AGENDA
IRVINE RANCH WATER DISTRICT
BOARD OF DIRECTORS
REGULAR MEETING

February 8, 2021

Due to COVID-19, this meeting will be conducted as a teleconference pursuant to the provisions of the Governor's Executive Orders N-25-20 and N-29-20, which suspend certain requirements of the Ralph M. Brown Act. Members of the public may not attend this meeting in person.

Participation by members of the Board of Directors will be from remote locations. Public access and participation will only be available telephonically/electronically.

To virtually attend the meeting and to be able to view any presentations or additional materials provided at the meeting, please join online via Webex using the link and information below:

Via Web: https://irwd.webex.com/irwd/j.php?MTID=m8693f086f8af4312c352b0f4e01c4f60
Meeting Number (Access Code): 146 862 1331
Meeting Password: 9E4EjFYkmS9

After joining the meeting, in order to ensure all persons can participate and observe the meeting, please select the "Call in" option and use a telephone to access the audio for the meeting by using the call-in information and attendee identification number provided.

As courtesy to the other participants, please mute your phone when you are not speaking.

PLEASE NOTE: Participants joining the meeting will be placed into the Webex lobby when the Board enters closed session. Participants who remain in the "lobby" will automatically be returned to the open session of the Board once the closed session has concluded. Participants who join the meeting while the Board is in closed session will receive a notice that the meeting has been locked. They will be able to join the meeting once the closed session has concluded.

CALL TO ORDER   5:00 p.m.

ROLL CALL   Directors LaMar, McLaughlin, Swan, and Withers, and President Reinhart

PUBLIC COMMENT NOTICE

If you wish to address the Board of Directors on any item, please submit a request to speak via the "chat" feature available when joining the meeting virtually. Remarks are limited to three minutes per speaker on each subject. You may also submit a public comment in advance of the meeting by emailing comments@irwd.com before 12:00 p.m. on Monday, February 8, 2021.

ALL VOTES SHALL BE TAKEN BY A ROLL CALL VOTE.

COMMUNICATIONS TO THE BOARD

1. A. <u>Written:</u>

    B. <u>Oral:</u>

2. <u>ITEMS RECEIVED TOO LATE TO BE AGENDIZED</u>

    Recommendation: Determine the need to discuss and/or take immediate action on item(s).

CONSENT CALENDAR, ITEMS 3 through 5   (Next Resolution No. 2021-4)

3. <u>BOARD MEETING MINUTES</u>

    Recommendation: That the minutes of the January 25, 2021 Regular Board meeting be approved as presented.

4. <u>RATIFY/APPROVE BOARD OF DIRECTORS' ATTENDANCE AT MEETINGS AND EVENTS</u>

    Recommendation: That the Board ratify/approve the meetings and events for Steven LaMar, Karen McLaughlin, Douglas Reinhart, Peer Swan, and John Withers, as described.

5. <u>SALE OF FORMER CARPENTER IRRIGATION DISTRICT OFFICE PROPERTY</u>

    Recommendation: That the Board approve the sale of the former Carpenter Irrigation District Office Property to Phillip De Los Reyes for a sale price of $250,000 and authorize the general manager to execute all required escrow and related transfer documents to complete the sale process.

ACTION CALENDAR

6. <u>ORACLE CUSTOMER CARE & BILLING UPGRADE</u>

    Recommendation: That the Board authorize the General Manager to execute a Professional Services Agreement with Origin Consulting in an amount not to exceed $1,200,000 for the Oracle CC&B Upgrade Project, Projects 10546 and 10547.

ACTION CALENDAR - Continued

7. <u>2021 LEGISLATIVE AND REGULATORY UPDATE</u>

   Recommendation: That the Board adopt a "concerns" position on SB 222 (Dodd), an "oppose unless amended" position on SB 223 (Dodd), a "support" position on ACWA's water rate validations proposal, a "support" position on CASA's flushable products state and federal legislation and a "support" position on the $85 million budget proposal for the Regional Forest and Fire Capacity Program.

OTHER BUSINESS

Pursuant to Government Code Section 54954.2, members of the Board of Directors or staff may ask questions for clarification, make brief announcements, and make brief reports on his/her own activities. The Board or a Board member may provide a reference to staff or other resources for factual information, request staff to report back at a subsequent meeting concerning any matter, or direct staff to place a matter of business on a future agenda. Such matters may be brought up under the General Manager's Report or Directors' Comments.

8. General Manager's Report

9. Directors' Comments

10. Receive oral update(s) from District liaison(s) regarding communities within IRWD's service area and provide information on relevant community events.

11a. CLOSED SESSION CONFERENCE WITH LEGAL COUNSEL – EXISTING LITIGATION – Pursuant to Government Code Section 54956.9(d)(1): *Kern County Water Agency v. Groundwater Banking Joint Powers Authority, Rosedale-Rio Bravo Water Storage District, Irvine Ranch Water District,* Kern County Superior Court Case No. BCV-21-100223

11b. CLOSED SESSION CONFERENCE WITH LEGAL COUNSEL – EXISTING LITIGATION – Pursuant to Government Code Section 54956.9(d)(1): *City of Bakersfield v. Groundwater Banking Joint Powers Authority, Rosedale-Rio Bravo Water Storage District, Irvine Ranch Water District,* Kern County Superior Court Case No. [pending assignment]

12. Open Session.

13. Adjourn.

CONSENT CALENDAR

BOARD MEETING MINUTES

SUMMARY:

Provided are the minutes of the January 25, 2021 Regular Board meeting for approval.

FISCAL IMPACTS:

None.

ENVIRONMENTAL COMPLIANCE:

Not applicable.

COMMITTEE STATUS:

Not applicable.

RECOMMENDATION:

THAT THE MINUTES OF THE JANUARY 25, 2021 REGULAR BOARD MEETING BE APPROVED AS PRESENTED.

LIST OF EXHIBITS:

Exhibit "A" – January 25, 2021 Minutes

Note: This page is intentionally left blank.

MINUTES OF REGULAR MEETING – January 25, 2021

The regular meeting of the Board of Directors of the Irvine Ranch Water District (IRWD) was called to order at 5:00 p.m. by President Reinhart on January 25, 2021 via teleconference pursuant to the provisions of the Governor's Executive Orders N-25-20 and N-29-20 due to COVID-19. Members of the public did not attend this meeting in person.

Directors Present: Withers, Swan, McLaughlin, LaMar and Reinhart.
Directors Absent: None.

Also Present: General Manager Cook, Executive Director of Technical Services Burton, Executive Director of Water Policy Weghorst, Executive Director of Finance and Administration Clary, Director of Treasury and Risk Management Jacobson, Executive Director of Operations Chambers, Director of Water Quality and Regulatory Compliance Colston, Director of Recycling Operations Zepeda, Director of Information Services Malone, Director of Water Resources Sanchez, Director of Maintenance Mykitta, Government Relations Officer/Deputy General Counsel Compton, Secretary Bonkowski, General Counsel Collins, Special Legal Counsel Robinson and Roux, Consultant Gregorio Estrada, and members of staff and the public.

WRITTEN AND ORAL COMMUNICATIONS: None.

ITEMS RECEIVED TOO LATE TO BE AGENDIZED: None.

CONSENT CALENDAR

On MOTION by Withers, seconded by LaMar, and unanimously carried by a roll call vote (5-0) Withers, McLaughlin, Swan, LaMar and Reinhart voting aye, and 0 noes, ITEMS 3 THROUGH 9 WERE APPROVED AS FOLLOW:

3.   BOARD MEETING MINUTES

        Recommendation: That the minutes of the January 11, 2021 Regular Board meeting be approved as presented.

4.   RATIFY/APPROVE BOARD OF DIRECTORS' ATTENDANCE AT MEETINGS AND EVENTS

        Recommendation: That the Board ratify/approve the meetings and events for Steven LaMar, Karen McLaughlin, Douglas Reinhart, Peer Swan, and John Withers, as described.

5.   IRWD STRATEGIC MEASURES

        Recommendation: Receive and file.

6.   DECEMBER 2020 TREASURY REPORT

       Recommendation: That the Board receive and file the Treasurer's Investment Summary
       Report, the Summary of Fixed and Variable Rate Debt, and Disclosure Report of
       reimbursements to Board members and staff, approve the December 2020 Summary of
       Payroll ACH payments in the total amount of $2,214,181, and approve the December
       2020 Accounts Payable Disbursement Summary Of Warrants 413651 through 414651,
       Workers' Compensation distributions, wire transfers, payroll withholding distributions
       and voided checks in the total amount of $17,781,264.

7.   2021 INDEX TENDER NOTES REMARKETING

       Recommendation: That the Board approve the 2021 Index Tender Notes
       Remarketing Statement and adopt the following resolution by title approving the
       remarketing statement relating to Unscheduled Mandatory Tenders (Refunding Series
       2011A-1 and Refunding Series 2011A-2).

RESOLUTION NO. 2021-3

RESOLUTION OF THE BOARD OF DIRECTORS OF
THE IRVINE RANCH WATER DISTRICT APPROVING
THE REMARKETING STATEMENT RELATING TO
UNSCHEDULED MANDATORY TENDERS
(REFUNDING SERIES 2011A-1 AND REFUNDING SERIES 2011A-2)

8.   2021 LEGISLATIVE AND REGULATORY UPDATE

       Recommendation: That the Board adopt an "OPPOSE" position on AB 59 (Gabriel), a
       "SEEK AMENDMENTS" position on SB 55 (Stern), and a "SUPPORT IN CONCEPT"
       position on the legislative concept to allocating a portion of California's federal COVID-
       19 relief funding equitably to water districts across the state to assist customers with their
       outstanding debt.

9.   HEATING, VENTILATION AND AIR CONDITIONING MAINTENANCE
       THREE-YEAR CONTRACT

       Recommendation: That the Board authorize the General Manager to execute a three-year
       contract with Ram Air Engineering, Inc. for Commercial HVAC services for a total
       amount of $685,620.

ACTION CALENDAR

SEWAGE TREATMENT MASTER PLAN UPDATE, BUDGET ADDITION, AND BUDGET INCREASE

Using a PowerPoint presentation, Senior Engineer Moeder said that the purpose of a Sewage Treatment Master Plan (STMP) is to develop a long-term plan for optimizing sewage conveyance and treatment of ultimate sewer flows. Mr. Moeder said that in 2003, IRWD prepared a Wastewater Treatment Master Plan that defined a logical, cost effective program to upgrade and expand IRWD's recycling treatment plants to handle projected sewage flows, meet effluent quality requirements, and satisfy recycled water demands through 2025. Using a chart, he summarized many of the recommendations in that plan including the Michelson Water Recycling Plant (MWRP) Phase 1 and Phase 2 Expansions, the Los Alisos Water Recycling Plant (LAWRP) 2005 Upgrades, and the Harvard Avenue Trunk Sewer Diversion to MWRP.

Mr. Moeder reviewed the progress since the Strategic Planning Workshop held in January 2020 including: 1) considered treatment technology alternatives, 2) shortlisted and evaluated treatment alternative for MWRP and LAWRP, 3) developed and refined design criteria for system-wide and facility-specific improvements, 4) and developed an implementation plan.

Mr. Moeder said that the 2020 STMP is now complete and provides a framework for handling future ultimate sewage flows which is structured in a manner that identifies an overall strategy organized into near-term and long-term recommendations. It is also structured such that various near-term improvements can be implemented now without committing IRWD to completion of the identified long-term recommendations. This approach provides IRWD with the flexibility of proceeding with initial projects while continuing to monitor changing conditions that will then be considered in future evaluations and decisions regarding implementation of the long-term recommendations. He said that the near-term improvements include: 1) replacing the lagoon treatment system at LAWRP with a modernized treatment process, 2) expanding the capacity of the membrane bioreactors (MBR) and implementing improvements to the existing conventional activated sludge treatment processes at MWRP to accommodate projected increases in sewer loading concentrations, and 3) constructing a new gravity sewer diversion from the MWRP tributary sewershed to the LAWRP tributary sewershed to deliver additional sewer flows to LAWRP for treatment.

HDR Consultant Mr. Gregorio Estrada provided an overview of these proposed improvements at MWRP and LAWRP and discussed an implementation plan, future considerations, and next steps for sewage treatment alternatives. Following discussion, Director Swan asked that each project be "flagged" and was satisfied with moving forward with additional planning studies for the two projects. He further made suggestions for an additional Board meeting to review the STMP assumptions and that staff should discuss future potable reuse concepts with the Baker Partners.

Director Withers said that item was reviewed by the Engineering and Operations Committee on January 19, 2021. There being no further comments, On MOTION by Withers, seconded by McLaughlin, and unanimously carried by a roll call vote (5-0) Withers, McLaughlin, Swan, LaMar and Reinhart voting aye, and 0 noes, THE BOARD AUTHORIZED THE ADDITION OF THE MWRP TRIBUTARY GRAVITY DIVERSION, PROJECT 11832, IN THE AMOUNT OF $2,942,000 TO THE FY 2020-21 CAPITAL BUDGET, AUTHORIZED A BUDGET INCREASE IN THE AMOUNT OF $193,130,250, FROM $20,975,000 TO $214,105,250, FOR

THE LAWRP TREATMENT MODERNIZATION, PROJECT 01477, THAT PROJECTS 11832 AND 01477 BE CATEGORIZED AS *FLAGGED* PROJECTS IN THE CAPITAL BUDGET, AND THAT EXPENDITURE AUTHORIZATIONS BE APPROVED FOR PLANNING STUDIES IN THE AMOUNT OF $125,000 FOR PROJECT 11832 AND $150,000 FOR PROJECT 01477 AS AMENDED.

RECESS AND RECONVENE

At 7:25 p.m., President Reinhart recessed the meeting, and following the recess, at 7:30 p.m., the meeting was reconvened with Directors Swan, Withers, McLaughlin, LaMar and Reinhart present.

OPERATIONS CENTER COMPRESSED NATURAL GAS, DIESEL, AND GASOLINE FUELING FACILITY BUDGET INCREASE AND CONSULTANT SELECTION

Executive Director of Technical Services Burton reported that IRWD's Fleet Services Facility maintains a fleet of approximately 300 vehicles fueled by either diesel, gasoline, or Compressed Natural Gas (CNG). A diesel and gasoline fuel island is located at the Michelson Water Recycling Plant in the parking lot adjacent to the Fleet Services Facility. Currently, the District's CNG vehicles are fueled at the City of Irvine's facility or the City of Santa Ana's facility. He said that this project will install a new CNG Fueling Facility to fuel 11 sewer jetter trucks, vactor trucks, hydraulic excavators, tractor, and boom crane.

Mr. Burton said that the existing diesel and gasoline fleet fueling systems are approaching the end of useful life and require replacement. The systems consist of a 15,000-gallon underground gasoline storage tank, a 12,000-gallon underground diesel storage tank, fuel dispensers, transition sumps, and piping. He said that this project will replace the existing storage tanks with above ground storage tanks located on the hillside area northeast of the Michelson Operations Center Access Road as well as replace the existing fuel dispensers and associated piping and equipment at the fuel island.

Mr. Burton said that the District is in the process of increasing emergency fuel storage capacity throughout IRWD's service area to account for three days of emergency fuel use for generators. The Michelson Operations Center has nine stationary generators and 11 portable generators. The last component of this project is the installation of an additional above ground diesel storage tank to supply the three days of emergency diesel fuel.

Mr. Burton said that staff issued a request for proposal for the design to three consultants: AECOM, HDR, and Stantec. HDR declined to submit a proposal citing staff availability. AECOM and Stantec submitted proposals on December 21, 2020. He said that staff evaluated the proposals based on the consultants' project approach, project team and relevant experience and recommends the selection of AECOM. In response to Director Swan's comments relative to visibility of the proposed facility near the District's Tree Hill site, Mr. Burton said that if it is visible, the area can be screened with trees. He further said that staff will prepare preliminary drawings and rendering for him to review.

Director Withers reported that this item was reviewed by the Engineering and Operations Committee on January 19, 2021. There being no further comments, On <u>MOTION</u> by Director Withers, seconded by McLaughlin, and unanimously carried by a roll call vote (5-0) Withers, McLaughlin, Swan, LaMar and Reinhart voting aye, and 0 noes, THE BOARD AUTHORIZED

A BUDGET INCREASE IN THE AMOUNT OF $1,882,000, FROM $748,000 TO $2,630,000, FOR PROJECT 07881 AND IN THE AMOUNT OF $4,509,000, FROM $748,000 TO $5,257,000, FOR PROJECT 07882, AND AUTHORIZED THE GENERAL MANAGER TO EXECUTE A PROFESSIONAL SERVICES AGREEMENT WITH AECOM IN THE AMOUNT OF $701,560 FOR ENGINEERING DESIGN SERVICES FOR THE OPERATIONS CENTER COMPRESSED NATURAL GAS, DIESEL, AND GASOLINE FUELING FACILITY, PROJECTS 07881 AND 07882.

GENERAL MANAGER'S REPORT

General Manager Cook reported that due to legislation, staff is now in the regulatory mode with COVID-19 notifications to employees. Mr. Cook said that because of the numbers, MWRP is now classified as an outbreak facility, which is based on the numbers only, as there are no known cases of COVID-19 being contracted at that location. He said that the District began testing at no charge to the employees and was happy to report that all tests conducted so far have came back negative.

Mr. Cook said that as a follow-up from the last Board meeting, the District remains status quo at $1.6 million outstanding for customer billing.

Mr. Cook reported that Mr. Eric Averett, the General Manager of the Rosedale-Rio Bravo Storage District, will be leaving Rosedale to work at a consulting firm in 45 days but will also be available for questions for an additional 45 days.

Mr. Cook reported that the District will be receiving $1.93 million in incentives as a result of the Self-Generation Incentive Program implementation with Southern California Edison for the MWRP Biosolids and Energy Recovery project, and thanked staff for their efforts.

Mr. Cook additionally asked that the Board meeting be adjourned in memory of Mr. Mark Butier, Sr.

COMMUNITY UPDATE

Mr. Bruce Newell reported on the Williams and Silverado Canyon status due to the recent fires and rain events, and that the area is categorized as hazardous.

DIRECTORS' COMMENTS

Director Swan reported on his attendance at OCWD and MWDOC meetings, an ACWA Conveyance Forum, an OCBC Committee meeting, a WACO meeting, and Newport Chamber of Commerce meetings. In response to his inquiry, Mr. Jose Zepeda provided him with an update of the microturbines at the MWRP Biosolids facility.

Director LaMar reported on his attendance at several ACWA meetings, and an OCBC Infrastructure Committee meeting. He said that this Wednesday he will be attending an NCC Executive Committee meeting and will also be attending an ACWA Board workshop this week.

DIRECTOR' COMMENTS (CONTINUED)

Director McLaughlin reported on her attendance at an OCWA webinar and an OC Economic update for Public Leaders.

Director Withers reported on his attendance at an OCBC Infrastructure Committee meeting, an OCWD webinar, an OC Economic update, an ISDOC quarterly meeting, and a meeting with the Mr. Ryan Gallager, the City of Tustin's newly-elected council member. He further said that he will be attending a CASA conference on the January 27-28 along with Director Swan as well as an NWRI meeting next week.

Director Reinhart reported on his attendance at an OCWD Board meeting, a MWDOC meeting, a MWDOC Executive Committee meeting, and a South County Committee meeting.

CLOSED SESSION

Legal Counsel Collins said that the following Closed Sessions would be held:

1) CLOSED SESSION CONFERENCE WITH LEGAL COUNSEL — EXISTING LITIGATION — Pursuant to Government Code Section 54956.9(d)(1): *Filanc-Balfour Beatty, JV v. IRWD*, Case No. 30-2019-01048770-CU-BC-CXC

2) CLOSED SESSION CONFERENCE WITH LEGAL COUNSEL — ANTICIPATED LITIGATION. Significant exposure to litigation pursuant to Government Code Section 54956.9(d)(2): (1 case)

OPEN SESSION

Following the Closed Session, the meeting was reconvened with Directors McLaughlin, Swan, Reinhart, LaMar and Withers present. No action was reported.

ADJOURNMENT

There being no further business, President Reinhart adjourned the meeting in memory of Mr. Mark Butier Sr. at 9:30 p.m.

APPROVED and SIGNED this 8th day of February 2021.

President, IRVINE RANCH WATER DISTRICT

Secretary IRVINE RANCH WATER DISTRICT

APPROVED AS TO FORM:

Claire Hervey Collins, General Counsel
Hanson Bridgett LLP

CONSENT CALENDAR

RATIFY/APPROVE BOARD OF DIRECTORS' ATTENDANCE AT MEETINGS AND EVENTS

SUMMARY:

Pursuant to Resolution 2006-29 adopted on August 28, 2006, the following events and meetings require approval by the Board of Directors:

Steven LaMar

February 1-2	ACC-OC Virtual Sacramento Advocacy Trip
February 4	Orange County Business Council's Annual Board Installation & Virtual Dinner
February 17-18	Urban Water Institute Virtual Spring Conference
February 24	ACWA Virtual Washington, D.C. Conference
March 11	ACWA Virtual Legislative Symposium

Karen McLaughlin

February 24	ACWA Virtual Washington, D.C. Conference

Douglas Reinhart

January 28	Metropolitan Water District of Southern California Virtual Regional Recycled Water Advanced Purification Center Tour
February 24	MWDOC 2021 Virtual Water Policy Forum

Peer Swan

January 8	Orange County Business Council's Government Affairs Committee
January 13	ACWA Conveyance Financing Committee
January 19	Orange County Business Council's Infrastructure Committee
January 29	Water Agency Messaging Webinar by Probolsky Research
February 4	Orange County Business Council's Annual Board Installation & Virtual Dinner
February 17-18	Urban Water Institute Virtual Spring Conference

John Withers

January 27	Form 700 Refresher Workshop Webinar
February 24	ACWA Virtual Washington, D.C. Conference

RECOMMENDATION:

THAT THE BOARD RATIFY/APPROVE THE MEETINGS AND EVENTS FOR STEVEN
LAMAR, KAREN MCLAUGHLIN, DOUGLAS REINHART, PEER SWAN, AND JOHN
WITHERS AS DESCRIBED HEREIN.

