIT):  
**POLICY NUMBER:** 2325  
**DATE ADOPTED:** November 19, 2008

Department: Transmission & Distribution  
Salary Range: See Salary Schedule  
Reports to: District Manager  
Employee Status: Full-time/Hourly/Benefits/Retirement

### SUMMARY:

The Transmission & Distribution Staff are responsible for maintaining all District lines, equipment and property and any other duties as assigned.

### ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Maintain District lines, meters, equipment, etc.
- Maintain District property.
- Monthly Meter Reading.

### QUALIFICATIONS:

- Must possess a valid California Driver's License.
- Experience with hand tools and equipment operation.
- Provide customer service.
- Must be willing to obtain a Distribution 1 Certificate.

### PHYSICAL ABILITIES REQUIRED:

#### RECORDS:

Must maintain accurate records, as directed by the Manager. Proficiency in mathematics is a requirement, including use of a calculator.

#### HEAVY LIFTING:

In conjunction with other employees and equipment, must be able to change pumps, valves, fire hydrants, etc. weighing from 20 – 1000 pounds. Lift and carry up to eighty pounds, such as small pumps, motors, vault covers, meters, meter boxes and tools.

#### WALKING:

Must be able to walk short distances, including up and down embankments.

**CLIMBING:**

Must be able to climb in and out of ditches, in and out of vaults, up and down ladders. This includes climbing up and down tank ladders.

**BENDING AND STOOPING:**

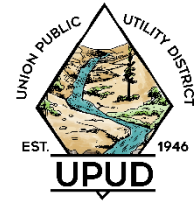
Must be able to bend, stoop and hook up equipment to District vehicles. Bending and stooping is required in line replacement and repair.

**MAINTENANCE WORK:**

Mowing weeds, the use of shovels and rakes. Painting and repairing buildings, general maintenance of grounds at the treatment plant and distribution system, including use of herbicides for weed control.



# Agenda Item



**DATE:** April 19, 2023

**TO:** UPUD Board of Directors

**FROM:** Jessica Self, General Manager

**SUBJECT:** Discussion/Action Adopting Disconnection of Water Service Policy Updates

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## **RECOMMENDED ACTION:**

Motion: \_\_\_\_\_ / \_\_\_\_\_ adopting Resolution No. 2023-003 Disconnection of Water Service Policy Updates.

## **SUMMARY:**

California water agencies are required to implement policies consistent to SB 998 (Dodd) Discontinuation of Residential Water Service: Urban and Community Water Systems. This legislation requires utility agencies to change policies and procedures regarding delinquent account notifications, fee assignments, discontinuation, and restoration of service.

## **BACKGROUND INFORMATION:**

This bill applies to all urban and community water systems, public or private, that provide water to more than 200 service connections.

The timing of the legislation went into effect at the same time the historic COVID-19 pandemic occurred. In March of 2020, Governor Newsome signed an executive order that restricted water shutoffs to homes and small businesses while the state responded to the COVID-19 pandemic. The order protected consumers who were not able to pay for their water service. As a result, SB 998 was not applicable for water agencies.

Once the moratorium for water shutoffs was lifted in 2022, water agencies slowly moved back into implementing shut off policies that meet SB 998 requirements. UPUD has developed updates to our water shutoff policy and notice for customers as we begin the process of implementing water shutoffs. In February 2023, staff brought the Notice of Disconnection of Water Service for Non-Payment to the board. This month, Staff are asking the board to adopt the UPUD Policy for Disconnection of Water Service for Nonpayment. Once adopted, this policy will replace sections 15.07, 15.08, 15.10, 15.11, and 15.12. Section 15.09 "Delinquent Charges Constituting Lien on Real Property" remain the same.

**FINANCIAL CONSIDERATIONS:**

None at this time.

*Attachments:                      Resolution No. 2023-003 Adopting Updates to the Disconnection of Water Service Policy  
Current UPUD Water System Ordinance sections 15.07 – 15.08  
Updated Disconnection of Water Service Policy*

**RESOLUTION NO. 2023-003**

**UNION PUBLIC UTILITY DISTRICT  
BOARD OF DIRECTORS**

**ADOPTING UPDATES TO THE UPUD  
DISCONNECTION OF WATER SERVICE POLICY**

**WHEREAS**, The Board of Directors of the Union Public Utility District are required to implement policies consistent to SB 998 Discontinuation of Residential Water Service: Urban and Community Water Systems; and

**WHEREAS**, the Board has passed policies related to delinquent accounts and the disconnection of water service FOR delinquencies in UPUD's Water System Ordinance, Adopted November 16, 1994, Billing, Chapter 15: Billing - Delinquent Accounts – Service Discontinuance.