LIST OF EXHIBITS:

None.

CONSENT CALENDAR

SALE OF FORMER CARPENTER IRRIGATION DISTRICT OFFICE PROPERTY

SUMMARY:

IRWD owns real property located in an unincorporated area of Orange County which was the former office site for the Carpenter Irrigation District. At its meeting on December 14, 2020, the Board designated the property as Exempt Surplus Land and authorized staff to initiate the process to sell the property. Following a competitive sale process, staff recommends the Board approve the sale of the property to Phillip de los Reyes for a sale price of $250,000 and authorize the General Manager to execute all required escrow and transfer documents to complete the sale process.

BACKGROUND:

IRWD owns the former Carpenter Irrigation District headquarters property which includes an approximate 4,700-square-foot parcel and a small building. The property is located at the intersection of Hewes Street and East Center Avenue in an unincorporated area of Orange County. The building has been vacant for many years and based on staff's analysis, the property will not be needed for any future District operating purposes. A location map and depiction of the building and adjacent parking area is provided as Exhibit "A".

The State of California's Surplus Land Act (the "Act") states that parcels of less than 5,000 square feet are exempt from its surplus land sale process. Consistent with the requirements of IRWD's Real Property Policy, on December 14, 2020, the Board designated the property as Exempt Surplus Land and authorized staff to initiate the process to sell the property.

Property Sale Process:

IRWD retained Ferragamo Real Estate as the real estate brokerage firm to sell the Carpenter property. Ferragamo was selected based on its brokerage experience with other properties located in the Orange and Anaheim Hills market area. Based on comparable sales data for the area, and estimated improvement costs for the property, the listing price was set at $199,000.

Ferragamo received a total of 19 offers to purchase the Carpenter property which were provided to IRWD staff for review. The offers ranged in price from $125,000 to $250,000. Based on the significant number of offers received and price range, staff selected a recommended buyer pending approval of the Board.

Proposed Property Sale Price and Terms:

Staff reviewed all of the offers received from the District's broker taking into consideration both
the proposed purchase price and terms. Based on its review, staff recommends that the offer
detailed below be accepted by the Board.

- Buyer: Phillip de los Reyes
- Property Address: 18741 East Center Avenue, Orange, CA 92869
- Offer Price: $250,000
- Escrow Period: Seven days after opening of escrow
- Condition: Property is being purchased "as-is" with no lending contingencies
- Sellers Broker: Ferragamo Real Estate
- Buyers Broker: Ferragamo Real Estate
- Total Commission: 5% ($12,500) paid by seller

In addition to the proposed purchase information provided above, the buyer and IRWD would
split escrow fees 50/50 and IRWD is responsible for the cost of title insurance. IRWD expenses
for escrow and title costs are estimated to total $4,500.

FISCAL IMPACTS:

Net proceeds from the sale of the Carpenter property, after deducting the real estate commission
and title and escrow expenses, are estimated to total $233,000.

ENVIRONMENTAL COMPLIANCE:

This item is not a project as defined in the California Environmental Quality Act Code of
Regulations, Title 14, Chapter 3, Section 15378.

COMMITTEE STATUS:

This item was reviewed by the Finance and Personnel Committee in Closed Session on February
2, 2021.

RECOMMENDATION:

THAT THE BOARD APPROVE THE SALE OF THE FORMER CARPENTER IRRIGATION
DISTRICT OFFICE PROPERTY TO PHILLIP DE LOS REYES FOR A SALE PRICE OF
$250,000 AND AUTHORIZE THE GENERAL MANAGER TO EXECUTE ALL REQUIRED
ESCROW AND RELATED TRANSFER DOCUMENTS TO COMPLETE THE SALE
PROCESS.

LIST OF EXHIBITS:

Exhibit "A" – Location of the former Carpenter Irrigation property

Exhibit "A"
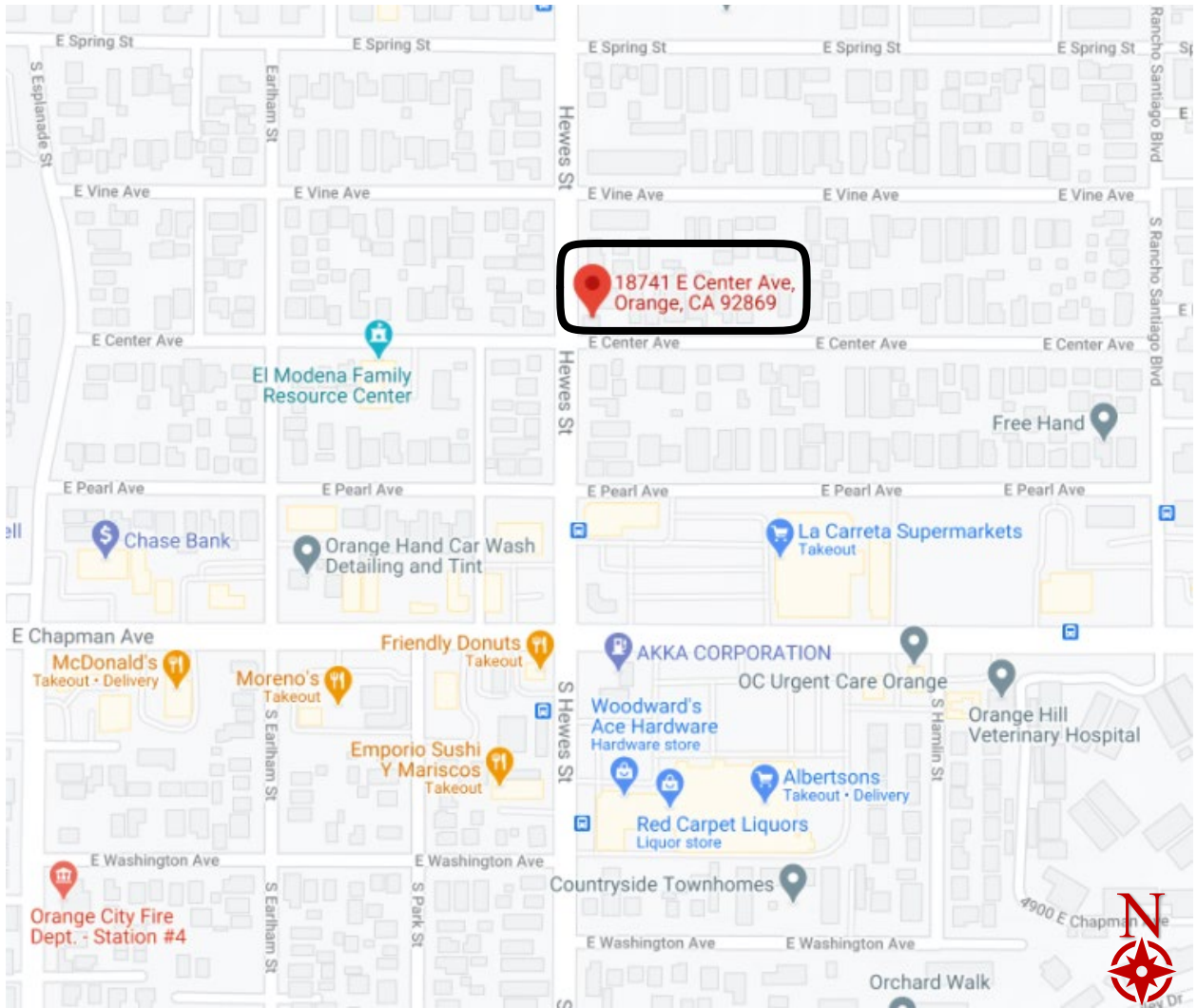
A-1

Carpenter Property

Google Earth

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ACTION CALENDAR

<u>ORACLE CUSTOMER CARE & BILLING UPGRADE</u>

<u>SUMMARY:</u>

IRWD's primary billing system, Oracle Customer Care & Billing (CC&B), was implemented in 2014. The version of the software used by the District, CC&B v2.4, is at the end of life and Oracle will not provide further updates to the existing software. Staff recommends the Board authorize the General Manager to execute a Professional Services Agreement with Origin Consulting in an amount not to exceed $1,200,000 for the Oracle CC&B Upgrade Project.

<u>BACKGROUND:</u>

IRWD implemented Oracle CC&B v2.4 in 2014. CC&B is the District's main customer billing and management system which includes monthly billing, tracking of customer interactions with the District, scheduling of service appointments and billing history. Oracle Utilities Analytics (OUA) is an adjacent application used to provide reporting and analysis of customer information and is part of the upgrade proposal. Oracle CC&B v2.4 is at the end of life and Oracle will not provide further updates to the existing software.

In anticipation of the end of life on the existing version of CC&B, in April 2018, the Board approved Projects 10546 and 10547, each in the amount of $1,424,500, for a total of $2,849,000 to fund an initiative to upgrade CC&B to the latest version (v2.7). The scope of the initiative is to perform a technical upgrade of CC&B with minimal change to existing business processes.

Staff issued a request for proposal in November 2020 to five consultants with experience supporting utilities using Oracle CC&B: Infosys, Origin Consulting, Red Clay, Tata Consulting Services (TCS) and Utility Solutions. All firms, except for TCS, submitted a proposal. Staff reviewed and ranked the proposals and selected the top two firms for interviews: Infosys and Origin Consulting. After conducting interviews, staff updated the rankings, as shown in the Consultant Selection Matrix provided as Exhibit "A".

Based on the interviews and proposal rankings, staff believes that Origin Consulting has the best understanding of the Oracle CC&B Upgrade project and the most experienced and talented project team with the CC&B application. Origin Consulting submitted an optimal and realistic project schedule, and staff believes it is the most capable of implementing a successful upgrade. The Oracle CC&B Upgrade project is expected to cost up to $2,000,000, which includes Origin Consulting's proposal of $1,200,000 and an additional estimated $800,000 of internal staff time. The upgrade project does not require the acquisition of additional licenses from Oracle or additional hardware.

Origin Consulting is headquartered in Las Vegas, Nevada, has approximately 90 consultants and specializes exclusively in Oracle CC&B support. IRWD has previously worked with Origin and

has a positive working relationship with the firm. It extensively leverages a modern agile methodology that significantly reduces the time and effort required to perform its projects. As part of its proposal, Origin will also prepare IRWD to eventually move CC&B to the cloud by converting custom programming code to a new standard, cloud-ready code. The other consultants did not offer this feature. Origin Consulting's proposal is provided as Exhibit "B".

FISCAL IMPACTS:

The Oracle CC&B Upgrade will be funded through replacement funds allocated to Projects 10546 and 10547, which were previously approved by the Board.

Project No.	Current Budget	Addition <Reduction>	Total Budget
10546	$1,424,500	$0	$1,424,500
10547	$1,424,500	$0	$1,424,500
Total	$2,849,000	$0	$2,849,000

ENVIRONMENTAL COMPLIANCE:

This item is not a project as defined in the California Environmental Quality Act Code of Regulations, Title 14, Chapter 3, Section 15378

COMMITTEE STATUS:

This item was reviewed by the Finance and Personnel Committee on February 2, 2021.

RECOMMENDATION:

THAT THE BOARD AUTHORIZE THE GENERAL MANAGER TO EXECUTE A PROFESSIONAL SERVICES AGREEMENT WITH ORIGIN CONSULTING IN AN AMOUNT NOT TO EXCEED $1,200,000 FOR THE ORACLE CC&B UPGRADE PROJECT, PROJECTS 10546 AND 10547.

LIST OF EXHIBITS:

Exhibit "A" – Oracle CC&B Upgrade – Consultant Evaluation Matrix
Exhibit "B" – Oracle CC&B Upgrade – Origin Consulting Statement of Work and Fee Proposal

EXHIBIT "A"
CONSULTANT EVALUATION MATRIX

Item	Description	Weights	Infosys		Origin Consulting		Red Clay		Utility Solutions	
			ORACLE CUSTOMER CARE & BILLING UPGRADE							
A	<u>TECHNICAL APPROACH</u>	**40%**	**RANK**	**WEIGHTED SCORE**	**RANK**	**WEIGHTED SCORE**	**RANK**	**WEIGHTED SCORE**	**RANK**	**WEIGHTED SCORE**
1	Overall Project Understanding / Approach	40%	2.0	0.8	1.0	0.4	4.0	1.6	3.0	1.2
2	Scope of Proposal	60%	2.0	1.2	1.0	0.6	3.0	1.8	4.0	2.4
	Weighted Score (Technical Approach)		**1.5**	**2.0**	**0.8**	**1.0**	**2.6**	**3.4**	**2.7**	**3.6**
B	<u>QUALIFICATION AND EXPERIENCE</u>	**60%**								
1	Project Manager	40%	3.0	1.2	1.0	0.4	2.0	0.8	4.0	1.6
2	Project Team	40%	4.0	1.6	1.0	0.4	3.0	1.2	2.0	0.8
3	Sub Consultants	20%	2.0	0.4	2.0	0.4	2.0	0.4	2.0	0.4
4	Firm's Experience	20%	2.0	0.4	1.0	0.2	3.0	0.6	4.0	0.8
	Weighted Score (Experience)		**2.8**	**3.6**	**1.3**	**1.4**	**2.5**	**3.0**	**3.0**	**3.6**
	COMBINED WEIGHTED SCORE		**2.3**	**3.0**	**1.1**	**1.2**	**2.5**	**3.2**	**2.9**	**3.6**
	Ranking of Consultants		**2**		**1**		**3**		**4**	
C	<u>SCOPE OF WORK</u>									
COST/EFFORT			Task Hours	FEE	Task Hours	FEE	Task Hours	FEE	Task Hours	FEE
	TOTAL HOURS AND FEE		16,068	**$824,400**	7,305	**$1,185,310**	17,692	**$1,495,280**	17,601	**$1,947,976**
D	<u>OTHER</u>									
	Separate Resources for CC&B & OUA		No		Yes		Yes		Yes	
	Separate Resource as DBA		No		Yes		Yes		Yes	
	Team Availability in US Time Zones		No		Yes		Yes		Yes	
	Prior Experience Working with IRWD		Yes		Yes		No		No	
	Convert Java to Groovy Scripting (Prepare for Cloud Future)		No		Yes					

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Consulting Services to Upgrade Oracle Customer Care and Billing (CCB) and Oracle Utilities Business Intelligence (OUBI)

Response Due Date: December 18, 2020
Best and Final Offer (BAFO): January 24, 2021

1930 Village Center Circle #3-704 Las Vegas, NV 89134

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1. Cover Letter

A signature by a Principal or officer having the authority to negotiate and contractually bind and extend the terms of the written proposal.

Dear Mr. Saini and Malone:

Origin Consulting, LLC (Origin) has prepared this proposal in response to Irvine Ranch Water District's (IRWD) request for proposal for consulting services to upgrade Oracle Customer Care and Billing (CC&B) and Oracle Utilities Business Intelligence (OUBI) issued on November 9, 2020.

After 14 years in business, Origin has become a name brand across North America for providing top quality services in the utility industry. Our consultants, most of whom have more than 15 years of experience implementing Oracle products, are familiar with industry best practices used for implementations, upgrades, and Meter to Cash (M2C) business operations. In addition, we believe one of our most important key differentiators is our proven track record of building and maintaining a trusted, service-minded relationship with our clients.

We hope you find Origin's capabilities and experience an excellent fit for IRWD's objectives. Origin strives to deliver a level of service in our solutions that are above industry standard and are delivered in a manner that is caring and thoughtful. Our references attest to the validity of our claim.

Origin certifies that all the information in this proposal is true, accurate, and complete. While we believe that this proposal represents an honorable commitment to your organization, it is based on our understanding of the information that you have provided us.

For purposes of inquiry, negotiation, or other matters, please consider me to be Origin's primary point of contact. I have the authority to negotiate and contractually bind and extend the terms of this written proposal.

Thank you in advance for reviewing our proposal. We look forward to learning more about your needs and sharing additional details about our approach during the finalist interview session.

Warmest regards,

Corey Labor, Vice President
Origin Consulting, LLC
clabor@originconsults.com
 802-233-2970

2. Executive Summary

A description of the understanding, approach, and methodology proposed to meet the District's objectives.

Recently, the District won a prestigious award: **Utility of the Future.** This award demonstrates to Origin that partnering on this upgrade is a perfect pairing. Origin is dedicated to leading utility modernization, as evident in the development of our cutting-edge customer self-service offering Origin Customer Experience (OXC) and our mobile work management solution MobileLite.

Since our founding in 2007, Origin Consulting has provided professional business and technical consulting to utility clients using Oracle's Utilities solutions. We are industry leaders: Experts in the Oracle applications that support meter-to-cash (M2C) and field operations. We offer solutions for full or partial application replacements, upgrades, production support, and introduction of new application features. We are an Oracle Implementation Partner and are closely aligned with Oracle product roadmaps and strategies.

This upgrade of CC&B from version 2.4 to 2.7 is a key opportunity to refine legacy business processes, leverage the latest features of the solution, and address pain points experienced with your current deployment of CC&B. The Origin team has successfully guided many of our clients through a very similar scope as what is outlined in your RFP.

The upgrade of OUBI 2.4 to OUA 2.7 enhances IRWD's data replication performance to near real-time leveraging Oracle GoldenGate (OGG) and Oracle Data Integrator (ODI). OUA comes with the latest OBIEE 12c, while introducing new features like powerful visualizations, graphs, heat matrix views, enhanced dashboards, and mobile integration.

"Based on the successful results of the project, my original assertion of Origin's capabilities has been met and exceeded. Artesian continues to be properly positioned to serve our customer needs for the foreseeable future."

Raymond Kelly, Director of IT at Artesian Water Company

Our firm is organized to ensure that all Origin clients have executive oversight. Our executives are hands-on, easy to reach, and have a background in systems integration and Oracle implementations. The firm is founded and built by professional services leaders with utility backgrounds. We have a proven track record of creating current and future success for our clients.

Origin's proposed core team has an average of 15 years in the utility industry and 8 years working with the Oracle Utilities software applications below. This core team is supported by the Origin Technology Center (OTC), our dedicated team of developers with similarly deep knowledge on the Oracle suite of applications.

- Customer Care and Billing (CC&B)
- Customer Cloud Service (CCS)
- Customer to Meter (C2M)
- Oracle Utility Analytics (OUA)

- Oracle Utilities Business Intelligence (OUBI)
- Oracle Cloud Infrastructure (OCI)
- Mobile Workforce Management (MWM)
- Meter Data Management (MDM)
- Smart Grid Gateway (SGG)
- Operational Device Management (ODM)
- Process Integration Pack (PIP)
- Integrations between Oracle Utilities solutions and third-party / legacy solutions

Origin is uniquely qualified to lead IRWD to a successful completion of the CC&B and OUBI upgrade. Our team of experts has years of experience successfully delivering projects to our clients that include all the scope components outlined in your RFP. As the Oracle product suite has evolved, so has our team.

Our most recent success story was a project with another of our clients, City of Tempe, to upgrade their CC&B solution to version 2.7, retire customizations, move the solution from on premise to the Oracle Platform-as-a-Service (PaaS) infrastructure, and migrate all infrastructure and application monitoring responsibilities to our Origin SmartOps Operations team post go-live. We consider our team industry leaders in these areas—we have built a reputation of excellence through these projects with our clients.

Origin looks forward to engaging IRWD to not only succeed with your upgrade project, but to also lay the foundation for IRWD to continue to architect, enhance, and optimize business operations. Our firm is very adept at solving business problems from both business and application perspectives. The Origin team's skills, experience, and culture make us the right partner. Our methodologies and best practices, outlined in this proposal, differentiate our firm from others, large or small.

3. Experience

Provide a brief description of the firm's history, size, and organization. Describe the experience of the firm with performing the following work streams:
- *Conducting the upgrade to Oracle CC&B version 2.7*
- *Performing configuration changes as required by the upgrade.*
- *Automated tools used for testing*
- *Performing remediation of CC&B to improve overall use of the solution*
- *Conducting the upgrade to OUBI/OBIEE*

Company History

Origin Consulting was established in 2007 with a primary focus on providing professional services to Oracle Utilities customers. Since that time, Origin has continued to grow in number of consultants, number of client partnerships, and expansion of our offerings based on our commitment to delivering excellence in the utility industry.

Our business model is focused solely on the utility industry and primarily on Oracle Utilities applications. We provide expert implementation services for the Oracle Utility Application Suite to the utility industry, with a primary focus on CC&B, OUA, C2M, CCS, MWM, MDM and Customer Self Service.

Our team has extensive experience in implementing and upgrading Oracle Utilities Applications utilizing various approaches, such as agile or variations of stage gate models. Origin was involved in the first North American implementations of various Oracle's applications, leading utilities and the market in new technologies. We offer solutions for full or partial application replacements, upgrades, support, and introduction of new application features.

Our consultants have more than 320 years of combined Utility Industry experience and more than 300 years of combined experience in implementing, upgrading and supporting Oracle's Customer Information System (CIS) applications across our practice. In addition to depth of experience, our resources are considered some of the best in the industry in implementing, upgrading, and supporting the Oracle Utilities suite of applications and integrations between them. Many have also held senior level positions at Oracle with specific emphasis on the implementation of large-scale utility projects utilizing Oracle's flagship utility product, CC&B. Our consulting leadership team and Project Managers have also worked primarily in the utility industry with clients across the United States.

Our resources have deep industry experience with an average of 10 years of hands-on experience implementing solutions in the Utility Industry. Our professionals are skilled Project Managers, Functional and Technical Architects, Integration Architects, Conversion Architects, Business Analysts, Trainers, Testers, Designers and Developers certified across the Oracle Utilities application suite. Our resources have experience working with gas, electric, sewer, wastewater, municipal waste, water, and steam utilities.

Over the course of Origin's 14-year history, we have earned a record of being 100% client referenceable and litigation-free in the delivery of upgrades, system implementations, managed services support, and advisory services.

CC&B History

Origin has significant experience implementing, upgrading, supporting, maintaining, and enhancing CC&B alongside the other Oracle Utilities applications that utilize the same framework. We have performed 7 CC&B upgrades as a company since 2015. Our development, functional, and technical capabilities are considered the best in the industry. Many of our team members originated with Oracle, some having worked with the applications since their inception. Our resources are certified by Oracle as CC&B implementation specialists.

Origin's extensive history with CC&B is demonstrated through our successful partnerships, many of which touch specifically on our upgrade capability.

Origin's partnership with ENSTAR exemplifies our ability to upgrade CC&B and lead innovation at the same time. Initially, the ENSTAR upgrade from v2.4 to v2.7 was intended as a technical upgrade only. Early in the project, the client requested additional enhancements to address their specific pain points and leverage new functionality. The new scope was identified, and the change was formalized into the upgrade project.

The enhancements Origin made for ENSTAR included adding a flag in Control Central for customers who are active web self-service users, attaching caution alerts to the customer record rather than at the SA level, and allowing customers to initiate payment arrangements through

the IVR. In total, 15 enhancements were added to the scope, and the team nevertheless achieved the original launch date within the original budget.

Origin partnered with Artesian Water Company (AWC), a utility providing water, wastewater, and service line protection services to approximately 85,000 meters, to upgrade to CC&B 2.6 in November 2018. This upgrade encompassed CC&B, MWM, and Field Work Process Integration Pack (FWPIP). In addition to the application upgrades, Origin collaborated with AWC to reengineer business processes and optimize their meter-to-cash workflow.

Spire, Inc. (Spire) is a natural gas distribution company that Origin has worked with across two CC&B upgrades. Like many utilities, Spire has multiple rates for different customer services. Origin transitioned some of their rates to the new rate engine available in CC&B 2.4. Along with base CC&B functionality, Origin worked on multiple Inbound Web Services (IWS) service enhancements to add new functionality to their Customer Self Service (CSS) portal. Origin is currently leading the effort to migrate an acquired utility onto AWC's CC&B platform, which includes data conversion and M2C business process analysis and optimization for the future state business.

As mentioned in Section 2, the Executive Summary, Origin partnered with the City of Tempe to upgrade their CC&B solution from version 2.3 to version 2.7. We retired customizations, moved the solution from on premise to the Oracle PaaS infrastructure, and migrated all infrastructure and application monitoring responsibilities to our SmartOps Operations team post go-live.

Origin has also worked with Green Mountain Power (GMP) to implement CC&B, along with MDM, MWM, CSS, ODM and Service Oriented Architecture (SOA). As part of the CC&B Implementation, Origin expanded the core functionality of CC&B to Integrate CC&B with the head end system for remote connections and disconnections, thereby eliminating the need for personnel to log into the HES to perform these actions. This was before Oracle had deployed Service Order Management (SOM), which is now included with CCS.

The Origin team has performed upgrades to OUA to configure standard, out-of-the-box ELT loads, reports, and dashboards. Our team has also migrated existing custom OUBI reports into OUA. The team is versed in identifying and remediating functional gaps in existing BI Publisher Reports to validate and migrate to the new OUA. Origin also has extensive knowledge in providing training to the Customer Service staff and Information Service team on the new customizations.

The team most recently upgraded GMP from OUBI v2.4 to OUA v2.7 (converting first to v2.5.2), leading the architecture, planning, and sizing of database servers for multiple BI projects. Performance tuning and patching, including resolving out-of-the-box ETL data issues, were also part of this initiative.

In addition, the team completed an implementation of OUA with Nashville Electric Service (NES). NES uses Oracle's C2M product. The team also coordinated testing efforts and provided training on the reporting and ETL tools.

Defining and deploying various programs to meet marketing objectives enables clients to use base CC&B functionality to create new programs or enhance existing programs. Origin also deployed program management to manage the sale, installation, and billing for heat pumps for GMP.

In 2019, Origin partnered with South Jersey Industries (SJI), a natural gas utility serving 750,000 meters, as they began an upgrade of CC&B (from v2.4 to v2.6) and Maximo (from v7.5 to v7.6.1.1) that was completed in 2020. Origin led the effort to align all application versions across the three SJI Utilities companies and move toward business process standardization.

In terms of automated testing, Origin has performed automated load testing using K6 and LoadNinja to simulate many online users. The Origin team is also versed on Oracle Utilities Testing Accelerator (OUTA) which is deployed in the Origin solutions lab for custom automated testing scenarios. Origin is also a business partner with UiPath, a leader in Robotic Process Automation. With UiPath, Origin has built bots to automate redundant manual processes.

In Origin's technical upgrades, applications are moved to a more current release, and the underlying technology stack including WebLogic and Database are upgraded. As part of this upgrade, custom COBOL must be eliminated. If a base product functionality accomplishes the same business objective, that functionality is deployed through configuration.

4. Team

Provide the specific experience and capabilities, qualifications and resumes of the designated resources assigned to perform the work. Vendor can not replace the resources mentioned in the RFP response with different resources after signing the PSA and for actual project startup. Any changes in personnel resources must be given in writing before PSA signing. After the project kickoff, Personnel resources assigned to the project shall not be reassigned without prior written approval from IRWD. If using sub-consultants, provide the company profile and define the responsibilities and services to be performed by the sub-consultants. Include the primary point of contact, person responsible for overall corporate commitment (Principal) and project manager. Describe the responsibilities of the individuals who will be working on the project and extent of involvement with the project. Include a schedule showing the percentage of time each member will contribute to the project. IRWD is open to leveraging on-site, off-site and off-shore resources as appropriate for project success. Due to the current Covid situation, IRWD is open to execute this project entirely remotely, however, during the implementation or close to Go Live, if the situation improves, IRWD expects the key resources to be present on-site. While working remotely on the project, the key resources assigned to the project should be available for online meetings at US Pacific Standard Time (PST) zone.

During COVID restrictions, the project is implemented remotely. However, the goal is to work onsite once it is safe to do so. We understand our clients desire varying levels of onsite presence and we can be flexible in our approach. Our experience has been that the typical cadence for a project of this type is 1 week onsite, 3 weeks offsite. Origin employs a mix of on-shore and off-shore resources, although most of the team resides in the United States. The team is onsite during the week before and weeks immediately after go-live.

All Origin team members are available during US Pacific Standard Time business hours.

The team members listed below guide IRWD through the upgrade. In the following table, we have provided a synopsis of their experience relevant to this upgrade and the role(s) they fulfill. Full resumes for each team member are also provided after the Appendices section at the end of this proposal.

The lead point of contact for this response is your account executive, Corey Labor (clabor@originconsults.com / 802.233.2970).

Team Members	Role & Relevant Experience
Corey Labor	**Account Executive—**Provides oversight of the engagement to ensure the Origin team is delivering quality and working in the best interest of IRWD. Acts as a point of escalation to resolve any issues that may affect the success of the project. **Experience -** Corey has over 21 years of experience providing leadership for teams and enterprise projects. He has spent the last 17 years specifically dedicated to the utility industry providing leadership for the execution of complex M2C system implementation projects. These projects have encompassed solutions such as CIS Utility Billing, MDM, MWM, CSS, and Operational Device Management (ODM), as well as other utility solutions. Corey has also served as an Account Executive on projects for Spire Energy in their upgrade from CC&B v2.4 to v2.6 and AWC in their upgrade from CC&B v2.3 to v2.6 and understands some of the project pain points.
Mechelle Davidson	**Project Manager—**Responsible for the overall Origin project performance, and the execution and acceptance of all Origin statement of work (SOW) deliverables. Understands the project business objectives and has a clear vision of how to achieve those objectives. Resolves the conflict among the differing objectives of the various parties to the project. Primarily faces outwards from the project and handles project issues and ensures they do not impede the project. Makes sure the project work remains within the agreed upon scope, and guards against scope creep. Reviews major work products - particularly those from the earlier phases of the project. Responsible for comparing the project planning, resourcing, monitoring, and reporting progress against the plan. Responsible for ensuring that activities are performed. **Experience -** Mechelle has more than 20 years of experience in the utility space. She has worked with both regulated and deregulated markets in several states throughout the United States. She has worked on several CIS platforms, including CC&B, SAP for Utilities, Banner, ABP3000, and Peace Energy, among others. Mechelle served as the Project Manager for the ENSTAR Natural Gas upgrade to CC&B 2.7.
Melgar Oleas	**Technical Architect Lead—**Responsible for overseeing all technical deliverables during the project**.** Provides quality assurance oversight on all environment, data, and technical areas. **Experience -** Melgar is an experienced and skilled technical architect for the Oracle Utilities Product Suite with a focus on CC&B and MDM. Melgar has completed CC&B v2.7.0.3.0 upgrades for ENSTAR Natural Gas and the City of Tempe as the Technical Architect.
Alfred Felipe	**Technical Architect—**Key resource for delivering technical cutover activities. Manages project environments and troubleshoots database and environment performance. **Experience -** Alfred has over eleven years of experience delivering customer implementation solutions for Oracle Utilities applications such as CC&B, MDM, MWM, CSS, andC2M as a Technical Architect. Alfred has been a part of numerous implementations and upgrades, including AWC's upgrade from CC&B

Team Members	Role & Relevant Experience
	v2.6.0 and MWM v2.3.0, SJI's upgrade from CC&B v2.6.0.1 and MWM v2.3.0, and ENSTAR's upgrade CC&B DEV from v2.4 to v2.7.0.3.
Madhur Jain (MJ)	**Solution Architect—**Identifies those areas within the current solution requiring transformation. Facilitates the effort necessary to identify reports, configuration, conversion, enhancements, and workflow. Proposes specific solutions that fit within the enterprise's business environment and business objectives and can be shown to address the business problems and exploit opportunities. **Experience –** MJ has over twelve years of Customer Information System (CIS) Software Development Life cycle (SDLC) experience in the gas, electric, and water industries. Madhur has led multiple CC&B Implementations in multiple leadership roles such as Solution Architect and Functional Lead Architect. His projects include SJI's upgrade from CC&B 2.4 to 2.6.0.1, MID's implementation of CC&B 2.5, and AWC's upgrade from CC&B 2.3 to 2.6.
Diane Lampa	**Designer / Developer—**Develops technical solution designs. Participates in understanding business requirements and turns them into functional and technical designs for IRWD approval and development. **Experience –** Diane has over 14 years of experience working on customizations to Oracle Utilities applications, with an emphasis on CC&B. She has participated in various phases of the implementation process including design, development, testing, and support. Diane has been a part of numerous implementations and upgrades such as Spire's CC&B 2.6 upgrade, AWC's upgrade from CC&B 2.3 to CC&B 2.6, and MID's implementation of CC&B 2.5.
Joshua "Ace" Vitug	**Developer—**Develops technical solution designs. Code development, configuration, and testing for the CC&B application. Develop documentation and runbooks necessary to support CC&B after go-live. **Experience –** Ace has more than 5 years of experience creating components, unit testing, and providing client support for OUAF applications using the prescribed SDLC standards. He has created custom components for CC&B using Java, COBOL, and the Oracle Service Bus (OSB). Ace has been a part of numerous upgrades such as Tempe's CC&B 2.7 upgrade enhancements Spire's CC&B 2.6 upgrade enhancements, and CC&B 2.6 upgrade enhancements for Orlando Utilities Commission (OUC).
Venkat Dongara	**Analytics Architect—**Analyzes the current OUBI environments and provides hardware config required for new servers. Works on new OUA environments build and upgrade, configure out of the box ELTs, Reports and Dashboards. Migrate all custom OUBI objects and BI Publisher reports into OUA, Setup daily ETL loads, define OBIEE security, backup, and migration strategies. Conducts the necessary admin trainings to the client's team. **Experience –** Venkat has over 20 years of experience in Data Warehousing, Data Integration, and Business Intelligence (BI) using industry standards and advanced Data Visualization and ETL tools. He has successfully implemented numerous Oracle BI Solutions for Oracle Utilities Applications like CC&B, MDM, and MWM, as well as for Oracle ERP Systems like EBS and PeopleSoft. Venkat recently completed an implementation of OUBI 2.4 for CC&B, MDM and MWM applications for GMP.

Team Members	Role & Relevant Experience
Nechal Singh	**Analytics Developer—**Analyzes all custom ETLs and reports, identify the changes needed and fix them. Works with client to understand new requirements, then design, develop and test new ETL interfaces, OBIEE and BI Publisher reports. Conducts the necessary training on reports usage to the end users. **Experience —**Nechal has over 13 years of experience working in Data Warehousing, Data Integration, and BI in various industries including Utilities, Government, Energy, and Capital markets. He has experience in CC&B, OUA, and C2M. Nechal has been a part of numerous upgrades, including Nashville Electric Service, where he configured the OUA admin tool to feed information for Revenue Analytics. He was also part of the Pacific Gas and Electric project, where he managed the installation and configuration of the ETL and front-end reporting stack across environments.
Jinelle D'Souza	**CC&B Functional Architect / Training Lead -** Works with clients to define solution requirements and map those requirements to the solution. Conducts the analysis necessary to understand risks, assumptions, and dependencies associated with the business processes and applications. Manages all aspects of training including class agenda, class material and data, and training delivery. Responsible for customer enablement and transition. **Experience —**Jinelle has been involved in four $20-$40M revenue recovery projects as part of a SWAT Team to alleviate delayed revenue. Jinelle has implemented several processes for client billing efficiency, leak adjustment management, field work, collections, and to-do management.

The table below identifies the Origin project team member roles and the percentage of time that they are engaged in the project throughout each of the project lifecycle Origin methodology OnPoint phases: Engage, Enable, Construct, Confirm, and Transition & Operate (T&O).

Allocation % for Origin Resources

Name	Role	Engage	Enable	Construct	Confirm	T & O
Mechelle Davidson	Project Manager	100%	100%	51%	67%	45%
Melgar Olaes	Technical Architect Lead	100%	100%	86%	100%	41%
Alfred Felipe	Technical Architect	--	25%	26%	8%	--
MJ Jain	Solution Architect	73%	100%	72%	80%	39%
Jinelle D'Souza	CC&B Functional Architect	--	100%	72%	52%	30%
	Training Lead	17%	--	9%	28%	11%
Diane Lampa	Designer / Developer	38%	38%	56%	5%	8%

Allocation % for Origin Resources						
Name	**Role**	**Engage**	**Enable**	**Construct**	**Confirm**	**T & O**
Ace Vitug	Developer	--	56%	56%	35%	15%
Venkat Dongara	Analytics Architect	--	50%	100%	75%	32%
Nechal Singh	Analytics Developer	--	50%	100%	79%	28%

5. Project Approach and Timeline

Provide a work plan, including major activities and schedule for the project, deliverables and milestone dates. Provide a detailed scope of work and the upgrade / implementation methodology. Describe how you will approach each of the tasks outlined in the scope of work, including interaction with District staff. The description shall comprehensively define and describe the individual tasks for the work effort. Outline in detail a phased project approach to accomplish both CC&B and OUBI upgrades. The project plan should be provided with each task and sub task represented. Alternatively, project plan can be in a format providing in-depth details covering each phase of the project and summarizing in a way to cover all tasks and subtasks.

Using Origin's onPoint methodology as a backbone for the project, it will take 10 months to achieve all the Project Objectives. Based on your goals and our experience, we recommend a single-phase go-live approach, with OUA launching one day after CC&B. Together, we agree on the plan that upgrades and readies your systems in the first 7 months and provide requested hypercare for 2 months post go-live. This "Big Bang" approach enables the teams to efficiently and effectively upgrade both applications as an entire solution. It also mitigates risks around environment management, duplicative testing, and extended timelines. The project timeline is based on the collective experience working with similar customers to achieve similar goals. These customers are now experiencing the rewards of operating on stable, supported versions, while taking advantage of newer technologies and advances in base functionality.

The chart in figure 1 presents the proposed 9-month timeline for upgrading CC&B and OUBI, according to your scope and objectives, which are listed below. Origin works with IRWD to develop a project timeline based on your organizational needs to perform the upgrade, testing, training, and hypercare support.

- Perform Technical Upgrade of the CC&B Application (v2.4 to v2.7)
- Install Oracle Utilities Analytics (OUA)
- Remediate and Test Customizations, Interfaces and Batches
- Set Up ETL Batches in CC&B for Oracle Utilities Analytics (OUA)
- Configure and Validate Oracle Standard Out of the Box (OOB) Reports and Customized OUBI Reports to OUA
- Remediate, Validate and Migrate BI Publisher (BIP) Reports from OUBI to OUA.
- Customize and Extend Data Warehouse, ETL, and OBIEE Metadata
- Launch Oracle CC&B and OUA Disaster Recovery (DR) on Cloud
- Training End Users on CC&B and OUA
- Post-Production Support (2 Months)

The approach outlined below was built and refined over the last 14 years as part of the Origin methodology. For many of our team, this expertise in implementing, upgrading, and maintaining Oracle Utilities solutions extends well beyond those years. This experience, combined with the knowledge of IRWD's staff and systems due to our direct involvement in the Paymentus integration project, is what builds our confidence in delivering this upgrade to IRWD in the 10-month timeline described over the following pages. Origin has many lessons learned from similar engagements. These, along with key insights from our involvement with product direction and customer groups, allow us to provide IRWD with expert guidance.
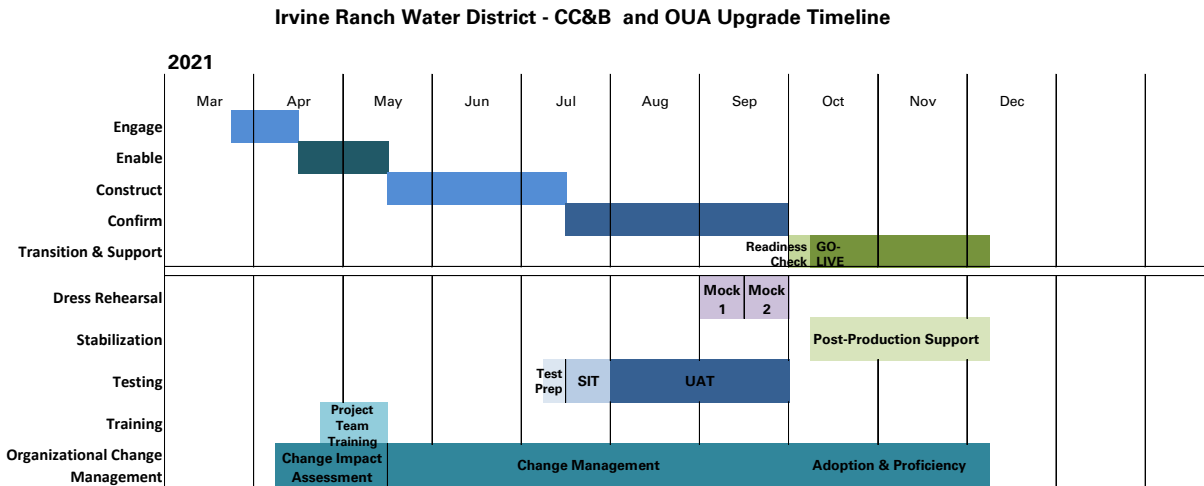
Figure 1 – IRWD Upgrade Timeline

Proposed Upgrade Approach

onPoint, the delivery methodology, is a hybrid methodology organized by specific phases with embedded agile concepts. This approach provides the structure necessary to deliver IRWD's upgrade while allowing for more rapid feedback and delivery. Project phases span the complete software lifecycle. onPoint provides a transformation framework to deliver the CC&B and OUA upgrades in a collaborative manner. onPoint is designed to create a business solution—not simply to upgrade software. Our approach focuses teams on designing and delivering effective results.

The project phases illustrated in *Figure 2* span the complete software lifecycle. For each project phase, specific tasks, deliverables, dependencies, and milestones are defined. Each phase builds on the previous phase(s), ensuring that decisions are consistent with the core design of the solution.
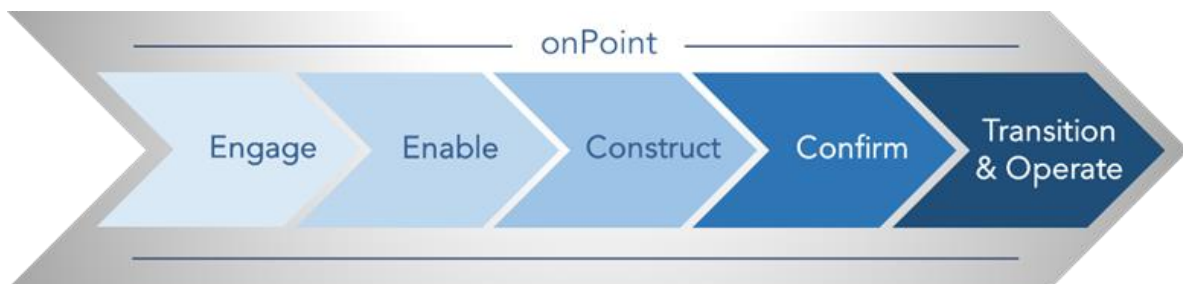
Figure 2 - onPoint Delivery Methodology

- **Engage Phase** – Define project objectives and mobilize the team
- **Enable Phase** – Establish the point of origin for the project and share the approach
- **Construct Phase** – Construct, configure, and validate the solution
- **Confirm Phase** – Test, train, and prepare for go-live
- **Transition & Operate Phase** – Deploy to production and stabilize operations

Engage - Define the project objectives and mobilize the team

Phase Objectives:
- Set expectations for the entire project
- Conduct workshops to compare and contrast the current / new features of CC&B and OUA to determine business process impacts
- Train IRWD's project team on Origin's agile approach for the initiative
- Deploy a copy of IRWD's OUBI and CC&B environments in Origin's solution lab
- Upgrade/deploy the IRWD DEV environments

Description:
During the Engage phase, Origin facilitates workshops to identify existing processes, challenges, and pain points experienced with IRWD's M2C processes, as well as helping search for potential process improvement opportunities to be initiated with the upgraded CC&B and OUA applications. We feel it's critical to also understand your innovation roadmap as it relates to your M2C processes and customer service offerings to ensure the upgraded solutions are best positioned to support future initiatives. Documenting the current state and identifying an improved to-be state, allows Origin and IRWD to collaborate on a project roadmap that carries forward into the Enable phase. In addition, the Origin Technical Architect works with IRWD technical staff to review current deployment landscape as well as plan and execute the upgrade of the Development (DEV) environments.