**WHEREAS**, the Board must implement changes to portions of its delinquency policy; and

**WHEREAS**, for the purpose of updating said policy, amendments to the current policy have been considered by the Board.

**NOW, THEREFORE, BE IT RESOLVED** the Board of Directors of the Union Public Utility District hereby amend Chapter 15 of the Districts Water System Ordinance to incorporate the Disconnection of Water Service Policy within sections 15.07 and 15.08.

**BE IT FURTHER RESOLVED** that the remainder of the Water System Ordinance adopted September 15, 2005, and thereafter amended shall remain in full force and effect.

**PASSED, APPROVED, AND ADOPTED** this 19<sup>th</sup> day of April, 2023.

AYES:

NOES:

ABSENT:

ABSTAIN:

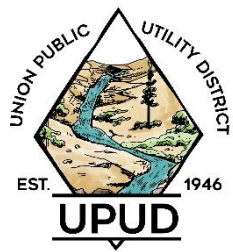
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Eric Bottomley, President  
Union Public Utility District

I hereby certify that the within and foregoing is a full, true, and correct copy of the Resolution which was duly passed and adopted at a regular meeting of the Board of Directors of the Union Public Utility District on the 15<sup>th</sup> day of March 2023.

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Elaine M Urruty  
Clerk to the Board



6.b.

Policy No. 15.07-15.08

Disconnection of Residential Water  
Service for Non-Payment Policy –  
Current Policy

**15.07 Delinquent Accounts - Service Discontinuance - When.** *(This section amended 6/15/05, Ord. 2005-01)* All bills are delinquent twenty days after the date stamped on the bill, and if not paid on or before the delinquent date, shall be charged a \$10 late fee. The District is not responsible for bills that are not received in the mail and a late fee can be reversed by staff as a courtesy, one time only. It is the responsibility of the customer to ensure that payment is received by the due date every month. The District may commence proceedings to terminate water service for non-payment of monthly charges unless non-payment occurs in any of the following situations:

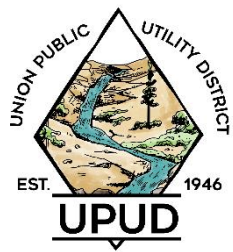
- 15.07.1 During the pendency of any investigation by the District of a customer dispute or complaint;
- 15.07.2 When a customer has been granted an extension of the period for payment or a bill; or,
- 15.07.3 On the certification of a licensed physician and surgeon that to do so will be life threatening to the customer and the customer is financially unable to pay for service within the normal payment period and is willing to enter into an amortization agreement with the District.

The District may commence proceedings to terminate water service on or after the 35<sup>th</sup> day a bill becomes delinquent for non-payment. Before terminating residential water service for non-payment, the District shall first give notice of the delinquency and impending termination at least 15 days prior to the proposed termination, by means of notice mailed, postage prepaid, to the customer to whom the service is billed.

The District shall make a reasonable, good faith effort to contact an adult person residing at the premises by telephone, or personal contact, at least 48 hours prior to any termination of service, except that, whenever telephone or personal contact cannot be accomplished, the District shall give, by mail, in person, or by posting in a conspicuous location at the premises, a notice of termination of service, at least 48 hours prior to termination.

**15.08 Delinquent Accounts – Service Discontinuance - Several Locations.** If a customer receives service at more than one service locations and the bill for any one of that customer's

accounts becomes delinquent and service is discontinued, service at all other locations may also be discontinued.



6.b.

Policy No. 15.07-15.08

Disconnection of Residential Water  
Service for Non-Payment Policy –  
Updated Policy

**POLICY AND PROCEDURE**  
**UNION PUBLIC UTILITY DISTRICT**

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DATE APPROVED	MANUAL	POLICY NO. 15.07-15.08
APPROVED BY: Board of Directors	POLICY TITLE <b>Disconnection of Residential Water Service for Non-Payment</b>	Page 1-9

**15.07 Delinquent Accounts – Service Discontinuance - When**

**General Provisions**

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

b. Customer Responsibility. Under applicable District ordinances, resolutions, policies, and procedures, bills for water service are rendered to each customer on a monthly basis, and are due and payable upon presentation. Water service bills become delinquent if not paid within 30 days from the date on the bill. It is the customer’s responsibility to ensure that payments are received at the District office in a timely manner. Payment may be made at the District office, online, by phone, or to the address for remittance of mailed payments.