Key Activities:
- Identify key stakeholders and levels of engagement
- Establish project governance
  - Document and communicate the project charter
  - Document and communicate the project plan and baseline project schedule
  - Establish and initiate project status reporting
- Define workshop logistics (e.g., who should be involved, time commitment from various stakeholders, etc.)
- Conduct workshops to provide the Origin team a shared understanding of the current application infrastructure and solution architecture
- Create the Enable phase workshop schedule
- Deliver agile (i.e. project methodology) foundation training
- Provide inventory of customizations, integrations, reports, and dashboards
- Grant access to integration/network documentation and environments
- Document upgrade procedures for development environments and begin lower environment upgrade activities

Enable – Establish the point of origin for the project, share the approach

Phase Objectives:
- Upgrade/deploy the IRWD TEST environments
- Review differences between current features and functionality for CC&B and OUBI to versions being proposed for implementation
- Schedule and conduct user story workshops (to define requirements and user acceptance test scenarios)
- Define functional design/configuration parameters to support existing business processes that could be impacted by changes in the new versions of CC&B and OUA
- Prepare project team and key stakeholders for the Construct phase

Description:
The team utilizes workshops during the Enable phase to gather initial information and determine the detailed approach to transition to the new versions of CC&B and OUA. Origin documents IRWD functional and technical requirements, including acceptance criteria. During these workshops, the project team prioritizes the requirements and identifies the ones necessary for go-live.

Once requirements have been gathered and prioritized, the team reviews the Construct phase activities. This includes the iterative configuration process, Origin's agile methodology, and expectations for Origin and IRWD.

Key Activities:
- Provide an overview of CC&B v2.7 and OUA v2.7 functional capabilities
  - Prepare a project team training plan
  - Deliver project team training to IRWD
- Capture functional requirements for business processes that may be impacted by the upgraded systems.
- Create functional and technical requirements, including both acceptance criteria (how the requirement is successfully validated) and demo instructions (how the feature/functionality will be demonstrated to IRWD)
- Document interfaces and reports
  - Confirm the interface and report inventory
  - Identify any impacts to reports or interfaces due to changes in schemas
- Validate security parameters
- Document validation (testing) approach
  - Utilize the user story acceptance criteria to define formal test scenarios
  - Partner with IRWD to craft a testing plan including resources, activities, and timeline
- Refine user story delivery schedule
  - Combine the prioritized backlog of user stories and Construct phase calendar to define the schedule, activities, and effort
  - Categorize user stories into sprints to provide a high-level view of the detailed sprint schedule
- Conduct technical upgrade workshops
- Prepare high level environment upgrade strategy

Construct - Construct, configure, and validate the solution

Phase Objectives:
- Prepare the application environment for configuration activities
- Upgrade the test environment to CC&B 2.7
- Upgrade the test environment to OUA 2.7
- Establish CC&B and OUA disaster recovery (DR)
- Continue to refine the Construct phase calendar
- Validate functionality

Description:
For IRWD's CC&B upgrade, Origin employs a hybrid of waterfall and agile project methodologies. The onPoint phases Engage and Enable follow a more traditional waterfall strategy. During the Construct phase, the strategy transitions to an agile approach, which has been proven to be a more effective method for building the solution changes and increasing the speed of adoption. Agile projects use an iterative process of configuring and validating the solution as illustrated in Figure 3 - Agile Iterative Process.
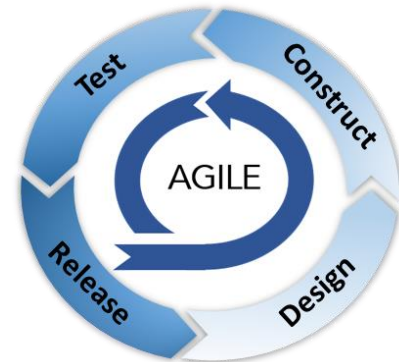
Figure 3 - Agile Iterative Process

Using the requirements that were captured in the Enable phase, the team creates solution blueprints to document the configuration changes for the solution. Following the solution blueprints, the team configures the solution. Requirements are grouped into logical categories, enabling the team to set the timeline for the features and functionality to be delivered.

Work is broken up into three-week periods known as sprints. At the beginning of each sprint, the team commits to the requirements and the progress to be demonstrated to IRWD at the conclusion of each sprint. Once configured, the team performs testing to ensure it is working as intended.

The Construct phase includes several meetings in which the teams continually review progress and adjust their trajectory if necessary. At the beginning of each sprint, requirements are reviewed and prioritized, and a set of requirements is committed for completion in that sprint. This is known as the sprint planning meeting. Sprint planning allows the team to agree upon the work to be completed next.

Midway through each sprint, the team engages in a refinement activity in which the list of requirements is reviewed again and reprioritized, if necessary, to identify the next set of features and functionality to be constructed. At the conclusion of the sprint, the team conducts a sprint review with the larger project team to demonstrate features and functionality created during the sprint if applicable.

Finally, the core team participates in a retrospective meeting at the end of each sprint. This meeting serves as an opportunity for team members to provide feedback (both positive and constructive) to increase the effectiveness of future sprints.

The OUA upgrade adopts a slightly different path, following the waterfall methodology. As with the CC&B upgrade, the team uses the Engage and Enable phases to identify out of the box ETL

loads, reports, and dashboards, and to determine any new custom reports. This is a two-phase upgrade, first moving from v2.4 to v2.5 and then upgrading to v2.7, accomplished during the Construct phase. In addition, the DR OUA database is created during Construct. The OUA upgrade moves from the Construct phase to the Confirm phase at the same time as the CC&B upgrade, allowing testing of both systems to occur during the same period.

Key Activities:
- Prioritize and commit requirements
  - IRWD reviews the prioritized requirements with the team to gain approval
  - Requirements are reviewed and sized, enabling the team to understand how many requirements can be completed during the allotted sprint timeframe
  - The core team commits to complete specific requirements during the specified sprint
- Configure features and functionality
- Unit testing is performed on the completed configuration
- Conduct and attend sprint ceremonies
  - Project team members attend the following meetings and ceremonies throughout each sprint:
    - Sprint planning
    - Requirement refinement
    - Sprint review / demo
    - Retrospective
    - Daily stand-up meetings for the core project team (known as *daily scrums*)
  - Based on acceptance criteria and demo instructions gathered for each requirement, IRWD approves the resulting configuration as demonstrated during the review sessions
  - Establish disaster recovery for CC&B and OUA

Key Deliverables:
- Updated Construct phase calendar
- List of requirements
- Sprint demo agenda
- System integration and user acceptance test scenarios
- Testing strategy

Confirm - Test, train, and prepare for go-live

Phase Objective(s):
- Confirm existing functionality
- Validate new features and functionality from upgraded systems
- Create and deliver training instruction to end-users and technical resources
- Perform operational-readiness activities to ensure IRWD is prepared for launch

Description:
During the Confirm phase, specific activities are carried out to ensure that both the systems and the people are ready for the launch of the new system. Using the acceptance criteria that were gathered during the requirement workshops as well as the standard regression testing scenarios, the project team tests the new solution to ensure it functions as expected.

The IRWD team is trained to support the new system from both an end-user and technical perspective. Teams complete the operational-readiness checklist to step through the activities that occur from acceptance testing to launch.

Key Activities:
- Coordinate user-acceptance testing
  - IRWD's team leads the testing effort, with Origin coordinating activities to ensure testing is completed within the established timeframe
  - Defects are formally logged and completed, and IRWD retests to ensure the functionality works as documented
- Ensure IRWD validation / approval of functionality
  - IRWD provides written approval upon completion of validation and acceptance of the new functionality
  - Establish exit criteria to move from the Confirm phase to the Transition & Operate phase
- Complete mock cutovers
- Develop and deliver training
  - The Origin project team gives IRWD access to the training materials
  - Origin collaborates with IRWD to conduct CC&B training sessions
  - Origin provides training for OUA to the IRWD support team

Transition & Operate - Deploy the solution to production and stabilize operations

Phase Objective(s):
- Confirm that the upgraded systems are accepted by IRWD and that IRWD is ready to transition
- Launch the upgraded systems
- Effectively manage the transition to steady-state operations

Description:
The goal of the Transition & Operate phase is to deploy the upgraded systems into the organization. All elements must come together to transition successfully to active production use.

During Transition & Operate, the configuration that was validated during the Confirm phase is moved to the production CC&B and OUA environments along with the validated integrations and extensions. A final validation review is conducted with users and stakeholders to verify that the systems are ready for production use, and an assessment is made of operational readiness. The phase culminates with the new systems being put into use. CC&B is upgraded during a weekend maintenance window, with the three-month hypercare period beginning immediately after the upgrade is complete. The OUA upgrade is expected to launch one day after the CC&B upgrade, with the eight-week hypercare period beginning immediately thereafter.

Once active use of the system begins, steady-state operations are managed. This includes hypercare support, final acceptance of the system, and closeout of the project and related processes. Once the production solution has been verified and handed over for normal business operations, Origin prepares a series of artifacts including the project summary and stabilization report and the project closeout letter.

Key Activities:

- Ensure operational readiness
  - o Work with IRWD to complete operational readiness checklists, ensuring all team members are prepared to support deployment
  - o Verify that the Transition & Operate phase implementation checklist has been completed
- Review and approve all phase deliverables
- Confirm go-live resource requirements

The following work plan provides a view of the tasks and sub-tasks that are conducted during IRWD's upgrade project, including deliverables (identified by the word "Deliverable" before the task name) and milestones (identified by the word "MILESTONE" before the task name).

ID	WBS	Task Name	Duration	Start	Finish	Predecessors
		IRWD Upgrade Schedule				
1	1	IRWD CCB 2.4.0.1 to 2.7 Upgrade	184 days	Mon 3/22/21	Fri 12/03/21	
2	1.1	Initiation	15 days	Mon 3/22/21	Fri 4/9/21	
3	1.1.1	SOW Signed	1 day	Mon 3/22/21	Mon 3/22/21	
4	1.1.2	PMO Office Setup	1 day	Tue 3/23/21	Tue 3/23/21	3
5	1.1.3	Project Plan Development	2 days	Wed 3/24/21	Thu 3/25/21	4
6	1.1.4	Draft Plan Delivered to Customer	1 day	Fri 3/26/21	Fri 3/26/21	5
7	1.1.5	Project Plan Finalized	1 day	Fri 3/26/21	Fri 3/26/21	6FF
8	1.1.6	Provide Origin with Code Promotion Procedure Document	1 day	Wed 3/24/21	Wed 3/24/21	4
9	1.1.7	Deliverable D01 - Project Plan	0 days	Mon 3/29/21	Mon 3/29/21	7
10	1.1.8	Deliverable D02 - Communications Plan	0 days	Mon 3/29/21	Mon 3/29/21	7
11	1.1.9	MILESTONE M01 - Project Management Plans	0 days	Fri 3/26/21	Fri 3/26/21	9
12	1.1.10	Origin Solution Lab Setup	15 days	Mon 3/22/21	Fri 4/9/21	

	IRWD Upgrade Schedule					
ID	WBS	Task Name	Duration	Start	Finish	Predecessors
13	1.1.10.1	Provide Origin with IRWD Env (config, code, schema)	5 days	Mon 3/22/21	Fri 3/26/21	
14	1.1.10.2	Provide Origin with Code Promotion Procedure Document	5 days	Mon 3/29/21	Fri 4/2/21	13
15	1.1.10.3	Initial Environment Review	5 days	Mon 3/29/21	Fri 4/2/21	13
16	1.1.10.4	Compare databases to identify differences	5 days	Mon 3/29/21	Fri 4/2/21	13
17	1.1.10.5	Analysis for any customizations	5 days	Mon 3/29/21	Fri 4/2/21	13
18	1.1.10.6	Smoke Test Environment	5 days	Mon 4/5/21	Fri 4/9/21	17
19	1.2	Engage (3 Weeks)	15 days	Mon 3/22/21	Fri 4/9/21	
20	1.2.1	On-Site Project Kick Off	5 days	Mon 3/22/21	Fri 3/26/21	3SS
21	1.2.2	Provide Inventory of Customizations	5 days	Mon 3/22/21	Fri 3/26/21	3SS
22	1.2.3	Provide Inventory of Reports/Dashboards	5 days	Mon 3/22/21	Fri 3/26/21	3SS
23	1.2.4	Provide Access to Integration/Network Documentation	5 days	Mon 3/22/21	Fri 3/26/21	3SS
24	1.2.5	Remote Review of Current Configuration	5 days	Mon 3/22/21	Fri 3/26/21	3SS
25	1.2.6	Code Promotion Procedure Review	5 days	Mon 3/22/21	Fri 3/26/21	3SS
26	1.2.7	Discover Workshop CC&B	5 days	Mon 3/29/21	Fri 4/2/21	
27	1.2.7.1	Technical Upgrade Q&A	5 days	Mon 3/29/21	Fri 4/2/21	23
28	1.2.7.2	Database Changes Q&A	5 days	Mon 3/29/21	Fri 4/2/21	23
29	1.2.7.3	Environment Analysis Q&A	5 days	Mon 3/29/21	Fri 4/2/21	23
30	1.2.7.4	CC&B 2.7 Q&A	5 days	Mon 3/29/21	Fri 4/2/21	23

ID	WBS	Task Name	Duration	Start	Finish	Predecessors
		IRWD Upgrade Schedule				
31	1.2.7.5	Custom Code Analysis Q&A	5 days	Mon 3/29/21	Fri 4/2/21	23
32	1.2.7.6	Review Testing Procedures and Defect Management	5 days	Mon 3/29/21	Fri 4/2/21	23
33	1.2.7.7	Review Status Reporting	5 days	Mon 3/29/21	Fri 4/2/21	23
34	1.2.7.8	Finalize and Approve Project Schedule	5 days	Mon 3/29/21	Fri 4/2/21	23
35	1.2.8	CC&B Environment Builds	11 days	Fri 3/26/21	Fri 4/9/21	
36	1.2.8.1	Submit Request for Upgrade Environments	1 day	Fri 3/26/21	Fri 3/26/21	23FF
37	1.2.8.2	Take DB Snapshot for DEV	1 day	Mon 3/29/21	Mon 3/29/21	36
38	1.2.8.3	Dev Environment	9 days	Tue 3/30/21	Fri 4/9/21	
39	1.2.8.3.1	Build a New Database on Target Oracle Version	5 days	Tue 3/30/21	Mon 4/5/21	37
40	1.2.8.3.2	Export Production Data Model and Import into Target New Oracle Version	5 days	Tue 3/30/21	Mon 4/5/21	37
41	1.2.8.3.3	Execute Update Scripts to Migrate Data from 2.4 to 2.7 (CC&B and OUA)	5 days	Tue 3/30/21	Mon 4/5/21	37
42	1.2.8.3.4	Build a New Application Server for CC&B and OUA 2.7	5 days	Tue 3/30/21	Mon 4/5/21	37
43	1.2.8.3.5	Build Native Weblogic domain	5 days	Tue 3/30/21	Mon 4/5/21	37
44	1.2.8.3.6	Document Upgrade Procedures for DEV	5 days	Tue 3/30/21	Mon 4/5/21	37
45	1.2.8.3.7	Deploy customizations into upgraded environments	5 days	Tue 3/30/21	Mon 4/5/21	37
46	1.2.8.3.8	Smoke Test Environment (Basic Navigation)	2 days	Mon 4/5/21	Tue 4/6/21	45FS-1 day
47	1.2.8.3.9	Verify & Test Integrated DEV (SP)	3 days	Wed 4/7/21	Fri 4/9/21	46
48	1.3	Deliverable D03 - Project Kick-Off Materials	0 days	Mon 3/29/21	Mon 3/29/21	20

	IRWD Upgrade Schedule					
ID	WBS	Task Name	Duration	Start	Finish	Predecessors
49	1.4	Deliverable D04 - Customizatons Inventory	0 days	Mon 3/29/21	Mon 3/29/21	21
50	1.5	MILESTONE M02 - Engage Phase Complete	0 days	Fri 4/9/21	Fri 4/9/21	12,19,26,35,38,85
51	1.6	Close Engage Phase	1 day	Fri 4/9/21	Fri 4/9/21	26,35,85
52	1.7	Enable (4 Weeks)	20 days	Mon 4/12/21	Fri 5/7/21	
53	1.7.1	Test Environment	20 days	Mon 4/12/21	Fri 5/7/21	
54	1.7.1.1	Test Environment Hardware Available	1 day	Mon 4/12/21	Mon 4/12/21	51
55	1.7.1.2	Test Environment Build	15 days	Tue 4/13/21	Mon 5/3/21	54
56	1.7.1.3	Test Environment Verify & Test	4 days	Tue 5/4/21	Fri 5/7/21	55
57	1.7.2	Conduct Functional Requirements Workshops	10 days	Mon 4/12/21	Fri 4/23/21	
58	1.7.2.1	Core Team Training - Part 2.1	5 days	Mon 4/12/21	Fri 4/16/21	
59	1.7.2.1.1	Update Core Team Training Documentation	1 day	Mon 4/12/21	Mon 4/12/21	38
60	1.7.2.1.2	Deliver Core Team Training	4 days	Tue 4/13/21	Fri 4/16/21	59
61	1.7.2.2	Core Team Training - Part 2.2	5 days	Mon 4/19/21	Fri 4/23/21	
62	1.7.2.2.1	Deliver Core Team Training	5 days	Mon 4/19/21	Fri 4/23/21	60
63	1.7.3	Design Review of Customizations, Integrations, and Interfaces	20 days	Mon 4/12/21	Fri 5/7/21	
64	1.7.3.1	Review Customizations (761)	20 days	Mon 4/12/21	Fri 5/7/21	59SS
65	1.7.3.2	Review Integrations/Interfaces (33)	20 days	Mon 4/12/21	Fri 5/7/21	59SS
66	1.7.3.3	Review Reports/Dashboards (147)	20 days	Mon 4/12/21	Fri 5/7/21	59SS
67	1.7.3.4	Review Design Docs	20 days	Mon 4/12/21	Fri 5/7/21	59SS

ID	WBS	Task Name	Duration	Start	Finish	Predecessors
		IRWD Upgrade Schedule				
68	1.7.3.5	Review Fit-Gap Analysis	20 days	Mon 4/12/21	Fri 5/7/21	59SS
69	1.7.3.6	Review Report Design Docs	20 days	Mon 4/12/21	Fri 5/7/21	59SS
70	1.7.3.7	Develop Future State Roadmap	20 days	Mon 4/12/21	Fri 5/7/21	59SS
71	1.7.3.8	Develop Training Needs Assessment	20 days	Mon 4/12/21	Fri 5/7/21	59SS
72	1.7.3.9	Develop User Stories	20 days	Mon 4/12/21	Fri 5/7/21	59SS
73	1.7.4	Conduct Technical Upgrade Workshops	5 days	Mon 5/3/21	Fri 5/7/21	
74	1.7.4.1	Environment	5 days	Mon 5/3/21	Fri 5/7/21	63FF
75	1.7.4.2	Database	5 days	Mon 5/3/21	Fri 5/7/21	63FF
76	1.7.4.3	Interfaces	5 days	Mon 5/3/21	Fri 5/7/21	63FF
77	1.7.4.4	Reports/Dashboards	5 days	Mon 5/3/21	Fri 5/7/21	63FF
78	1.7.4.5	Conversion	5 days	Mon 5/3/21	Fri 5/7/21	63FF
79	1.7.4.6	Performance Planning	5 days	Mon 5/3/21	Fri 5/7/21	63FF
80	1.7.4.7	Auditability Planning	5 days	Mon 5/3/21	Fri 5/7/21	63FF
81	1.7.4.8	Security Planning	5 days	Mon 5/3/21	Fri 5/7/21	63FF
82	1.7.4.9	Availability Planning	5 days	Mon 5/3/21	Fri 5/7/21	63FF
83	1.7.4.10	Capacity Planning	5 days	Mon 5/3/21	Fri 5/7/21	63FF
84	1.7.4.11	Interoperability Planning	5 days	Mon 5/3/21	Fri 5/7/21	63FF
85	1.7.5	Discover Workshop OUA	5 days	Mon 5/3/21	Fri 5/7/21	
86	1.7.5.1	Technical Upgrade Q&A	5 days	Mon 5/3/21	Fri 5/7/21	73SS

ID	WBS	Task Name	Duration	Start	Finish	Predecessors
		IRWD Upgrade Schedule				
87	1.7.5.2	Database Changes Q&A	5 days	Mon 5/3/21	Fri 5/7/21	73SS
88	1.7.5.3	Environment Analysis Q&A	5 days	Mon 5/3/21	Fri 5/7/21	73SS
89	1.7.5.4	OUA 2.7 Q&A	5 days	Mon 5/3/21	Fri 5/7/21	73SS
90	1.7.5.5	Custom Code Analysis Q&A	5 days	Mon 5/3/21	Fri 5/7/21	73SS
91	1.7.6	Prepare High Level Environment Strategy	10 days	Mon 4/26/21	Fri 5/7/21	
92	1.7.6.1	Review /Approve Draft Solution Blueprint Documents	10 days	Mon 4/26/21	Fri 5/7/21	63FF
93	1.8	DELIVERABLE D05 - High Level Environment Strategy Document	0 days	Fri 5/7/21	Fri 5/7/21	74
94	1.9	DELIVERABLE D06 - Interface Strategy and Plan Document	0 days	Fri 5/7/21	Fri 5/7/21	92
95	1.1	MILESTONE M03 - Enable Phase Complete	0 days	Fri 5/7/21	Fri 5/7/21	53,57,63,73,91
96	1.11	Close Enable Phase	0 days	Fri 5/7/21	Fri 5/7/21	53,57,63,73,91
97	1.12	Construct (10 Weeks)	58 days	Mon 5/10/21	Fri 7/30/21	
98	1.12.1	Prepare High-Level Data Migration Strategy	5 days	Mon 5/10/21	Fri 5/14/21	
99	1.12.1.1	Create Data Migration / Remediation Strategy Document	5 days	Mon 5/10/21	Fri 5/14/21	96FS+1 day
100	1.12.1.2	Conduct Data Migration / Remediation Strategy Review and Approval	1 day	Fri 5/14/21	Fri 5/14/21	99FF
101	1.12.2	DELIVERABLE D07 - High Level Migration / Remediation Strategy Document	0 days	Fri 5/14/21	Fri 5/14/21	100
102	1.13	OUA Upgrade Development	58 days	Mon 5/10/21	Fri 7/30/21	
103	1.13.1	Install OUASA 2.4 to 2.7	58 days	Mon 5/10/21	Fri 7/30/21	98SS
104	1.13.2	Setup/Configure standard out of the box ELT loads, Reports and Dashboards and migrate existing custom OUBI reports into OUA	58 days	Mon 5/10/21	Fri 7/30/21	98SS

		IRWD Upgrade Schedule				
ID	**WBS**	**Task Name**	**Duration**	**Start**	**Finish**	**Predecessors**
105	1.13.3	Identify functional gaps in existing BI Publisher Reports, Remediate, validate and migrate to new OUA.	58 days	Mon 5/10/21	Fri 7/30/21	98SS
106	1.13.4	Design, development and testing of custom ETLs for WEODW functionality	58 days	Mon 5/10/21	Fri 7/30/21	98SS
107	1.13.5	Setup Disaster Recovery (DR) for OUA database	58 days	Mon 5/10/21	Fri 7/30/21	98SS
108	1.13.6	Origin CC&B 2.7 Development - Sprint 1	15 days	Mon 5/10/21	Fri 5/28/21	
109	1.13.6.1	Compile all Java code and resolve any errors	15 days	Mon 5/10/21	Fri 5/28/21	98SS
110	1.13.6.2	Complete Cobol-Java Conversion	15 days	Mon 5/10/21	Fri 5/28/21	98SS
111	1.13.6.3	Complete XAI to IWS Conversion	15 days	Mon 5/10/21	Fri 5/28/21	98SS
112	1.13.6.4	Smoke test business processes that involve Java Code	15 days	Mon 5/10/21	Fri 5/28/21	98SS
113	1.13.6.5	Smoke Test xml schemas by executing all Inbound Web Services and SPLApp objects	15 days	Mon 5/10/21	Fri 5/28/21	98SS
114	1.13.6.6	Execute and test all custom batch and custom real-time interfaces	15 days	Mon 5/10/21	Fri 5/28/21	98SS
115	1.13.6.7	Resolve issues resulting from smoke testing	15 days	Mon 5/10/21	Fri 5/28/21	98SS
116	1.13.6.8	Create a Code Drop to contain upgraded code	15 days	Mon 5/10/21	Fri 5/28/21	98SS
117	1.13.6.9	Smoke test business processes that involve Configuration Tools Objects	15 days	Mon 5/10/21	Fri 5/28/21	98SS
118	1.13.6.10	Smoke Test the database objects (triggers, stored procedures, etc.)	15 days	Mon 5/10/21	Fri 5/28/21	98SS
119	1.13.6.11	Functional Testing of Installed Code Drop on CC&B 2.7 DEV	15 days	Mon 5/10/21	Fri 5/28/21	98SS
120	1.13.6.12	Create Configuration Workbook - finalize and update after design review	15 days	Mon 5/10/21	Fri 5/28/21	98SS
121	1.13.6.13	Conduct Sprint Demo	1 day	Fri 5/28/21	Fri 5/28/21	120FF
122	1.13.7	Origin CC&B 2.7 Development - Sprint 2	14 days	Tue 6/1/21	Fri 6/18/21	

		IRWD Upgrade Schedule				
ID	WBS	Task Name	Duration	Start	Finish	Predecessors
123	1.13.7.1	Compile all Java code and resolve any errors	14 days	Tue 6/1/21	Fri 6/18/21	108
124	1.13.7.2	Complete Cobol-Java Conversion	14 days	Tue 6/1/21	Fri 6/18/21	123SS
125	1.13.7.3	Complete XAI to IWS Conversion	14 days	Tue 6/1/21	Fri 6/18/21	123SS
126	1.13.7.4	Smoke test business processes that involve Java Code	14 days	Tue 6/1/21	Fri 6/18/21	123SS
127	1.13.7.5	Smoke Test xml schemas by executing all Inbound Web Services and SPLApp objects	14 days	Tue 6/1/21	Fri 6/18/21	123SS
128	1.13.7.6	Execute and test all custom batch and custom real-time interfaces	14 days	Tue 6/1/21	Fri 6/18/21	123SS
129	1.13.7.7	Resolve issues resulting from smoke testing	14 days	Tue 6/1/21	Fri 6/18/21	123SS
130	1.13.7.8	Create a Code Drop to contain upgraded code	14 days	Tue 6/1/21	Fri 6/18/21	123SS
131	1.13.7.9	Smoke test business processes that involve Configuration Tools Objects	14 days	Tue 6/1/21	Fri 6/18/21	123SS
132	1.13.7.10	Smoke Test the database objects (triggers, stored procedures, etc.)	14 days	Tue 6/1/21	Fri 6/18/21	123SS
133	1.13.7.11	Functional Testing of Installed Code Drop on CC&B 2.7 DEV	14 days	Tue 6/1/21	Fri 6/18/21	123SS
134	1.13.7.12	Create Configuration Workbook - finalize and update after design review	14 days	Tue 6/1/21	Fri 6/18/21	123SS
135	1.13.7.13	Conduct Sprint Demo	1 day	Fri 6/18/21	Fri 6/18/21	134FF
136	1.13.8	Origin CC&B 2.7 Development - Sprint 3	14 days	Mon 6/21/21	Fri 7/9/21	
137	1.13.8.1	Compile all Java code and resolve any errors	14 days	Mon 6/21/21	Fri 7/9/21	122
138	1.13.8.2	Complete Cobol-Java Conversion	14 days	Mon 6/21/21	Fri 7/9/21	137SS
139	1.13.8.3	Complete XAI to IWS Conversion	14 days	Mon 6/21/21	Fri 7/9/21	137SS
140	1.13.8.4	Smoke test business processes that involve Java Code	14 days	Mon 6/21/21	Fri 7/9/21	137SS

ID	WBS	Task Name	Duration	Start	Finish	Predecessors
		IRWD Upgrade Schedule				
141	1.13.8.5	Smoke Test xml schemas by executing all Inbound Web Services and SPLApp objects	14 days	Mon 6/21/21	Fri 7/9/21	137SS
142	1.13.8.6	Execute and test all custom batch and custom real-time interfaces	14 days	Mon 6/21/21	Fri 7/9/21	137SS
143	1.13.8.7	Resolve issues resulting from smoke testing	14 days	Mon 6/21/21	Fri 7/9/21	137SS
144	1.13.8.8	Create a Code Drop to contain upgraded code	14 days	Mon 6/21/21	Fri 7/9/21	137SS
145	1.13.8.9	Smoke test business processes that involve Configuration Tools Objects	14 days	Mon 6/21/21	Fri 7/9/21	137SS
146	1.13.8.10	Smoke Test the database objects (triggers, stored procedures, etc.)	14 days	Mon 6/21/21	Fri 7/9/21	137SS
147	1.13.8.11	Functional Testing of Installed Code Drop on CC&B 2.7 DEV	14 days	Mon 6/21/21	Fri 7/9/21	137SS
148	1.13.8.12	Create Configuration Workbook - finalize and update after design review	14 days	Mon 6/21/21	Fri 7/9/21	137SS
149	1.13.8.13	Conduct Sprint Demo	1 day	Fri 7/9/21	Fri 7/9/21	148FF
150	1.13.9	Prepare for Testing	14 days	Mon 6/28/21	Fri 7/16/21	
151	1.13.9.1	Prepare System Integration Testing (SIT) Plan	10 days	Mon 6/28/21	Mon 7/12/21	136SS+5 days
152	1.13.9.2	Prepare User Acceptance Testing (UAT) Plan	10 days	Mon 6/28/21	Mon 7/12/21	151SS
153	1.13.9.3	Prepare SIT and UAT Materials	4 days	Tue 7/13/21	Fri 7/16/21	151,152
154	1.13.10	Prepare End-User Training - OUA Only	5 days	Mon 6/28/21	Fri 7/2/21	150SS
155	1.13.10.1	Prepare End-User OUA Training Schedule	5 days	Mon 6/28/21	Fri 7/2/21	
156	1.13.10.2	Prepare End-User OUA Training Materials and CC&B Screen Shots	5 days	Mon 6/28/21	Fri 7/2/21	155SS
157	1.13.11	Deliverable D08 - Configuration Workbooks	0 days	Mon 7/12/21	Mon 7/12/21	108,122,136
158	1.13.12	Deliverable D09 - SIT Plan	0 days	Fri 7/16/21	Fri 7/16/21	150

	IRWD Upgrade Schedule					
ID	WBS	Task Name	Duration	Start	Finish	Predecessors
159	1.13.13	Deliverable D10 - UAT Plan	0 days	Fri 7/16/21	Fri 7/16/21	150
160	1.13.14	Deliverable D11 - Training Plan	0 days	Fri 7/2/21	Fri 7/2/21	154
161	1.13.15	Deliverable D12 - Training Calendar	0 days	Fri 7/2/21	Fri 7/2/21	154
162	1.13.16	MILESTONE M04 - Construct Phase Complete	0 days	Fri 7/16/21	Fri 7/16/21	150
163	1.13.17	Close Construct Phase	0 days	Fri 7/16/21	Fri 7/16/21	150
164	1.14	Confirm (11 Weeks)	44 days	Mon 8/2/21	Fri 10/1/21	
165	1.14.1	Integration Testing	10 days	Mon 8/2/21	Fri 8/13/21	
166	1.14.1.1	Integration Test Execution	10 days	Mon 8/2/21	Fri 8/13/21	56
167	1.14.1.2	Integration Testing Defect Correction	10 days	Mon 8/2/21	Fri 8/13/21	166SS
168	1.14.2	User Acceptance Testing	34 days	Mon 8/16/21	Fri 10/1/21	
169	1.14.2.1	UAT Execution	34 days	Mon 8/16/21	Fri 10/1/21	165
170	1.14.2.2	UAT Defect Correction	34 days	Mon 8/16/21	Fri 10/1/21	169SS
171	1.14.3	Mock Cutovers	16 days	Mon 8/30/21	Tue 9/21/21	
172	1.14.3.1	Mock Cutover 1	14 days	Mon 8/30/21	Fri 9/17/21	165
173	1.14.3.1.1	Prepare for Mock Cutover	3 days	Mon 8/30/21	Wed 9/1/21	169SS+10 days
174	1.14.3.1.2	Conduct Mock Cutover	3 days	Thu 9/2/21	Tue 9/7/21	173
175	1.14.3.1.3	Document Timing and Issues	2 days	Wed 9/8/21	Thu 9/9/21	174
176	1.14.3.1.4	Review Mock 1 Results & Update Cutover Checklist	6 days	Fri 9/10/21	Fri 9/17/21	175
177	1.14.3.2	Mock Cutover 2	10 days	Wed 9/8/21	Tue 9/21/21	

		IRWD Upgrade Schedule				
ID	WBS	Task Name	Duration	Start	Finish	Predecessors
178	1.14.3.2.1	Prepare for Mock Cutover	2 days	Wed 9/8/21	Thu 9/9/21	175SS
179	1.14.3.2.2	Conduct Mock Cutover	3 days	Fri 9/10/21	Tue 9/14/21	178
180	1.14.3.2.3	Document Timing and Issues	2 days	Wed 9/15/21	Thu 9/16/21	179
181	1.14.3.2.4	Review Mock 2 Results and Update Cutover Checklist	3 days	Fri 9/17/21	Tue 9/21/21	180
182	1.14.4	Deliver OUA Training	8 days	Wed 9/22/21	Fri 10/1/21	
183	1.14.4.1	Complete OUA End-User Training Development	3 days	Wed 9/22/21	Fri 9/24/21	181
184	1.14.4.2	Train IRWD's Training Team	3 days	Mon 9/27/21	Wed 9/29/21	183
185	1.14.4.3	Schedule Make-Up Classes	2 days	Thu 9/30/21	Fri 10/1/21	184
186	1.14.5	Deliverable D13 - UAT Results w/Approval	0 days	Fri 10/1/21	Fri 10/1/21	168
187	1.14.6	Deliverable D14 - Cutover Checklist w/Task Durations	0 days	Tue 9/21/21	Tue 9/21/21	181
188	1.14.7	Deliverable D15 - Training Materials	0 days	Fri 10/1/21	Fri 10/1/21	182
189	1.14.8	MILESTONE M05 - Production-Ready Platform	0 days	Fri 10/1/21	Fri 10/1/21	182
190	1.14.9	MILESTONE M06 - Confirm Phase Complete	0 days	Fri 10/1/21	Fri 10/1/21	182
191	1.14.10	Close Confirm Phase	0 days	Fri 10/1/21	Fri 10/1/21	182
192	1.15	Transition & Operate (13 Weeks)	61 days	Mon 10/4/21	Thu 12/30/21	
193	1.15.1	Production Launch	61 days	Mon 10/4/21	Thu 12/30/21	
194	1.15.1.1	Go-Live Code Freeze (CC&B 2.7 & OUA 2.7)	1 day	Mon 10/4/21	Mon 10/4/21	191
195	1.15.1.2	Review Deployment Checklist	1 day	Tue 10/5/21	Tue 10/5/21	194

IRWD Upgrade Schedule						
ID	WBS	Task Name	Duration	Start	Finish	Predecessors
196	1.15.1.3	Conduct Go-live and Deployment Readiness Assessment	2 days	Wed 10/6/21	Thu 10/7/21	195
197	1.15.1.4	Go/No-Go Readiness Report	1 day	Fri 10/8/21	Fri 10/8/21	196
198	1.15.1.5	Conduct Production Deployment (CC&B on 11/6 and OUA on 11/7)	2 days	Fri 10/8/21	Mon 10/11/21	197FS-1 day
199	1.15.1.6	Go-Live Complete	0 days	Mon 10/11/21	Mon 10/11/21	198
200	1.15.1.7	Post Go Live Support	40 days	Mon 10/11/21	Fri 12/03/21	199FS-1 day
201	1.15.2	Project Close-Out	5 days	Mon 11/29/21	Fri 12/03/21	
202	1.15.2.1	Create Project Close-Out and Stabilization Report	5 days	Mon 11/29/21	Fri 12/03/21	200FS-5 days
203	1.15.2.2	Conduct Project Close-Out Meeting	1 day	Fri 12/03/21	Fri 12/03/21	202FF
204	1.15.3	Deliverable D16 - Readiness Assessment	0 days	Fri 10/8/21	Fri 10/8/21	197
205	1.15.4	Deliverable D17 - Project Close-Out & Stabilization Report	0 days	Fri 12/03/21	Fri 12/03/21	201
206	1.15.5	MILESTONE M07 - Stable Production Operations	0 days	Fri 12/03/21	Fri 12/03/21	201
207	1.15.6	MILESTONE M08 - Transition & Operate Phase Complete	0 days	Fri 12/03/21	Fri 12/03/21	201
208	1.15.7	Close Transition & Support Phase	0 days	Fri 12/03/21	Fri 12/03/21	201

6. Schedule

Assurance of the firm's ability to complete all work considering the firm's current and planned workload based on the proposed schedule.

Origin is ready, willing, and able to perform the work as outlined in IRWD's RFP. Origin has the resources to perform the work in the timeline outlined in section 5 above.

7. References

A description of the project team's past record of performance on similar projects for which your firm has provided services. Include a discussion of such factors as control of costs, quality of work and ability to meet schedules. Provide three references for implementation/upgrade projects involving Oracle CC&B and Oracle OUBI/OBIEE. Each reference must include:
   a. Client name and contact information
   b. Project description
   c. Role of key project team members

Origin's onPoint project methodology with our change control and risk management processes ensures that a quality product is delivered on time, within scope, and within budget. Communication is one of the keys to a successful delivery, ensuring that any changes to the original plan are thoroughly reviewed. A solid change control process gives the project team the latitude to make necessary changes while providing transparency to stakeholders of the impacts a change could have to the overall project. In addition to the stringent processes we follow, Origin puts the right people in place to ensure success for this upgrade. We have many talented resources on the Origin team. The referenced projects below don't include all of the team members that we are proposing, due to timing of project start and resource availability across the organization. Rest assured, the team we are proposing is highly qualified, as shown in section 4 and in the attached resumes, to deliver a successful project. The following list of references provides a glimpse of similar upgrades.

Client References (1 of 4)

ENSTAR Natural Gas	Matt Kosht – IT Director	907-334-7630 matt.kosht@enstarnaturalgas.com

ENSTAR is a natural gas utility that upgraded from CC&B v2.4 to v2.7. The initiative was originally intended as a technical upgrade only. However, multiple enhancements were added to take advantage of new functionality. Even with the added scope, the original launch date and budget were achieved.

Account Executive – Kelley Isbrandtsen	Technical Architect – Melgar Olaes
Project Manager – Mechelle Davidson	Solution Architect – Jasmin Joaquin
Designer – Gerard Cinco	Business Analyst – Samuel Gates

Client References (2 of 4)

Artesian Water (AWC)	Ray Kelley – Director of Information Technology	302-453-6984 rkelly@artesianwater.com

Artesian Water is a utility providing water, wastewater, and service line protection services to approximately 85,000 meters. AWC upgraded from CC&B v2.3 to v2.6 in November of 2018. This upgrade encompassed CC&B, MWM, and FWPIP. In addition to the application upgrades, Origin collaborated with AWC to reengineer business processes and optimize the M2C workflow. Origin's PM worked closely with AWC's PM throughout the entire project duration to determine whether the original timeline and budget could accommodate any new scope requests. Some changes were absorbed and lower priority or nice to have changes were inventoried as possible phase II project scope. The Origin team included AWC's team in all phases of project execution to ensure requirements we accurately captured, both groups agreed with solution designs or approaches, and that any deficiencies in a deliverable was resolved immediately.

Account Executive – Corey Labor	Technical Architect – Jayakar Akarapu

Client References (2 of 4)

Project Manager – Dante Magtoto	Solution Architect – MJ Jain
Designer – Diane Lampa	Business Analyst – Jasmin Joaquin

Client References (3 of 4)

Spire Energy	Barbara Armstrong Product Manager	205-365-7840 barbara.armstrong@spireenergy.com

Spire Energy is a gas and utility, serving 1.7 million meters. In 2019, they upgraded from CC&B v2.4 to v2.6. Origin led the environment upgrade, design, and development of a new CC&B to G4 integration, and a new tokenization integration. Origin also implemented its database archiving tool, MonArch. The Origin team worked closely with the Spire team to ensure timeline and budget goals were met, and the Spire team was included in all phases to ensure quality in meeting all the captured requirements. At every step, Origin worked closely with Spire to make sure they agreed on solution designs.

Account Executive – Corey Labor	Technical Architect – Jayakar Akarapu
Project Manager – Beth Maxwell	Solution Architect – Stephen Miranda
Designer – Gerard Cinco	Business Analyst – Kyle Christensen

Client References (4 of 4)

South Jersey Industries	Leonard Brinson, Jr. VP & Chief Information Officer	609-878-9161 lbrinsonjr@sjindustries.com

South Jersey Industries (SJI) is a natural gas utility serving 750,000 meters. In 2019, SJI began an upgrade of CC&B (from v2.4 to v2.6) and Maximo (from v7.5 to v7.6.1.1). The upgrade was completed in 2020. Origin led the effort to align all application versions across the three SJI Utilities companies and move toward business process standardization. The Origin team successfully managed the project scope, cost, and quality by conducting weekly meetings with a large team of stakeholders to monitor the project schedule, the key project tasks status, and the RAID log. Frequent communications and accountability points ensured the success of this upgrade.

Account Executive – Dan Nelson	Technical Architect – Alfred Felipe
Project Manager – Shannon Laney	Solution Architect – MJ Jain
Designer– Erik Esteban	Business Analyst – Kyle Christensen

8. Cost Proposal

Provide a detailed breakdown of labor hours by task and position, including sub-consultants. A listing of billing rates by employee, and a time and materials maximum not- to-exceed project fee, inclusive of all direct and indirect costs associated with the project. In addition, complete the attached Cost Matrix separately for CC&B and OUBI upgrade. (Appendix K and Appendix P).

The services and scope outlined in this proposal are provided on a time and materials ("T&M") not to exceed basis. IRWD shall pay Origin for all the time spent performing such service as well as any travel expenses.