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

d. Contact Telephone Number. The District’s Customer Service Department can be reached at 209-728-3651 for assistance concerning the payment of water bills and to discuss options for stopping disconnection of residential service for nonpayment.

**Disconnection of Residential Water Service for Nonpayment**

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



## **POLICY AND PROCEDURE**

### **UNION PUBLIC UTILITY DISTRICT**

f. Reminder Notice. An account that remains unpaid by the close of business 30 calendar days after the date of issuance of the water or wastewater bill is considered delinquent. The District shall apply a \$10 late fee to the delinquent amount and mail a reminder notice to the customer explaining the delinquent amount and providing a due date that is fifteen (15) days from the date printed on the notice.

g. 15-Day Notice. Not less than 15 days before disconnection of residential service for nonpayment, the District shall contact the customer named on the account by telephone or written notice.

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

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

1. The customer's name and address.
2. The amount of the delinquency, including an itemization of any late payment penalties and interest to be applied to the delinquent charges.
3. The date and time by which payment or arrangement for payment must be made in order to avoid disconnection of water service.
4. A description of the process to apply for an extension of time to pay the delinquent charges.
5. A description of the procedure by which the customer may petition for bill review and appeal or initiate a complaint or request an investigation concerning the service or charges.
6. A description of the procedure by which the customer may request a deferred, reduced, or alternative payment schedule, including an amortization of the delinquent residential service charges, consistent with this Policy.
7. A description of the procedure for the customer to obtain information on the availability of financial assistance, including private, local, state, or federal sources, if applicable.
8. The District's telephone number, business address, and hours of

## **POLICY AND PROCEDURE**

### **UNION PUBLIC UTILITY DISTRICT**

operation of a customer service representative who can provide additional information or institute arrangements for payment.

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

h. 48-hour Posting Notice. The District shall make a reasonable, good faith effort to contact an adult person residing at the premises of the customer by telephone or in person at least 48 hours prior to any termination of service except that whenever telephone or personal contact cannot be accomplished, the District shall give, by mail or by posting in a conspicuous location at the premises, a notice of termination of service, at least 48 hours prior to termination. This notice of termination of service shall include all of the following information:

i. The customer's address.

ii. The amount of the delinquency, including an itemization of any late payment penalties and interest to be applied on any delinquent charges.

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

iv. The procedure for the customer to obtain information on the availability of financial assistance, including private, local, state, or federal sources, if applicable.

v. The District's telephone number, business address, and hours of operation of a customer service representative who can provide additional information or institute arrangements for payment.

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

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

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

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

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

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

## **POLICY AND PROCEDURE**

### **UNION PUBLIC UTILITY DISTRICT**

of a bill.

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

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

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

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

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

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

#### **Alternative Payment Arrangements**

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

i. Amortization of the unpaid balance;

ii. Participation in an alternative payment schedule;

iii. A partial or full reduction of the unpaid balance, financed without additional charges to other ratepayers; or

iv. Temporary deferral of payment.

## **POLICY AND PROCEDURE**

### **UNION PUBLIC UTILITY DISTRICT**

(Collectively “Payment Arrangements.”)

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

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

#### **Disconnection After Failure to Comply with Alternative Payment Arrangements**

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

i. The customer fails to comply with the Payment Arrangement for 60 days or more.

ii. While undertaking a Payment Arrangement, the customer does not pay his or her current residential service charges for 60 days or more.

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

i. The customer’s name and address.

ii. Notice of the customer’s noncompliance with the Payment Arrangement.

iii. The Payment Arrangement or other conditions the customer must satisfy

## **POLICY AND PROCEDURE**

### **UNION PUBLIC UTILITY DISTRICT**

in order to avoid termination.

iv. The District's telephone number, business address, and hours of operation of a customer service representative of the District who can provide additional information.