Detailed Breakdown of Tasks and Costs		
Task	Hours	Cost
CC&B Upgrade Tasks **(BAFO updated Cost from Appendix K)**	**5,223**	**$895,440**
CC&B Upgrade Tasks (Original Cost)		**$1,041,690**
Task 1: Technical Upgrade of CC&B Application	1,861	$340,980
Task 2: Remediate and Test Customizations, Interfaces, and Batches	2,199	$358,520
Task 3: Training	108	$18,980
Task 4: Post-Production Support	645	$94,370
Task 5: Setup Oracle CC&B Disaster Recovery (DR) on Cloud	378	$76,940
Task 6: Setup ETL Batches in CC&B for Oracle Utilities Analytics (OUA)	32	$5,650
OUA Upgrade Tasks **(BAFO updated Cost from Appendix P)**	**2,082**	**$364,870**
OUA Upgrade Tasks (Original Cost)		**$392,870**
Task 1: Install Oracle Utilities Analytics	694	$121,575
Task 2: Configure and Validate Oracle Standard Out of the Box Reports and Migrate Customized OUBI Reports to OUA	514	$90,025
Task 3: Remediate, Validate, and Migrate BI Publisher (BIP) Reports from OUBI to OUA	273	$47,890
Task 4: Customize and Extend Data-warehouse, ETL, and OBIEE Metadata – WEODW	186	$32,650

Detailed Breakdown of Tasks and Costs		
Task	**Hours**	**Cost**
Task 5: Training	86	$15,080
Task 6: Post-production Support	219	$38,350
Task 7: Setup Oracle OUBI Disaster Recovery (DR) on Cloud	110	$19,300
Task Total	**7,305**	**$1,260,310**
Travel (34 Trips)	**$1,800/trip**	**$63,000**
Discount		**$138,000**
Original – ENGAGEMENT TOTAL		**$1,373,960**
BAFO – FINAL ENGAGEMENT TOTAL		**$1,185,310**

Rate Card	
Role	Rate / Hour
Project Manager	$180
Solution Architect	$180
Technical Architect	$225
CC&B Functional Architect	$175
Lead Trainer	$175
Analytics Architect	$175
OUA / ETL / Report Developer	$175
Designer	$90
Developer	$90

9. Joint Venture

Origin is not proposing any joint ventures or subcontractor use for this upgrade.

10. Conflict of Interest

Origin does not have any known conflicts of interest.

11. Insurance

Origin affirms our compliance with the insurance requirements laid out by the District, which are indicated as follows:

IRWD requires professional liability coverage to be a minimum of $1,000,000, general liability and property damage to be a minimum of $1,000,000. Any additional premium that is required by the insurance carrier for such coverage shall be included in your proposed fee. IRWD does not pay a separate insurance surcharge for the required coverage.

Appendices

Appendix K – BAFO Cost Matrix – CC&B Upgrade

As part of this BAFO, Origin will upgrade following items not listed in the IRWD RFP:

Integrations between IRWD CCB and Paymentus:

1. Real Time Integration – Customer Information
2. Real Time Integration – Payments
3. E-Bill Enrollment/De-enrollment File (Opt – In File)
4. Payment Reconciliation File

CC&B Upgrade – Cost Matrix				
Task	Classification (e.g. Project Manager, Technical Architect, etc.)	Estimated Hours by Classification	Cost by Classification	Total Cost by Task
Task 1: Technical Upgrade of CCB Application	Project Manager	263	$47,340	$340,980
	Technical Arch.	756	$170,100	
	Solution Arch.	253	$45,540	
	Functional Arch.	294	$51,450	
	Developer	295	$26,550	
Task 2: Remediate and Test Customizations, Interfaces, and Batches	Project Manager	285	$51,300	$358,520
	Technical Arch.	484	$108,900	
	Solution Arch.	443	$79,740	
	Functional Arch.	350	$61,250	
	Developer	637	$57,330	
Task 3: Training	Project Manager	16	$2,880	$18,980
	Training Lead	92	$16,100	
Task 4: Post-Production Support	Project Manager	75	$13,500	$94,370
	Technical Arch.	24	$5,400	
	Solution Arch.	149	$26,820	

CC&B Upgrade – Cost Matrix				
Task	**Classification (e.g. Project Manager, Technical Architect, etc.)**	**Estimated Hours by Classification**	**Cost by Classification**	**Total Cost by Task**
	Functional Arch.	152	$26,600	
	Developer	245	$22,050	
Task 5: Setup Oracle CCB Disaster Recovery (DR) on Cloud	Project Manager	118	$21,240	$76,940
	Technical Arch.	200	$45,000	
	Solution Arch.	40	$7,200	
	Functional Arch.	20	$3,500	
Task 6: Setup ETL Batches in CCB for Oracle Utilities Analytics (OUA)	Project Manager	10	$1,800	$5,650
	Analytics Arch.	22	$3,850	

Appendix P – BAFO Cost Matrix – OUBI Upgrade

OUBI to OUA Upgrade – Cost Matrix				
Task	Classification (e.g. Project Manager, Technical Architect, etc.)	Estimated Hours by Classification	Cost by Classification	Total Cost by Task
Task 1: Install Oracle Utilities Analytics	Project Manager	25	$4,500	$121,575
	Analytics Arch.	360	$63,000	
	Analytics Developer	309	$54,075	
Task 2: Configure and Validate Oracle Standard Out of the Box Reports and Migrate Customized OUBI Reports to OUA	Project Manager	15	$2,700	$90,025
	Analytics Arch.	240	$42,000	
	Analytics Developer	259	$45,325	
Task 3: Remediate, Validate, and Migrate BI Publisher (BIP) Reports from OUBI to OUA	Project Manager	23	$4,140	$47,890
	Analytics Arch.	120	$21,000	
	Analytics Developer	130	$22,750	
Task 4: Customize and Extend Data-warehouse, ETL, and OBIEE Metadata – WEODW	Project Manager	20	$3,600	$32,650
	Analytics Arch.	80	$14,000	
	Analytics Developer	86	$15,050	
Task 5: Training	Project Manager	6	$1,080	$15,080
	Analytics Developer	80	$14,000	
Task 6: Post-production Support	Project Manager	5	$900	$38,350
	Analytics Arch.	78	$13,650	
	Analytics Developer	136	$23,800	
Task 7: Setup Oracle OUBI Disaster Recovery (DR) on Cloud	Project Manager	10	$1,800	$19,300
	Analytics Arch.	100	$17,500	

Resumes

Corey Labor - *Vice President / Executive Sponsor*

SPECIALIZATION

Corey has over 21 years of experience providing leadership for teams and enterprise projects. He has spent the last 17 years specifically dedicated to the utility industry providing leadership for the execution of complex Meter-to-Cash (M2C) system implementation projects. These projects have encompassed solutions such as Customer Information System (CIS) Utility Billing, Meter Data Management (MDM), Mobile Workforce Management (MWM), Customer Self Service (CSS), and Operational Device Management (ODM), as well as other utility solutions. Corey has successfully led many strategic projects that have allowed clients to take advantage of advanced technology offerings, automation of business processes and an overall improved customer experience and lower total cost of ownership.

ACCOMPLISHMENTS

Corey has demonstrated his leadership capabilities through the successful delivery of multiple full lifecycle implementations, upgrades, and IT projects. When he initially started in the Utility CIS space, he was a functional lead, which allowed Corey to develop a solid understanding of the utility meter to cash processes and the supporting technology. As Corey progressed his career, he moved into a project management role where he leveraged his functional lead experience to effectively manage large complex utility billing Customer Information System (CIS) implementations. During his time as a Project Manager, Corey helped shape CIS implementation methodologies and develop project tools / accelerators to help clients navigate through the transformation process efficiently.

PROFESSIONAL EXPERIENCE

Origin Consulting | Vice President

- Leads assigned group in delivering required services to meet client expectations for each engagement.
- Demonstrates in-depth understanding of the client industry in order to appropriately provide guidance to clients and to develop opportunities to address client needs through incremental professional service engagements.
- Takes ultimate responsibility for the delivery of service offerings to clients, ensuring engagements are completed on-time, to standard, within budget, and results in a high levels of client satisfaction.
- Manages multiple project delivery teams in the execution of defined methodologies to meet engagement requirements and expectations.

Spire Energy | Executive Oversight

Project Overview: Upgrade of CIS Utility Billing solution

- Technical upgrade as well as replacement of Multi-Purpose Listener (MPL) and design of new Field Activity (FA) process leveraging Oracle Service Bus (OSB).
- Responsible for implementing a project governance model.
- Continual oversight of project performance from a scope, timeline, and budget perspective.

- Worked with the project management team to review risk and implement mitigation strategies.
- Responsible for ensuring quality delivery of the contracted scope of services.

Artesian Water Company | Executive Oversight

Project Overview: Upgrade of CIS Utility Billing and MWM

- Upgrade of utility and MWM plus XAI and Cobol remediation and Service Oriented Architecture (SOA) / integration upgrade.
- Worked closely with Origin PM to provide overall internal project oversight to ensure delivery of a quality scope.
- Responsible for monthly client executive steering committee project status delivery.
- Performed bi-weekly internal audits to ensure project performance.
- Participated in weekly project status meetings.

Green Mountain Power | Project Director

Project Overview: Technical upgrade – CIS Utility Billing and Mobile Work Management

- Responsible for the development of the project management plan.
- Created detailed project plan and managed to the approved plan.
- Identified project requirements and assigned tasks to team members.
- Provided project leadership for a team of functional and technical resources both onshore and offshore.
- Managed project timeline, scope, and budget.
- Provide weekly project status reports that outline project performance, key risks and issues and associated mitigation plans.

Middlesex Water Company | Project Director

Project Overview: Upgrade of MWM and Integration Architecture

- Upgrade plus design, development, and implementation of customized screens.
- Responsible for all aspects of project management.
- Developed and delivered monthly executive steering committee report.
- Led a team of functional and technical resources.
- Provide weekly project status reports that outline project performance, key risks and issues and associated mitigation plans.

Green Mountain Power | Project Director

Project Overview: Migration/Implementation of CIS Utility Billing and MDM

- Provided project management expertise as part of a larger PMO team.
- Coordinated with other vendor project managers to ensure project performance.
- Responsible for the creation of the overall project timeline / plan.
- Managed a team of technical resources responsible for system integration as well as third-party integration.

Mechelle Davidson – *Project Manager*

SPECIALIZATION

Mechelle Davidson has more than 20 years of experience in the utility space, specifically within the gas and electric industries. She has worked with both regulated and deregulated markets in several states throughout the United States. Mechelle is skilled in leading projects in both waterfall and agile methodologies. She is a Project Management Professional (PMP), a Certified Scrum Master (CSM), a Certified Six Sigma Black Belt (CSSBB), and a Certified Scrum Product Owner (CSPO). Mechelle has worked on several Customer Information System (CIS) platforms, including Oracle Utilities Customer Care & Billing (CC&B), SAP for Utilities, Banner, ABP3000, and Peace Energy, among others. In addition to her project management expertise, Mechelle advises clients on process improvement using Lean tools and techniques. Partnering with clients, Mechelle facilitates workshops aimed at improving the customer experience and refining internal processes.

ACCOMPLISHMENTS

Mechelle has led several initiatives in which new CIS platforms were being implemented as well as new operations departments were being formed. She has performed tasks at all stages of the software development life cycle, including Ideation: helping clients understand what they are trying to accomplish, Requirements Elicitation: defining requirements in such a way that everyone agrees and understands the features to be built, Testing and Coordinating Efforts, then documenting results, Training Development / Delivery: ensuring teams are ready to support any new functionality, Change Management: guiding all levels of the organization through new processes or protocols, and Deployment, collaborating with all project team members for production support. Mechelle has also guided clients through short-term and long-range planning activities to help them meet their goals and objectives.

PROFESSIONAL EXPERIENCE

City of Myrtle Beach | Project Manager

Project Overview: Implementation of utility billing solution.

·   Worked as a project manager for the billing component of a large program in which the City is completely updating its systems.

ENSTAR Natural Gas | Project Manager

Project Overview: CC&B 2.7 Upgrade

·   Managed technical and operational aspects of the upgrade.
·   Coordinated new features and functionality to enhance the customer experience.

ENSTAR Natural Gas | Project Manager

Project Overview: MWM 2.3 Upgrade

·   Managed technical and operational aspects of the upgrade.
·   Coordinated testing and deployment activities between ENSTAR, Origin, and the Origin Technology Center.

ENSTAR Natural Gas | Project Manager

Project Overview: Smart Customer Mobile (SCM) Implementation

·   Acted as a liaison between ENSTAR, SCM provider, and Smart Energy Water (SEW).
·   Coordinated activities between the SEW development team and the Origin development team.
·   Ensured proper documentation was captured and stored in ENSTAR's document repository.

ENSTAR Natural Gas | Project Manager

Project Overview: Database Upgrade

·   Partnered with the third-party development team to accomplish tasks.
·   Coordinated both internal testing and user-acceptance testing for the new functionality.

TXU Energy | Scrum Master

Project Overview: Scrum Master for Data & Analytics and Enterprise Data Management Teams

·   Partnered with product owners to capture user stories and prioritize work.
·   Facilitated all team ceremonies.
·   Acted as an escalation point for issues or risks that were not being resolved.
·   Reported findings to TXU Energy leadership.
·   Led "big room planning" sessions to identify short- and long-term goals.

TXU Energy | Scrum Master

Project Overview: Scrum Master for Commodity and Non-Commodity Products Team

·   Created and maintained product roadmap, with a 12-month view of product launches.
·   Worked with TXU Energy leadership to coordinate resources.
·   Facilitated all team ceremonies.
·   Managed weekly cross-functionality meetings to align all teams on product launch activities.

TXU Energy | Business Project Manager

Project Overview: Chaired the professional development committee within Performance Excellence, working with managers to develop and deliver training focused on project management, and business analyst activities

·   Managed projects using the waterfall methodology for the following programs and projects.
·   Cash Back Program – TXU Energy's annual cash-back initiative, totaling over $45,000,000 in customer payouts.
·   High Bill Program – working with TXU leadership to identify and addressed the biggest issues with summer and winter high bill season.
·   Customer Communication Program – completely revamped the communications that are sent to customers and changed the way they are created, delivered, and stored.
·   SAP Implementation Program – implementation of new customer information and billing system, as well as establishing 3 new call centers.

Melgar Olaes – *Technical Architect Lead*

SPECIALIZATION

Melgar is an Information Technology (IT) professional with 20+ years of experience in various project implementations such as Customer Information Systems and Enterprise Management Systems. He started his career as a Solaris System Administrator, and later worked as an Application Administrator for Enterprise Management Systems as well as a Technical Architect for the Oracle Utilities Product Suite. Melgar is an experienced and skilled technical architect for the Oracle Utilities Product Suite with a focus on Customer Care & Billing (CC&B) and Oracle Utilities Meter Data Management (MDM). He is very knowledgeable with Mobile Workforce Management (MWM), Customer Self Service (CSS), and Customer to Meter (C2M) as a Technical Architect. He is also familiar with Fusion Middleware software products which include WebLogic Server and SOA Suite. Aside from Oracle Utilities applications, Melgar is also proficient with Unix and Linux platform System Administration and is knowledgeable with Microsoft products including desktop applications and Windows Servers.

ACCOMPLISHMENTS

Melgar has been part of several project implementations from development to deployment to the customer sites. He has also worked on several version upgrades for several applications of Oracle Utilities Product Suite. Melgar has helped developers by providing them with the development environments, assistance, and support until customer requirements are successfully delivered. Melgar also provided support to clients by helping them with patch installations, customer modifications deployment, troubleshooting, and root-cause analysis whenever necessary. Melgar also holds certification for CompTIA A+, ITIL 4 Foundation CPD, Oracle Cloud Infrastructure Foundation 2020 Associate, Oracle Cloud Infrastructure 2019 Certified Architect Associate, Oracle Cloud Infrastructure 2019 Certified Architect Professional, Oracle Cloud Infrastructure 2019 Cloud Operations Certified Associate, and Oracle Autonomous Database Cloud 2019 Certified Specialist.

PROFESSIONAL EXPERIENCE

ENSTAR Natural Gas | Technical Architect

Project Overview: CC&B v2.7.0.3.0 upgrade

- Setup CC&B v2.7.0.3.0 test, training, and production environments to be used by the offshore team.
- Upgraded client's CC&B application and database to CC&B v2.7.0.3.0.
- Provided technical assistance to the development team for code migration.
- Installed CC&B Roll-Up Patches from Oracle.
- Installed Single-Fix to CC&B environments.
- Applied Oracle Critical Patch Updates to all CC&B environments.
- Provided maintenance service to client's environments.
- Provided technical assistance to the development team.
- Provided technical support to clients for environment-related technical issues.

City of Tempe | Technical Architect

Project Overview: CC&B v2.7.0.3.0 upgrade

- Setup CC&B v2.7.0.3.0 test and pre-production environments to be used by the offshore team.
- Upgraded client's CC&B application and database to CC&B v2.7.0.3.0.

- Provided technical assistance to the development team for code migration.
- Installed CC&B Roll-Up Patches from Oracle.
- Installed Single-Fix to CC&B environments.
- Provided maintenance service to client's environments.
- Provided technical assistance to the development team.
- Provided technical support to clients for environment-related technical issues.

Synersys Consulting Inc. | Technical Architect / IT Manager

Project Overview: Technical Resource / Technical Architect

- Acted as the decision-maker for all IT related concerns.
- Evaluated and recommended IT software and hardware to support internal and external requirements.
- Managed servers and IT infrastructures of the organization.
- Built environments for the development team that accommodated the client's requirements.
- Prepared and installed bug fixes and service packs for Oracle Utilities Product Suites.
- Provided technical support to the development team.

Keppel Electric | Technical Architect

Project Overview: Maintenance and Support for CC&B and MDM

- Provided maintenance and support for environment operations development, User Acceptance Testing (UAT), System Integration Testing (SIT), and production including refreshes and scheduled maintenance.
- Provided technical support and assistance to the development and functional team for custom modification testing and deployment.
- Collaborated with internal and external teams (Backup, Infrastructure, Middleware System, and Database) regularly for the smooth operation of Oracle Utilities Products.

Aboitiz Power | Technical Architect

Project Overview: Upgrade of CC&B and Implementation of MDM

- Managed environment backups and upgrades for CC&B.
- Provided technical assistance to the development team for code migration.
- Installed and configured Oracle Utilities MDM.
- Assisted in setting up Oracle Utilities CC&B and Oracle Utilities MDM integration.
- Provided recommendations in environment creations for development, pre-production, and production environments.
- Provided maintenance service to client's environments.

EDF Energy | Technical Architect

Project Overview: Maintenance and Support for CC&B and MDM

- Acted as the primary resource person during the start of the environment build.
- Provided recommendations and suggestions in the environment build for development and non-development environments.
- Involved in process creation for environment builds.

- Acted as a resource person in translating Oracle Utilities tools to the client's internal tool / application.
- Provided support for testers and developers.
- Performed constant coordination with onshore counterparts to maintain process alignment.
- Conducted training for the new Technical Architects of the client.

Baltimore Gas and Electric | Technical Architect

Project Overview: Maintenance and Support for CC&B

- Responsible for making sure that customer requirements and custom modification requests were packaged completely and applied successfully to the desired environments.
- Provided technical support to testers and developers.
- Provided continuous coordination with onshore counterparts to maintain the process alignment.

Oracle Philippines| Manager / Release Services

Project Overview: Technical Resource / Technical Support

- Built and maintained the software build processes of the Oracle Utilities Product Suites.
- Provided technical assistance to the Product Development, Quality Assurance, and Customer Support that included all stages in the product lifecycle from development to the successful installation and operation of the product at the customer sites.
- Built environments that were used by different teams in the product development lifecycle.
- Ensured all environment's availability and reliability with minimal downtime.
- Conducted regular monitoring of system resources for all applications and environments.
- Prepared and installed bug fixes, services packs, and version release for the Oracle Utilities Product Suites.
- Provided technical support to Quality Assurance and Development Teams.

Alfred Felipe – *Technical Architect*

SPECIALIZATION

Alfred has over nine years of experience delivering customer implementation solutions for Oracle Utilities applications such as Customer Care and Billing (CC&B), Meter Data Management (MDM), Mobile Workforce Management (MWM), Customer Self-Service (CSS), and Customer to Meter (C2M) as a Technical Architect. He has expertise with product integration such as CC&B to MDM and CC&B to CSS and possesses strong technical skills in a variety of system architectures. He is proficient in Oracle Utilities Application Framework (OUAF) environment and infrastructure management, installation, re-configuration, product upgrade, fine-tuning, and backup and recovery.

ACCOMPLISHMENTS

Alfred has worked with a large number of projects as a Technical Architect, making sure that tasks and requirements are completed successfully, on time, and within budget. Because of his "can-do" attitude and excellent troubleshooting skills, he was able to resolve minor to major issues found in different Oracle Utilities Implementations. He also has expertise with several cloud services such as ServerPoint, Amazon Web Services (AWS) and Oracle Cloud, which can be used to further simplify the process of standing up a server as well as maximize the full potential of OUAF. He has not only broadened his experience but also strengthened his skillset with every challenge he has faced.

PROFESSIONAL EXPERIENCE

Artesian Water Company | Technical Architect

Project Overview: Implementation of CC&B v2.6.0 and MWM v2.3.0

· Setup native CC&B v2.6.0 and MWM v2.3.0 development, testing, and staging environments. Installed service pack upgrades and patch updates. Setup AWS (EC2) environments using T2.Large as instance type.
· Performed code drop installation and performance tuning. Resolved development and environment technical issues.
· Responsible for environment defect remediation during go-live.

South Jersey Industries | Technical Architect

Project Overview: Implementation of CC&B v2.6.0.1 and MWM v2.3.0

· Setup MWM v2.3.0 development and staging environments on AWS.
· Remediated environment technical issues such as failing to start up, hybrid mobile not deploying, and some compilation issues.
· Perform Oracle patches and custom code drop deployments on MWM DEV and TST environments.
· Setup CCB v2.6.0.1 environment on Citrix VDI instances for development purposes.

Spire Energy | Technical Architect

Project Overview: Implementation of &B v2.4.0 & v2.6.0.1

- Setup embedded CC&B v2.4.0 & native CC&B v2.6.0.1 development and staging environments on AWS. Installed service pack and patch updates to ensure the environments were up to date. Provide infrastructure remediation
- Performed code drop installation and resolved environment technical issues such as failing to start up and code not reflecting updates.
- Author environment build, change management, and issue remediation documentation.

Golden State Water Company | Technical Architect

Project Overview: Implementation of CC&B v2.4.0 and MWM v2.3.0

- Setup embedded CC&B v2.4.0 and MWM v2.3.0 development and staging environments. Installed service pack and patch updates to ensure the environment is up to date.
- Diagnose and remediate environment technical issues such as environment failing to startup correctly due to missing configurations.

Modesto Irrigation District | Technical Architect

Project Overview: Implementation of CC&B v2.5.0 and MDM v2.1.0

- Setup embedded CC&B v2.5.0 and MDM v2.1.0 development and staging environments. Installed service pack and patch updates to ensure the environments were up to date.
- Diagnosed and resolved environment technical issues such as environment failing to startup.
- Setup Linux Servers and install 3rd party applications for Smart OPS Proof of concept.

Miami Dade County | Technical Architect

Project Overview: Implementation of CC&B v2.4.0 and MWM v2.2.0

- Deployed embedded CC&B v2.4.0 and MWM v2.2.0 development and staging environment. Installed service pack and patch updates to ensure the environment were up to date.
- Diagnosed and remediated TLS issues found on the v1.2 for use with client's CCB environment.

Orlando Utilities Commission | Technical Architect

Project Overview: Implementation of CC&B v2.5.0 and MDM v2.1.0

- Setup embedded CC&B v2.5.0 and MDM v2.1.0 development and staging environments. Installed patch update.
- Diagnosed and resolved environment technical issues such as environment failing to startup.

Middlesex Water Company | Technical Architect

Project Overview: Implementation of CC&B v2.5.0 and MWM v2.3.0

- Setup embedded CC&B v2.5.0 and MWM v2.3.0 development and staging environments. Performed code drop installation on development, testing, and production environments. Installed service pack upgrades and patch installs.
- Diagnosed and remediated issues with the hybrid mobile app, which became stuck after logging in. Resolved configuration issues that make the environment fail to startup due to an error in the database configuration.

Madhur Jain – *Solution Architect*

SPECIALIZATION

Madhur Jain has over twelve years of Customer Information System (CIS) Software Development Life cycle (SDLC) experience in the gas, electric, and water industries. He has extensive full life cycle implementation and upgrades experience following both Waterfall and Agile methodologies for both cloud and premise. Madhur has led multiple Oracle Utilities Customer Care and Billing (CC&B) Implementations in multiple leadership roles such as Solution Architect and Functional Lead Architect. He continues to lead IT Projects delivering Oracle Utilities CC&B, Meter Data Management (MDM), Mobile Workforce Management (MWM), Oracle Utilities Customer Self Service (OUCSS), Oracle Utility Analytics (OUA), Service Oriented Architecture (SOA), and Oracle Fusion Middleware for both productized integrations like Field Work Process Integration Pack (FWPIP) and custom productized interfaces between Oracle systems and non-Oracle systems like Salesforce and Maximo, to name a few.

ACCOMPLISHMENTS

Madhur is a certified Scrum Master and the product owner for Origin Customer Experience (OCX), Origin's Software as a Service (SaaS) Customer web self-service portal who has demonstrated his leadership capabilities through the successful delivery of multiple full life cycle implementations, upgrades, and IT projects. Early in his career, he was responsible for configuration, functional design, and complex issues resolution and triage. Understanding CIS business processes and technology has given him an advantage when leading delivery projects. He has helped shape CIS implementation methodologies and develop project documentation templates/accelerators to help clients through the transformation process.

PROFESSIONAL EXPERIENCE

South Jersey Industries | Solution Architect

Project Overview: Upgrade of CC&B 2.4 to 2.6.0.1 and upgrade of Maximo from 7.5.10 to 7.6.1

· Worked directly with the client's core project team for the full upgrade cycle.
· Worked with over 2 dozen edge applications to upgrade the associated interfaces.
· Lead the Origin team and worked with the client and other vendor teams successfully.

Modesto Irrigation District | Solution Architect

Project Overview: Implementation of Oracle Utilities CC&B 2.5, MDM 2.1, CSS 2.1, and Origin's MobileLite and SmartAct

· Worked directly with the client's core project team for the full implementation cycle.
· Responsible for holding analysis workshops with the client, addressing requirements, and creating high-level solution blueprints.
· Responsible for converting solution blueprints into designs for the developers.
· Responsible for configuring, customizing, and bringing clients up to speed with CC&B and getting them comfortable with it.
· Responsible for leading defect triage sessions as the project progresses into the testing phase.

Artesian Water | Functional Lead

Project Overview: Upgrade of CC&B 2.3 to 2.6, upgrade of MWM 2.1 to 2.3, FWPIP upgrade to 12C.

Responsible for a CC&B/FWPIP/APGL upgrade project as part of a bigger project including an MWM upgrade.

· Responsible for holding discovery/analysis workshops with the client, created user stories, addressing requirements, and creating high-level solution blueprints.
· Responsible for helping the client's IT and Business teams to work together through the entire SDLC.

South Jersey Industries | Integration Architect

Project Overview: Migrating recently acquired companies into SJI's environment.

· Part of the Agile team participated in sprint planning, review, and retrospect.
· Responsible for integrating MWM with the clients' existing CC&B and Maximo systems.
· Responsible for creating new interfaces to support additional functionality brought over with the acquisition.

Orlando Utilities Commission | Functional Lead

Project Overview: Implementation of Oracle Utilities CC&B and MDM

· Responsible for the MDM Implementation for the client as part of a bigger project including multiple OU edge apps.
· Responsible for holding JAD sessions with the clients: addressing their requirements and creating high-level solution blueprints.

Duquesne Light Company | Integration Architect

Project Overview: Implementation of Oracle Utilities CC&B, MWM, WAM, MDM, FWPIP, and DI

· Responsible for all integration including both FW PIP integration (which integrates CC&B, MWM, and WAM) and Direct Integration between CC&B and MDM.
· Responsible for implementing, maintaining, and troubleshooting integration products and customizing a solution to the client's specific needs through the configuration of edge apps along with Oracle middleware.
· Added and maintained custom data value maps to contain client-specific data and certain enhancements where the base products could not be customized to meet customer-specific needs.
· Involved in designing solutions for other development teams and developing / customizing BPEL composites to meet customer requirements.
· Provided time/resource estimates for design and development did onsite and offshore. In-depth experience working with XML, XSL and XSD transformations, J2EE, SQL Developer, BPEL on a Linux platform running Weblogic.
· Actively involved in code reviews, pre-release testing and creating specific maintenance documents which enabled the client to easily manage the integration.

Green Mountain Power | Integration Architect

Project Overview: Upgrading Oracle Utilities CC&B, MWM, MDM, and FWPIP

· Responsible for all Oracle productized integration including FW PIP and Direct Integration between CC&B and MDM.

ENSTAR Natural Gas | Integration Architect

Project Overview: Upgrading Oracle Utilities CC&B, MWM, and FWPIP

· Responsible for supporting FW PIP, base product, and customizations as per customer needs. Designing and developing custom interfaces for CC&B and MWM to connect to third-party systems not supported by Oracle out of the box.

Diane Lampa – *Designer / Developer*

SPECIALIZATION

Diane is an IT consultant with over 14 years of experience working on customizations to Oracle Utilities applications, with an emphasis on Oracle Utilities Customer Care and Billing (CC&B). She has participated in various phases of the implementation process including design, development, testing, and support. Diane is an experienced team player with excellent technical, analytical, communication, and interpersonal skills.

ACCOMPLISHMENTS

Diane has played multiple roles on various projects, gaining proficiency in both the functional and technical aspects of the Oracle Utilities Application Framework (OUAF). She has shown leadership by managing her work and helping coordinate task assignments for the offshore development team. Diane has worked extensively with various versions of CC&B but is also experienced with technologies such as Oracle BI Publisher, Meter Data Management (MDM), and Mobile Workforce Management (MWM).

PROFESSIONAL EXPERIENCE

City of Tempe | Designer / Developer

Project Overview: Enhancements for CC&B 2.3 and Oracle CC&B 2.3 to CC&B 2.7 SP 3 upgrade with scope including Cobol to Java / Config Tools / Groovy Conversion, XAI Services to Integrated Web Services (IWS)

· Coordinated work assignments for the offshore development team.
· Collaborated with the onshore team and made recommendations for tactical and strategic solutions.
· Key participant in defect triage and resolution of the enhancements developed for CC&B 2.3.
· Key participants in the design and development of modules converted from COBOL to either Java, Config Tools, or Groovy.
· Tested customizations for higher version compatibility, identified issues, and recommended solutions.
· Designed custom CC&B modules for CC&B 2.7 including enhancements for creating device tests via batch.

Spire | Designer

Project Overview: CC&B 2.6 Upgrade and real-time ViryaNet G4 Work Order Integration

· Coordinated work assignments for the offshore development team.
· Collaborated with the onshore team and made recommendations for tactical and strategic solutions.
· Reviewed code and unit test plans.
· Key member of the team that handled investigation and defect resolutions during the 2.6 implementation.
· Coordinated delivery releases.

Artesian Water Company | Designer / Developer

Project Overview: CC&B 2.3 to CC&B 2.6 and MWM 2.1 to 2.3 SP 2 upgrade with scope including Cobol to Java Conversion, XAI Services to IWS, UC4 Integration, New Rate Engine Conversion, and full transition to Hybrid Mobile Communication Platform (MCP)

- Collaborated with an onshore team and made recommendations for tactical and strategic solutions.
- Coordinated work assignments for the offshore development team.
- Key participant in the design and development of modules converted from COBOL to Java.
- Tested customizations for higher version compatibility, identified issues, and recommended solutions.
- Designed custom CC&B modules including enhancements to rate check portal and online bill display.
- Successfully migrated configuration data between environments through the OUAF CMA tool.
- Led an offshore team in defect triage and resolution.
- Provided production support during and after project go-live.

Modesto Irrigation District | Designer / Developer

Project Overview: Implementation of CC&B 2.5, MDM 2.1, Customer Self-Service (CSS) 2.1, BI Publisher and Origin's MobileLite

- Coordinated work assignments for the offshore development team.
- Designed and developed custom reports via BI Publisher and PL / SQL including reports on cashier totals, franchise fees as well as returned payments.
- Conducted BI Publisher training with the client resources on creating custom reports.
- Key participant in defect triage and resolution.
- Prepared and coordinated delivery releases across multiple products.
- Provided production support during and after project go-live.

Miami-Dade County | Developer

Project Overview: MWM Upgrade

- Designed and developed custom CC&B algorithms for subsystems including credit and collections.

Golden State Water Company | Developer

Project Overview: Enhancements and production support for CC&B

- Defect triage and resolution.

Green Mountain Power | Developer

Project Overview: Enhancements and production support for CC&B

- Developed custom CC&B algorithms for various subsystems including billing.
- Ensured quality of deliverables by performing code reviews.
- Helped with the investigation and resolution of defects.

City of Jackson | Designer / Developer

Project Overview: Enhancements and production support for CC&B V2.4 and BI Publisher

- Designed and developed custom CC&B algorithms and batches for various subsystems including credit and collections, meter reads, and letters.
- Designed and developed custom reports via BI Publisher and PL / SQL including reports on consumer deposits, consumer refunds, and payment backouts.
- Key participant in the investigation and resolution of production defects.
- Coordinated delivery releases.

Southern Maryland Electric Cooperative | Developer

Project Overview: Enhancements and production support for CC&B

- Defect triage and resolution.
- Reviewed code and unit test plans.

ENSTAR Natural Gas | Developer

Project Overview: MWM Upgrade

- Developed custom CC&B modules that enhance the CC&B-MWM integration per the business requirements.

Colorado Springs Utilities | Designer / Developer

Project Overview: Enhancements and production support for CC&B

- Developed custom CC&B modules, including custom algorithms to interface CC&B field activities to the Clevest MWM application.
- Developed customization on the e-Bill enhancement module implemented in PL / SQL.
- Defect triage and resolution.
- Ensured quality of releases by performing code reviews.

Seraya Energy | Analyst Programmer

Project Overview: CC&B Implementation

- Senior member of the in-house support team for CC&B Implementation.
- Responsible for gathering business requirements and developing custom modules for CC&B V1.5.15.
- Packaged customized modules for release to the production environment.
- Defect triage and resolution.

Pacific Gas and Electric | Developer

Project Overview: CC&B Implementation

- Assigned on-site, working directly with the client to define business processes and needs.
- Participated in full-scale testing of delivered custom modules for CC&B V1.5.
- Developed custom modules for various subsystems including customer information, billing, interval billing, adjustments, credit and collections, field activity, and letters.
- Tested customizations for version compatibility, identified issues, and implemented solutions.

Joshua "Ace" Vitug – *Developer*

SPECIALIZATION

Ace is a software developer with more than 5 years of experience creating source code components, unit testing, and providing client support for the Oracle Utilities Applications Framework (OUAF) under the prescribed Software Development Life Cycle (SDLC). He has created custom components for Customer Care & Billing (CC&B) using Java, COBOL, and the Oracle Service Bus (OSB).

ACCOMPLISHMENTS

Ace has been a key part of the development team responsible for the successful implementation of several Customer Information System (CIS) replacements and CIS upgrade projects, from initiation to completion. He has successfully created source codes during the development phase that met functional requirements and supported the solution during the maintenance phase of the project.

PROFESSIONAL EXPERIENCE

SpireOne | Developer

Project Overview: Oracle Utilities CC&B 2.6 Custom Code Implementation

- Developed defect fixes for the business Credit Refund Algorithm to transfer customer's balance following specific business rules before issuing a refund for the customer.
- Developed algorithms that facilitated special requirements for bankrupt customer cases.
- Developed enhancements for existing custom modules that adhere to the new requirements defined by the client.

South Jersey Industries | Developer

Project Overview: Oracle Utilities CC&B 2.6 Performance Testing

- Tested various functionalities in CC&B to ensure each module was able to complete their designated task within an acceptable timeframe.

City of Tempe | Developer

Project Overview: Oracle Utilities CC&B 2.7 Custom Code Implementations

- Created a custom algorithm and batch to select eligible devices / meters for device testing based on client criteria.

Spire | Developer

Project Overview: Oracle Utilities CC&B 2.6 Upgrade Compatibility Testing

- Tested various customizations to ensure compatibility with the targeted CC&B 2.6 environment.
- Updated customizations that utilized deprecated implementations.

Spire | Developer

Project Overview: CC&B 2.4 and 2.6 Custom Code Implementations

- Developed an inbound web service that extracted relevant information from linked accounts.
- Created customizations that transferred the balance of different service agreements under certain criteria.
- Created a CC&B batch program that expired quotes under certain criteria.
- Created code drops for the customizations for deployment to a higher environment.
- Investigated, fixed, and provided support for defects.

City of Jackson | Developer

Project Overview: Support for fixing Stranded Bills

- Assisted in resolving issues that prevented bills from being processed.

Orlando Utilities Commission | Developer

Project Overview: CC&B 2.6 Custom Code Implementations

- Created CC&B batch programs that extracted customer and financial information.
- Created CC&B customizations that updated dates in a usage request under certain criteria.
- Created components for proactive alerts, primarily inbound web services, which were used by the client to gather customer information and to reconnect services for eligible customers.
- Investigated, fixed defects, and provided support for various customizations.
- Created code drops for customizations for deployment to a higher environment.

Artesian Water | Developer

Project Overview: CC&B 2.6 Upgrade Conversion of Custom Common Business Oriented Language (COBOL) components to Java

- Translated custom 2.4 COBOL codes to Java for 2.6.
- Investigated, fixed defects, and provided support for the various customizations.

Green Mountain Power | Developer

Project Overview: CC&B Custom Code Implementations

- Extended CC&B's base bill print extract by retrieving additional financial information and customer consumption for display in a histogram.

Modesto Irrigation District | Developer

Project Overview: CC&B Custom Code Implementations

- Investigated, fixed defects, and provided support for the various customizations.

ENSTAR | Developer

Project Overview: CC&B 2.4 Custom Code Implementations

- Extended CC&B's base bill print extract.

Ergon Energy | Developer and Dev Support

Project Overview: CC&B 2.4 Solution Implementation

- Created a sub-module in COBOL that calculated interval data for processing.
- Created customizations in COBOL that calculated customer usage by grouping them by Time-Of-Use (PEAK or OFFPEAK) and entries in the SQL entry table of a bill segment.
- Created custom OSB components that facilitated communication between third parties and CC&B.
- Executed test scripts for the various CC&B components.
- Investigated, fixed defects, and provided support for the various customizations during the User Acceptance Testing (UAT) phase.
- Assisted in the stabilization efforts of the solution after go-live.
- Responsible for handling and resolving incident and problem tickets related to OSB and CC&B components.
- Created a Representational State Transfer (REST) Web Service in OSB for a digital display that forwards the request to a particular CC&B Explainable AI (XAI) inbound service depending on the request received.
- Created the Web Services Description Language (WSDL) for the REST Web Service and the XSLs needed to transform the request into a message that CC&B could process.

Électricité de France Energy | Developer

Project Overview: CC&B 2.4 Solution Implementation

- Modified the sub-modules of a custom bill print for CC&B in Java and COBOL.
- Investigated, fixed defects, and provided support for the various customizations.
- Modified the WSDL of FUSION Web Services.

Venkat Dongara – *Analytics Architect*

SPECIALIZATION

Venkat is an IT consultant with over 20 years of experience in Data Warehousing, Data Integration, and Business Intelligence using industry standards and advanced Data Visualization and ETL tools. He has successfully implemented numerous Oracle BI Solutions for Oracle Utilities Applications (CC&B, MDM, WMW, etc.) as well as for Oracle ERP Systems like EBS and Peoplesoft. He has implemented custom Datawarehouse solutions from scratch and delivered advance reporting solutions. Venkat has excellent knowledge of various Oracle Utilities Applications, ERP Systems, and government and retail domains. He is experienced working with multiple teams across various geographies and possesses excellent communication and interpersonal skills, analytical skills, troubleshooting skills. Venkat's attention to detail and his ability to learn quickly and be highly adaptable to new technologies and tools makes him a valuable member of any project team.

ACCOMPLISHMENTS

Venkat has been a key member of the successful delivery of multiple full life cycle implementations, upgrades, and IT projects. He has provided solution designs and data modeling for various BI implementation projects as well as served as a key project member to troubleshoot and fix out-of-the-box ETL, data, and reporting issues. Venkat is experienced in providing post-production support and user training, as well as coordinating with various teams in the project and participating in technical and process reviews.

PROFESSIONAL EXPERIENCE

Green Mountain Power | Sr. Oracle BI Architect / Consultant

Project Overview: Implementation of OUBI 2.4 for CC&B, MDM and MWM applications; Implementation of BIApps for EBS Financials, HR, Payroll and budgeting; Upgrade OUBI 2.4 to OUA 2.5.2 and then to OUA 2.7; Implementation of BigData / Hadoop Cloudera Cluster to handle huge set of measurement data from smart meters to fulfill various reporting needs using OBIEE and Tableau reporting tools

· Conducted the installation and configuration of OUBI / OUA, ODI, Oracle GoldenGate and OBIEE for CC&B, MDM, MWM, GIS as source applications.
· Provided administration and DBA support to all BI projects.
· Performed data/application refreshes and monitored ETL loads and application performance.

Fayetteville Public Works Commission | Oracle BI / DBA Consultant

Project Overview: Implementation of CC&B, MWM, WAM and BIApps for EBS

· Conducted infrastructure planning and sizing of BI and other utilities applications (CC&B, MWM and WAM).
· Lead the install and configuration of OBIEE, BIApps, Informatica and DAC for various EBS modules.
· Setup ETL jobs, monitored daily loads, and completed upgrades and patching.

City of Raleigh, Raleigh, NC | Sr. Oracle DBA Consultant

Project Overview: Implementation of CC&B and Peoplesoft

- Provided DBA support for SOA, PeopleSoft Upgrade
- Reviewed database upgrade and cutover planning steps while following best practices to minimize upgrade time.
- Monitored database and servers during peak & non-peak business hours to identify performance bottlenecks.

American Electric Power (AEP), Columbus, OH | Sr. Oracle DBA

Project Overview: PeopleSoft Upgrade, Commercial Operations, DWMS and IT IS / ArcGIS Projects

- Provided DBA support for SOA, Peoplesoft Upgrade
- Reviewed database upgrade and cutover planning steps while following best practices to minimize upgrade time.
- Monitored database and servers during peak & non-peak business hours to identify performance bottlenecks.

Nechal Singh – *Analytics Developer*

SPECIALIZATION

Nechal is an IT consultant with over 13 years of experience working in Data Warehousing, Data Integration, and Business Intelligence (BI) in various industries including utilities, government, energy, and capital markets. He has experience in Oracle Customer to Meter (C2M), Oracle Utility Analytics (OUA), and Customer Care & Billing (CC&B) He is well versed in using industry standards and advanced Data Visualization and ETL tools. He has technical expertise in building Custom Data Warehouses from scratch and delivering reporting solutions. Nechal possesses excellent communication and interpersonal skills, good analytical reasoning, and has the ability to learn quickly and be highly adaptable to new technologies and tools.

ACCOMPLISHMENTS

Nechal has been a key member of the successful delivery of multiple full life cycle implementations, upgrades, and IT projects. He has helped businesses achieve a single view of the business-critical data from disparate and duplicate information sources as well as helped businesses achieve a 360-degree view of customer relationships. Overall, Nechal is well versed in identifying the relationship insights within the data to locate connections between customers, products, suppliers, and accounts.