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

#### **15.08 Delinquent Accounts – Service Discontinuance – Several Locations**

##### **Disconnection in Master Meter Landlord-Tenant Situations**

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

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

u. Service to Occupants. The District is not required to make service available to the residential occupants unless each residential occupant agrees to the terms and conditions of District water service and meets the requirements of law and the District's ordinances, rules, regulations, and policies. However, if one or more of the residential occupants are willing and able to assume responsibility for the subsequent charges to the account to the satisfaction of the District, or if there is a physical means legally available to the District of selectively terminating service to those residential occupants who have not met the requirements of the District's ordinances, rules, regulations, and policies, the District shall make service available to those residential occupants who have met those requirements.

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

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

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

## **POLICY AND PROCEDURE**

### **UNION PUBLIC UTILITY DISTRICT**

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

#### **Additional Considerations for Financial Hardship**

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

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

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

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

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

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

z. Residential Customers who are 65 years of age or older, or who are dependent adults as defined in Welfare and Institutions Code section 15610.23 shall be notified that they may request that the District notify a designated third person when the Customer's account is past due and subject to termination.

#### **Procedure to Contest or Appeal a Bill**

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

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

## **POLICY AND PROCEDURE**

### **UNION PUBLIC UTILITY DISTRICT**

bb. 15-Day Notice Appeal. In addition to the appeal rights under subsection (a), above, a customer who receives a 15-Day Notice described in Section 2(c) of this Policy may request an appeal or review of the bill to which the notice relates within five business days of the date of the notice. However, no such appeal or review rights shall apply to any bill for which an appeal or request for review under subsection (a) above, has been made. Any appeal or request for review under this subsection must be in writing and must include documentation supporting the appeal or the reason for the review. The request for an appeal must be delivered to the District's office within the five-day period. For so long as the customer's appeal and any resulting investigation is pending, the District cannot disconnect water service to the customer.

cc. Appeal Process.

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

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

iii. If the water charges in question are determined to be correct, the water charges are due and payable within three business days after receipt of the Customer Service Manager's decision. At the time the decision is rendered, the customer will be advised of the right to further appeal to the General Manager within 30 days of the date the account becomes delinquent, or within 10 days after receipt of the denial from the Customer Service Manager, whichever is later. The General Manager will issue a written determination within 15 days. If the General Manager denies the appeal, the customer may appeal before the District's Board of Directors. Any such appeal must be filed in writing within 10 business days after receipt of the General Manager's decision. The appeal hearing will occur at the next regular meeting of the District's Board of Directors, unless the customer and General Manager, or his or her designee, agree to a later date.

iv. If the customer does not timely appeal to the District's Board of Directors, the water charges in question shall be immediately due and payable. In the event the charges are not paid in full within 60 calendar days after the original billing date, then the

## **POLICY AND PROCEDURE**

### **UNION PUBLIC UTILITY DISTRICT**

District shall provide customer with the 15-Day Notice in accordance with Section 2(c), above, and may disconnect water service to the customer's property if the outstanding bill is not timely paid.

v. When a hearing before the Board of Directors is requested, the customer will be required to personally appear before the Board and present supporting material and reasons as to why the water charges on the bill in question are not accurate. The Board shall evaluate the evidence presented by the customer, as well as the information on file with the District concerning the water charges in question (including the General Manager's/designee's decision) and any staff presentation, and render a decision as to the accuracy of the charges. The Board's decision shall be final and binding.

vi. If the Board finds that the water service charges in question are incorrect, the customer will be invoiced for the revised charges. If the revised charges remain unpaid for more than 60 calendar days after the corrected invoice is provided, water service will be disconnected, on the next regular working day after expiration of expiration of that period. The District shall provide the customer with the 15-Day Notice in accordance with Section 2(c), above.

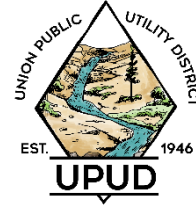
vii. If the water service charges in question are determined to be correct, they shall be due and payable within three business days after the date of the decision of the Board. In the event the charges are not paid in full within 45 calendar days after the original billing date, then the District shall provide with the 15-Day Notice in accordance with Section 2(c), above, and may disconnect water service to the customer's property if the outstanding bill is not timely paid.

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

ee. Water service to any customer shall not be disconnected at any time during which the customer's appeal to the General Manager or the Board of Directors is pending.



# Agenda Item



**DATE:** April 20, 2023

**TO:** UPUD Board of Directors

**FROM:** Jessica Self, General Manager

**SUBJECT:** Discussion/Action regarding the Approval of the Authorizing Resolution for the State Water Resources Control Board Financial Assistance Application

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## **RECOMMENDED ACTION:**

Motion: \_\_\_\_\_ / \_\_\_\_\_ to approve the Authorizing Resolution for the State Water Resources Control Board Financial Assistance Application for UPUD's Backwash / Recycling and Tank Aeration Project.

## **BACKGROUND:**

UPUD plans to upgrade existing water facilities for the UPUD Backwash / Recycling and Tank Aeration Project (Project). The Project will be funded by the State Water Resources Control Board (SWRCB) and the U.S. EPA through the Drinking Water State Revolving Fund (DWSRF) program.

The purpose of the Project is to provide UPUD with the infrastructure needed to address its current and planned future distribution and storage needs while achieving regulatory compliance for trihalomethanes (THMs). The Project includes installation of infrastructure to recapture the decanted backwash water for reuse or recirculation into the existing treatment process and aeration improvements to reduce high levels of THMs in the domestic water system.

## **SWRCB RESOLUTION REQUIREMENT:**

In order for UPUD's funding application to be completed, the SWRCB requires a formal resolution from the Board which authorizes the UPUD General Manager to be the Authorizing Representative for the SWRCB Financial Assistance Application. The General Manager will represent the District in carrying out all responsibilities under the award agreement.

## **FINANCIAL CONSIDERATIONS:**

Upon completion of the grant award and contracting process, the SWRCB will approve \$1.3 Million in grant funds for UPUD's project.

*Attachments: Resolution 2023-004: Resolution Authorizing UPUD Representative for SWRCB Financial Assistance Application*

**UNION PUBLIC UTILITY DISTRICT  
BOARD OF DIRECTORS**

**RESOLUTION 2023-004**

**RESOLUTION AUTHORIZING UPUD REPRESENTATIVE FOR SWRCB FINANCIAL  
ASSISTANCE APPLICATION**

**WHEREAS**, by the Union Public Utility District (UPUD) that the General Manager, is hereby authorized and directed to sign and file, for and on behalf of UPUD, a Financial Assistance Application for a financing agreement from the State Water Resources Control Board (SWRCB) for the planning, design, and construction of the UPUD's Backwash / Recycling and Tank Aeration Project (Project).

**WHEREAS**, This Authorized Representative, or their designee, is designated to provide the assurances, certifications, and commitments required for the financial assistance application, including executing a financial assistance agreement from the State Water Resources Control Board and any amendments or changes thereto.

**WHEREAS**, The Authorized Representative, or their designee, is designated to represent the Entity in carrying out the Entity's responsibilities under the financing agreement, including certifying disbursement requests on behalf of the Enty and compliance with applicable state and federal laws.

**BE IT FURTHER RESOLVED**, that the General Manager or their designee of UPUD is hereby authorized to negotiate and execute a financial assistance agreement from the SWRCB and any amendments or change orders thereto, and to certify financing agreement disbursements on behalf of UPUD.

**PASSED, APPROVED, AND ADOPTED** this 19<sup>th</sup> day of April, 2023.

AYES:

NOES:

ABSENT:

ABSTAIN:

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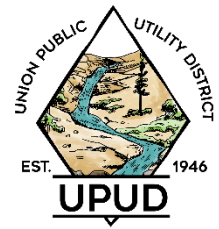
Eric Bottomley, President  
Union Public Utility District

I hereby certify that the within and foregoing is a full, true, and correct copy of the Resolution which was duly passed and adopted at a regular meeting of the Board of Directors of the Union Public Utility District on the 15<sup>th</sup> day of March 2023.

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Elaine M Urruty  
Clerk to the Union Public Utility District Board

# Agenda Item



**DATE:** April 19, 2023

**TO:** UPUD Board of Directors

**FROM:** Jessica Self, General Manager

**SUBJECT:** Discussion/Action Approving UPUD to become Members of the Tuolumne Stanislaus Integrated Regional Water Management Authority and the Association of California Water Agencies.

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## **RECOMMENDED ACTION:**

Motion: \_\_\_\_ / \_\_\_\_ by minute entry approving UPUD to enter into a membership with the Tuolumne Stanislaus Integrated Regional Water Management Authority (TStan IRWMA); and

Motion: \_\_\_\_ / \_\_\_\_ by minute entry approving UPUD to enter into a membership with the Association of California Water Agencies (ACWA).

## **SUMMARY:**

### **Tuolumne Stanislaus Integrated Regional Water Management Authority**

TStan IRWM is organized through a Joint Powers Authority, which focuses on the Tuolumne-Stanislaus Region. The collaboration among diverse partners has defined a clear vision for water resources management, including:

1. Efficient use and distribution of water.
2. More reliable and affordable water supplies.
3. Increased coordination between land use planning entities and water agencies.
4. Resource stewardship and provision for ecosystem needs to include forest management.
5. Improved stormwater capacity for flood management.
6. Climate change in planning for future needs.

The TStan IRWM administers the partnerships plan to facilitate and coordinate in the pursuit of grant funding.

There are numerous neighboring water and wastewater agencies who are currently members and have benefitted through financial assistance in grant funding including:

- Utica Water and Power Authority
- City of Angels Camp
- Murphys Sanitary District
- Calaveras County Water District
- Tuolumne Utility District

**Association of California Water Agencies:**

ACWA is the largest coalition of public water agencies in California, and their strength is in their membership. Member agencies drive ambitious agendas by providing organizational leadership, technical and geographic expertise as well as grassroots activism and outreach.

In turn, ACWA members benefit from the power of a united voice on policy and legislative matters. Members can also access valuable programs and services to help them reduce costs, stay informed, and run their organizations more effectively. ACWA provides many benefits to water agencies. By joining as a public agency member, UPUD will receive:

1. Effective representation in the legislative and regulatory arenas in Sacramento and Washington D.C.
2. Access to expertise in water quality, local government, and water management.
3. Access to programs and services through ACWA's Preferred Provider Program.
4. Networking with local, state, and federal officials.
5. Participation in ACWA's active region and committee structure.
6. Access to benefits and insurance programs through ACWA JPIA: Health, Dental, Vision, Life, Workers Comp, Liability, Property, Long-term Disability and Employee Assistance Program.

Neighboring water agencies who are currently ACWA members include:

- Utica Water and Power Authority
- Calaveras Public Utility District
- Calaveras County Water District
- Tuolumne Utility District
- Amador Water Agency

**FINANCIAL CONSIDERATIONS:**

The membership fees are as follows:

TStan IRWM: Free for the remainder of FY23, and \$200 annually starting July 1, 2023.

ACWA: \$2,581.25 for calendar year 2023, \$7,743.75 for calendar year 2024 and \$10,325 per calendar year thereafter.

*Attachments:*                      *TStan IRWM Brochure*  
   *ACWA Benefits Flyer*



## Integrated Regional Water Management Plan

The first of its kind in the Tuolumne-Stanislaus Region, this collaborative plan defines a clear vision for management of water resources in the region and highlights important actions needed to accomplish that vision. Key issues addressed by the plan include:

- Efficient Use & Distribution of Water
- More Reliable & Affordable Water Supplies
- Meeting Water Quality Needs to Include Addressing Aging Septic Systems
- Increased Coordination between Land Use Planning Entities & Water Agencies
- Resource Stewardship & Provision for Ecosystem Needs to Include Forest Management
- Improved Stormwater Capacity (Flood Management)
- Including Climate Change in Planning for Future Needs

## Our Rivers



Stanislaus River



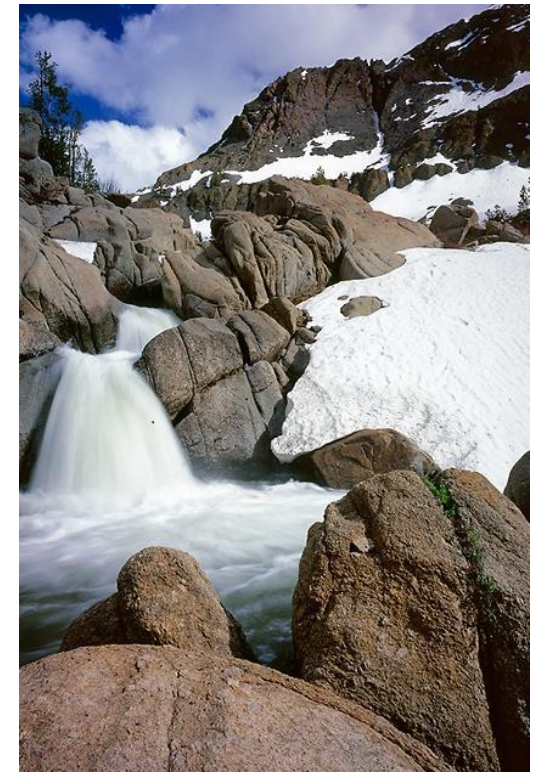
Tuolumne River

## Contact Us

Phone: 209-984-0500  
Email: [tsirwm@gmail.com](mailto:tsirwm@gmail.com)  
Web: [www.tstan-irwma.org](http://www.tstan-irwma.org)

## T-STAN IRWMA

77 North Washington Street  
Sonora, CA 95370

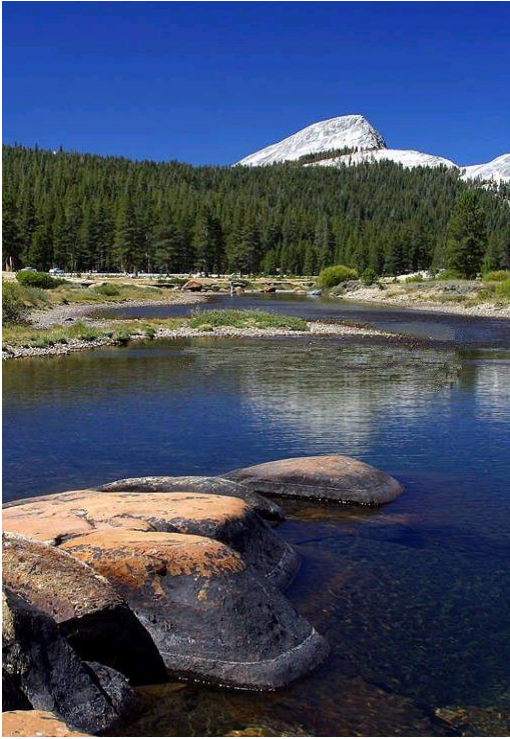


# Tuolumne- Stanislaus

Integrated Regional  
Water Management Authority

A collaborative effort to develop regional  
solutions for all aspects of  
water resource management





## Our Purpose

The purpose of the Tuolumne-Stanislaus Integrated Regional Water Management Authority (T-S IRWMA) is to manage water in a sustainable fashion while achieving balance among the competing uses and requirements for water. We incorporate all aspects of water management into regional solutions through an open collaborative stakeholder process that promotes coordination and integration. The T-S IRWMA administers the T-S IRWM Plan which acts as a blueprint for regional water management. We also facilitate and coordinate the pursuit of grant funding to implement projects in the Plan.

## Operations and Members

Organized through a Joint Powers Authority, the IRWMA has paid staff who provide administrative and financial management, as well as facilitation and process management.

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***“Above and beyond the successful funding that the IRWM has brought to the local region, its real value has been the creation of new partnerships and dialogues that simply would not have happened without the IRWM.”***

### ***IRWMA Member***

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The T-S IRWMA is governed by a Board of Directors who provide the majority of funding for operation of the Authority. Board decisions are informed by recommendations from the Watershed Advisory Committee (WAC) consisting of representatives from approximately twenty-five organizations and agencies. Members include:

- Business Organizations
- Disadvantaged Communities
- Environmental Groups
- Local Government
- Tribes
- US Forest Service
- Water Agencies

Decision-making is inclusive and consensus is our goal.

## T-Stan IRWMA Region

The Region's boundaries encompass approximately 2,700 square miles, spanning the western slope of the Sierra Nevada, rising from the lower Sierra foothills to the crest of the Sierra Nevada and includes the Upper Tuolumne River, Upper Stanislaus River, and Upper Rock Creek-French Camp Slough watersheds. The Region includes all of Tuolumne County, the southern portion of Calaveras County, and southwestern Alpine County.




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***The Sierra Nevada is the source of approximately 60% of California's developed water supply.***

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# MAXIMIZE YOUR MEMBERSHIP



In addition to advocacy and a voice on key water issues, your membership in ACWA gives you access to a wide variety of information, resources and value-added programs. To help you get the most of your membership, here are a few tips for maximizing your participation in ACWA.

## 1

### ENGAGE IN THE ISSUES

Whether its serving on a Region Board or participating in a Committee, there are plenty of ways to get involved. ACWA's thirteen standing committees provide guidance to the association on a wide variety of issues. ACWA's ten regions support ACWA's goals, engage in local outreach efforts, and educate ACWA's membership.

## 2

### STAY INFORMED, TAKE ACTION, USE OUR TOOLKITS & GET AWARDED

Gain access to [www.acwa.com](http://www.acwa.com) to keep up on the latest issues, join our outreach network, learn about ways to get recognized for leadership in California water and access helpful toolkits to help educate local audiences.

## 3

### NETWORK & GAIN KNOWLEDGE

ACWA events are the premier destination for water industry professionals to learn and network. Events include ACWA's bi-annual statewide conferences, Washington, DC conference, region events, webinars, and many others.

## 4

### SAVE MONEY

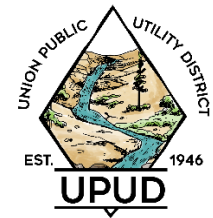
Make the most of your membership today by reviewing your benefits including products and services available to your agency. Members receive discounted rates on all ACWA-sponsored events and publications. ACWA's Preferred Provider network connects you to businesses that have been vetted and endorsed by ACWA.

## 5

### GET INSURED

ACWA members have exclusive opportunity to partner with ACWA JPIA for liability, property, worker's compensation and employee benefits coverage – potentially saving agencies hundreds of thousands of dollars annually.

# Agenda Item



**DATE:** April 19, 2023  
**TO:** UPUD Board of Directors  
**FROM:** Jessica Self, General Manager  
**SUBJECT:** Develop a UPUD Finance Committee

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## **RECOMMENDED ACTION:**

Motion: \_\_\_\_\_ / \_\_\_\_\_ by minute entry to develop a Finance Committee for UPUD.

## **SUMMARY:**

A finance committee is an integral part of a public agency. This committee carries out duties associated with financial oversight. The main responsibility for a finance committee is to review and approve the annual budget before it goes to the full board for approval. Additional finance committee responsibilities include:

1. Oversee the development and management of the operating budget.
2. Establish financial goals and objectives.
3. Presenting financial goals to the Board of Directors.
4. Establishing and managing funding strategies.
5. Complying with federal, state, and local reporting requirements.

Staff recommends having the Board President select two Board Directors to sit on the Finance Committee. In addition to the two Directors, UPUD Staff, including the General Manager and finance staff will be part of the finance committee.

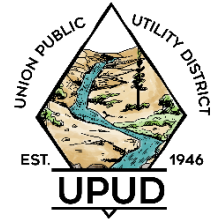
Staff recommends the finance committee to meet quarterly, starting in May, 2023.

## **FINANCIAL CONSIDERATIONS:**

None at this time.



# Agenda Item



**DATE:** April 19, 2023

**TO:** UPUD Board of Directors

**FROM:** Elaine Urruty, Clerk to the Board

**SUBJECT:** Renewal of Liability Insurance Policy with Cutler Segerstrom Insurance

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## **RECOMMENDED ACTION:**

Motion: \_\_\_\_\_ / \_\_\_\_\_ by minute entry to approve the renewal of liability insurance policy with Cutler Sergestrom Insurance, with a limit to the renewal amount, not to exceed the budgeted \$25,000 without the General Manager's approval.

## **SUMMARY:**

Union Public Utility District (UPUD) annual Property and Liability Insurance renewal is due May 1, 2023. Our insurance agent, Heather Karney, from Cutler Segerstrom Insurance/Leavitt Group has informed us that our premium through Glatfelter Insurance Group is up for renewal. Our rate last year was \$22,845, which was up \$344 from the prior year. Cutler Segerstrom is getting a new quote for this year's policy from Glatfelter.

Staff recommend renewing the District's Property and Liability Insurance with Cutler Segerstrom/Leavitt Group through Glatfelter since we have had a good business history and past increases have been reasonable. The Board can limit the renewal amount, not to exceed the budgeted \$25,000 without the General Manager's approval.

## **Alternatives**

The Board could request Cutler Segerstrom to check for other comparable coverage or request a quote from another insurance carrier. However, time is limited, as our coverage ends 04/30/2023.

## **FINANCIAL CONSIDERATIONS:**

The budget for Property and Liability Insurance for this year is \$25,000. We expect a slight increase due to our new 2022 F150 truck recently added, for inflation to property limits, and for an additional replacement truck expected to be added this year.