PROFESSIONAL EXPERIENCE

Nashville Electric Service | Sr. Oracle BI Consultant (ETL and OBIEE)

Project Overview: The encompass project uses the C2M system as their primary data source to generate analytical and operational reports to serve various lines of business with day to day reporting needs using OUA.

- Converted functional requirements into technical design using the hybrid methodology with star schema and snowflake Datawarehouse design.
- Managed the Installation and configuration of the ETL and front-end reporting stack across environments
- Configured the OUA admin tool to feed information for Revenue Analytics, A/R analytics, Customer Analytics, Credit and Collections Analytics, Meter management Analytics and Usage Analytics.

Pacific Gas and Electric | Sr. Oracle BI Consultant (ODI and OBIEE)

Project Overview: The Customer Revenue Critical Reporting project uses the CC&B system as their primary data source to generate analytical and operational reports to serve Corporate Accounting, Revenue operations, Billing operations & Field operations line of businesses with day-to-day reporting needs using OUA.

- Helped the business with Plan and Analyze and fit gap analysis to identify the scope of work involving Revenue Analytics, A/R analytics, Customer Analytics, Credit and Collections Analytics, Meter management Analytics and Usage Analytics.
- Converted functional requirements into logical and physical data models using the hybrid methodology with star schema and snowflake Datawarehouse design.
- Managed the Installation and configuration of the ETL and front-end reporting stack across environments

Jinelle D'souza – *CC&B Functional Architect / Training Lead*

SPECIALIZATION

Jinelle is a Business Analyst with a specialization in helping clients recover revenue and achieve steady state as part of their post-production support. She is proficient in documenting requirements, developing solution designs, validating system functionality, configuring and testing Meter-to-Cash (M2C) modules for Customer Care and Billing (CC&B), Meter Data Management (MDM), and 3rd party interfaces. She has played a pivotal role in helping clients resolve high-volume exceptions generated post go-live and developing solutions for reducing delayed unbilled revenue.

ACCOMPLISHMENTS

Jinelle has been involved in four large $20-$40M revenue recovery projects as part of a SWAT Team to alleviate delayed revenue. Jinelle has implemented several processes for client billing efficiency, leak adjustment management, field work, collections, and to-do management. A recent highlight is a process she developed to forecast collections volume at various debt thresholds to help the client manage their daily workload for the volume of disconnect letters and turn-off field activities.

PROFESSIONAL EXPERIENCE

City of Jackson | Lead Business Analyst

Project Overview: Business Operations Support for the effective rollout of the Credit & Collections process, Meter & Field Work backlog resolution, and billing efficiency

- Responsible for the configuration and rollout of the Credit & Collections processes. Strategized the target accounts for Collections which increased monthly collections by 25%.
- Provided a forecasting process to manage the client's daily volume of disconnects to help them effectively allocate resources for collecting payments, performing disconnects, and reconnects.
- Helped resolve CC&B billing exceptions which enabled the client to bring 20,000 customers to current. In addition, billed over $13M in missing revenue over three months.
- Performed configuration of cases to meet business needs for High Bill Complaints and Leaks.
- Re-configured the meter reading and billing windows for each billing cycle to ensure meter reads in CC&B fall within the acceptable selection range for billing.
- Provided scripts to identify and resolve hi-low exceptions generated by meter reads within the billing window.
- Implemented a process and developed a calculator to expedite adjustments for accounts with a Leak Alert seen in the MDM system.
- Designed and developed strategic and operational dashboards in QLIK Sense Analytics to drive Revenue Management and Collections strategy.
- Developed reports using SQL to provide insight into the issues affecting the client's business stability related to billing, collections, field work backlog, and meters not communicating in MDM.
- Collaborated with the client to identify business requirements and designed customizations to enhance base application functionality and introduce additional controls to drive future state business processes.

- Performed testing of a custom batch to process meter exchanges at the Mueller MDM system / CC&B interface.

Orlando Utilities Commission | Functional Architect

Project Overview: Customer Relationship Management IT Support Team, Revenue Recovery for multi-month delayed bills

- Developed requirements and functional design documents for meter reading, water meter backflow device testing, and maintenance.
- Reviewed technical designs provided by the developer to ensure all functional requirements were correctly mapped.
- Developed SQL scripts / reports to provide insight into customer data to drive business decisions.
- Helped write-off billing usage associated with delayed multi-month bills and add adjustments for customers with large leaks that had not received their bill for up to 3 months.
- Resolved CC&B exceptions for negative usage and service agreements that were activated but never billed.
- Performed scalar override for Initial Measurement Data (IMD) reads in MDM to ensure good reads are used for billing.
- Provided training to the client billing team for resolving delayed bills with payment arrangements.

Modesto Irrigation District | Functional Analyst

Project Overview: Customer Information System (CIS) Implementation to replace all legacy systems with CC&B, MDM, CSS, and Analytics

- Identified functional gaps between CC&B and the client's legacy system and assisted in establishing modified business processes based on industry best practices.
- Reviewed business processes to map out and configure the workflow of events in CC&B with the interfaces.
- Configured the system for security profiles for users based on business roles for the various functional areas like field work, meter reading, billing, accounting, and payment arrangement.
- Developed test scripts for all 3rd party payment applications interfacing with CC&B, field work, bill print testing, collection letters, and payment files.
- Resolved meter reading validations exceptions from MDM due to inconsistencies in meter programming and read file values.
- Led the defect triage sessions to identify and resolve defects related to CSS, payments, and MDM to dos.
- Performed testing and support activities to facilitate the Credit and Collections rollout.
- Provided front-line post-production support for the Billing and Customer Service departments.

Los Angeles Department of Water & Power | Quality Assurance Lead

Project Overview: $40M Revenue Recovery effort as part of the SWAT go-live team

- Piloted a Quality Assurance process by defining performance metrics to audit 60,000 delayed bills, reduce billing and establish an accountability system for the client's billing department.
- Managed the worklist of backlog accounts from pending ITRON smart meter installations, start / stop service agreements, and legacy system data conversion issues to alleviate the high revenue.

- Subject Matter Expert (SME) to the Executive team for Oracle CC&B queries and rebilling of inaccurate accounts to ensure minimum customer impact for premier accounts.
- Performed User Acceptance Testing (UAT) testing and training for customizations for estimation and high / low exception parameters.
- Responsible for evaluating the weekly performance of 40 analysts to ensure high quality deliverables and conducted review sessions to suggest improvements.
- Conducted and produced training material for on-boarding of new Business Analysts specifically in business procedures, CC&B operations, and utilities overview to ensure on-par performance with project standards.
- Responsible for the system improvement project to perform data clean-up, modification to system configurations and billing support of back-log tasks to ensure successful system functionality.
- Coordinated weekly review sessions with the Project / Client team to maintain Project Timelines.
- Standardized and documented business processes for the client to facilitate knowledge transfer during the project hand-off.

ACTION CALENDAR

2021 LEGISLATIVE AND REGULATORY UPDATE

SUMMARY:

This report provides an update on the 2021-2022 legislative session, regulatory issues, and IRWD priorities. As legislation and regulations develop, staff will provide updates and recommendations to the Water Resources Policy and Communications Committee and the Board, as appropriate.

Staff recommends the Board consider the following actions/positions:

- *SB 222 (Dodd) – Water Affordability Assistance: "CONCERNS";*

- *SB 223 (Dodd) – Discontinuation of Residential Water Service: "OPPOSE UNLESS AMENDED";*

- *ACWA's Water Rate Validations Proposal: "SUPPORT";*

- *CASA's Flushable Products State and Federal Legislation: "SUPPORT"; and*

- *$85 Million Budget Proposal for Regional Forest and Fire Capacity Program Funding: "SUPPORT".*

BACKGROUND:

January 22 was the last day for bills to be submitted to the Office of the Legislative Counsel. The bill introduction deadline this year is February 19, although resolutions and constitutional amendments can be introduced after that date. The first policy committee deadlines are in late April and early May. A copy of the 2021 Legislative Matrix is provided as Exhibit "A". Links to the bills discussed below are included within each discussion unless a separate exhibit is noted.

2021 State Legislative Update:

Eviction Moratorium Extension and State Rental Assistance Program:

On January 25, 2021, in advance of the January 31, 2021, expiration of the eviction moratorium that was enacted into law by AB 3088 (Chiu, D-San Francisco), Governor Gavin Newsom, Senate President pro Tempore Toni Atkins (D-San Diego), and Assembly Speaker Anthony Rendon (D-Lakewood) issued a joint statement announcing an agreement to extend the moratorium through June 30, 2021.

On the day the deal was struck, legislation was introduced to codify the deal - SB 91 (Committee on Budget and Fiscal Review). The measure, which was signed by the Governor on January 29, extends the various provisions of the eviction moratorium through June 30, 2021, and

appropriates $1.5 billion of federal COVID-19 relief funds for a new state program for providing rental assistance. The $1.5 billion in federal funding can be used for rental assistance which is defined as including:

- Rental arrears;
- Prospective rent payments;
- Utilities, including arrears and prospective payments for utilities; and
- Other expenses related to housing.

The legislation provides that rental arrears are to be given priority for the funding.

Through the program, the State will fund up to 80 percent of an eligible household's unpaid rental debt accumulated from April 1, 2020, to March 31, 2021. To be eligible to receive these funds, a landlord is required to forgive 20 percent of the unpaid rental debt accumulated between April 1, 2020, and March 31, 2021, and accept 80 percent of unpaid rental debt as payment in full of rental debt owed by an eligible tenant.

If a landlord does not accept 80 percent of unpaid rental debt as payment in full of rental debt owed, then a member of an eligible household may apply for rental arrears assistance of 25 percent of the eligible household's unpaid rental debt accumulated from April 1, 2020 through March 31, 2021. The significance of 25 percent of the eligible household's unpaid rental debt is that the eviction moratorium prevents landlords from evicting a tenant for non-payment of rent as long as the tenant pays at least 25 percent of the rent owed.

This program will only fund rental assistance for households with income below 80 percent of the area median income. Priority for rental assistance will be given to households with income below 50 percent of the area median income and communities disproportionately impacted by COVID-19. The legislation requires that priority be given to rental arrears to prevent evictions; it also allows remaining funds to be used for prospective rental payments and payments for utility bills.

It should be noted that the $1.5 billion is money the State received from the latest federal COVID-19 relief legislation for rental assistance. Cities and counties with a population of at least 200,000 also received $1.1 billion from the last federal COVID-19 relief package. SB 91 allows, but does not require, cities and counties to use their funds for rental assistance through the State program.

Groups representing landlords and tenants were involved in the negotiations on extending the eviction moratorium. The California Apartment Association is reported as being satisfied that the deal includes the payment of back rent owed to landlords. Other reports have indicated that Assemblymember David Chiu (D-San Francisco), who was the author of the bill that enacted the original moratorium, along tenant groups, are dissatisfied with the new legislation and the fact that landlords being given the option to decline federal rental relief.

On February 4, 2021, staff discussed SB 91 with the Water Resources Policy and Communications Committee (Committee) and additional legislative proposals that have been introduced on rent relief.

COVID-19 Financial Relief for Water Agencies:

The rental assistance program created by SB 91 provides that the utility bills are an eligible expense for which the federal funding can be used to pay; however, it is unclear how much, if any, of the funding will go toward the payment of outstanding water bills related to the COVID-19 shutoff moratorium. While it is unclear how much of the $1.5 billion will go towards water debt, the last federal COVID-19 relief package included $638 million for low-income water and sewer customer assistance. This funding is being provided to states and tribes who are then to provide the funding to public water systems to reduce low-income household arrearages and rates. The District has been working with others in the water community to seek appropriation of California's portion of this federal funding. At the Committee meeting, staff provided an update on the status of these efforts.

Low-Income Rate Assistance Program (LIRA) & SB 222 (Dodd):

AB 401 (Dodd, 2015) required the State Water Resources Control Board to develop and provide the Legislature a plan for a statewide Low-Income Rate Assistance Program (LIRA) by February 1, 2018. As a result, the State Board held a series of public meetings in 2017 seeking input on various scenarios, which would provide low-income rate assistance to up to 34 percent of Californians, and over two years would meet with a smaller group of stakeholders to discuss options for the plan. The State Board's effort is based on the following philosophy:

> "Californians have a right to safe water. State policy through AB 685 (2012) aims to ensure universal access to water by declaring that "every human being has the right to safe, clean, affordable, and accessible water adequate for human consumption, cooking, and sanitary purposes." However, water is becoming more expensive. California's growing economy and population create continued demand for water. Meanwhile, drought and water leaks tighten available supplies. In addition, pipes and aging infrastructure result in expensive repairs or replacements. These conditions contribute to higher costs. The result is that more low-income households have unaffordable drinking water."
> *(http://www.waterboards.ca.gov/water_issues/programs/conservation_portal/assistance/)*

In early 2019, State Board staff released a draft plan for implementing LIRA. After accepting public comments on the draft plan, in February 2020, the State Board finalized the report titled "Recommendations for Implementation of a Statewide Low-Income Water Rate Assistance Program."

Following up on the report's release last year, Senator Bill Dodd (D-Napa) introduced SB 222 on January 14, 2021, which seeks to establish a statewide Water Affordability Assistance Program (WAAF). The WAAF, if funded, would help provide water affordability assistance, for both drinking water and wastewater services, to low-income ratepayers and ratepayers experiencing economic hardship in California, and would be run by the State Board.

The State Board would be required to adopt an annual fund expenditure plan for the WAAF
Program. The annual fund expenditure plan would need to include, among other things, criteria
and metrics for the WAAF Program and an estimate of the number of households eligible for
assistance.

While SB 222 proposes a structure for a statewide low-income rate assistance program, it does
not propose a funding source for such a program. Despite this, as currently outlined in SB 222,
the WAAF Program, could be used to provide:

- Direct water bill assistance;

- Water bill credits to renters and individuals or households that pay other amounts, fees, or
  charges related to residential water or wastewater service;

- Water crisis assistance;

- Affordability assistance to low-income households served by domestic wells;

- Water efficiency measures for low-income households; and

- Short-term assistance to public water systems to administer program components,
  including initial startup costs.

In addition to establishing the structure for a statewide LIRA program, SB 222 would provide the
State Board the authority to:

- Collect and ensure the accuracy of water rate data and water system boundary data from
  each public water system;

- Coordinate with the Public Utilities Commission regarding existing rate assistance
  programs for investor-owned water utilities;

- For a public water system that is not regulated by the Public Utilities Commission,
  provide oversight of the public water system's implementation of the program to ensure
  effectiveness and prevent fraud, waste, and abuse;

- Develop and publish performance metrics for the program, including, but not limited to,
  enrollment levels, total water shutoffs for inability to pay, and on-time payment levels;

- Coordinate with other state agencies and resolve disputes as necessary; and

- Identify alternative entities to distribute and track benefits if a public water system is
  unwilling to do so or if the State Board has determined a public water system is incapable
  of administering the program.

SB 222 has created a tremendous amount of discussion within the water community. Staff has
engaged with industry associations and stakeholders in evaluating the bill. The Association of
California Water Agencies (ACWA) and the California Municipal Utilities Association (CMUA)
are having initial conversations with the author and sponsors regarding the water industry's
concerns. At this time, staff recommends the Board adopt a "concerns" position on SB 222.

SB 223 (Dodd) – Discontinuation of Residential Water Service:

In 2018, SB 998, authored by Senator Dodd, established new statutory provisions governing when a public water system may discontinue water service at a residential property. Among its many provisions, the bill prohibited a public water system from discontinuing residential water service for nonpayment until a customer has been delinquent for at least 60 days and has been provided adequate notice about their options to avoid discontinuation of their water service. The bill also prohibited, if certain situations exist, the discontinuation of water service. SB 998 prohibited the discontinuation of residential water service where all of the following conditions are met:

- The customer, or a tenant of the customer, submits to the water provider certification from a licensed medical professional that that discontinuation of residential service will be life-threatening to, or pose a serious threat to, the health and safety of a resident of the premises where the service is being provided;

- The customer demonstrates that he or she is financially unable to pay their bill within the normal payment period; if any member of the customer's household is a 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 he or she declares that the household's annual income is less than 200 percent of the federal poverty level; and

- The customer is willing to enter into an amortization agreement, alternative payment schedule or plan for deferred or reduce payment with respect to the delinquent charges.

Additionally, the bill limited a water provider's ability to discontinue service if the customer is delinquent on a payment required under an amortization agreement, alternative payment schedule or plan for deferred or reduced payment plan. The bill required that service could not be discontinued until the customer was 60 days delinquent on those charges. SB 998 limited reconnection fees and interest charges on past due bills. SB 998 was heavily negotiated between Senator Dodd and the water community. SB 998 took effect February 1, 2020, for urban water suppliers.

On January 14, 2021, Senator Dodd introduced SB 223 which seeks to substantially amend the provisions enacted by SB 998 and specifically seeks to modify a number of the provisions negotiated with the water community. Of note, SB 223 would prohibit a water supplier from discontinuing residential water service for nonpayment until a payment by a customer has been delinquent for at least 120 days, rather than 60 days, and until the total amount of delinquency, exclusive of late charges and interest, is at least $400. The bill would also ban any discontinuation of water service for nonpayment at master-metered multi-family residences. SB 223 would also require water suppliers to:

- Implement an arrearage management plan which requires that the water supplier forgive at least 1/12 of the delinquent balance owed by a customer with each consecutive on-time payment of the monthly water service charge made by a customer;

- Offer free water audits to low-income residential customers with water usage that is above the "annual average volume usage of their customer class;" and

- Provide the customers with a payment arrangement, including an arrangement management plan that includes forgiveness of the arrearages, that best assists the customer in avoiding discontinuation of water service over the long term.

Additionally, SB 223 prohibited discontinuation of water service during any "state or local emergency," and if a customer meets all of the following:

- The customer self-certifies, orally or in writing, that a resident of the premises is older than 65 years of age, younger than 18 years of age, or if a customer certifies that discontinuation of water service would be life threatening or pose a serious threat to health and safety of a resident at the premises;

- The customer demonstrates they are financially unable to pay within the normal billing cycle of the water provider; and

- The customer enters into an amortization agreement, alternative payment schedule, arrearage management plan, or plan for deferred or reduced payment.

The bill provided that customers with any member of the household currently enrolled in the California Alternative Rates for Energy (CARE), 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 if the customer declares that the household's annual income is less than 200 percent of the federal property level and are financially unable to pay.

Additionally, SB 223 prohibits a water supplier from charging these customers late fees, interest, penalties, or a disconnection or reconnection fee. SB 223 would also extend all of these provisions to small water suppliers.

Given that SB 998 was negotiated with the water community and had been in effect for only one month prior to the statewide COVID-19 shutoff moratorium being put into place, it is unclear if further changes to California's discontinuation of service rules are needed at this time. Furthermore, as currently drafted, SB 223 present challenges with Proposition 218 and other constitutional provisions. Given these factors, along with the impact the bill would have on the District, staff recommends the Board adopt an "oppose unless amended" position on SB 223.

Water Rate Validations:

As previously discussed with the Board, ACWA is sponsoring legislation to permit validation actions for water, wastewater and sewer rates and charges. The proposal, which will be authored by Senator Anna Caballero (D- Salinas), would provide that:

> "Any judicial action or proceeding to attack, review, set aside, void, or annul an ordinance, resolution, or motion adopting a fee or charge for water or sewer service, or modifying or amending an existing fee or charge for water or sewer service, shall be commenced within 120 days of the effective date of the ordinance, resolution, or motion."

If enacted, this proposal would create a 120-day statute of limitations for lawsuits challenging water and sewer rates. The full text of the bill, which will be introduced shortly, is provided in Exhibit "B". Staff recommends the Board take a "support" position on the proposal.

Flushable Products Legislation:

In recent years, wipes labeled as flushable have gained popularity, which encourages residents to dispose of wipes products generally in their toilets instead of in the trashcans. This can result in the wipes being caught in pipes and can cause problems for wastewater infrastructure and treatment facilities. These products often combine with fats, oils, and grease and become larger obstructions within sewer systems, which can result in costly sewer overflows. Last year, the California Association of Sanitation Agencies (CASA) sponsored AB 1672 (Bloom, D-Santa Monica), which is a proposal that would require non-flushable wipes to be labeled clearly and conspicuously to communicate that they should not be flushed. IRWD supported the bill, but the bill was not enacted. CASA, along with the wipes industry, are co-sponsoring the proposal again this year. While the bill has yet to be introduced, it will be similar to AB 1672 and the deal struck between CASA and the industry last year. Staff recommends that the District readopt a "support" position on the legislation again this year.

CASA is also going to seek introduction of this legislation at the federal level. Staff recommends the Board authorize the District to take a "support" position on that legislation once it is introduced if it is similar to AB 1672.

Regional Forest and Fire Capacity Program Funding:

The County of Orange Area Safety Task Force (COAST) is a collaboration between nearly three dozen public agencies, municipalities, landowners, land managers, and other organizations that have an interest in wildland fire in Orange County. The group was convened several years ago by the Orange County Fire Authority to collaborate to reduce the frequency, spread, and impact of wildfires in Orange County.

At the January 28, 2021, meeting of COAST, a presentation was made to inform the group of a funding item in Governor Newsom's proposed Fiscal Year 2021-22 state budget that presents an opportunity for COAST to receive state funding. COAST has to this point operated without funding for dedicated staff capacity and support, and it has a keen interest in potential opportunities for state and/or federal funding.

The Governor's proposed state budget includes $85 million over the current budget year and the next budget year for the Regional Forest and Fire Capacity Program. This program is presently funding groups in San Diego County, the Inland Empire, and the Santa Monica Mountains that are similar to COAST. COAST has been communicating with the Program's staff, and it appears that COAST may be eligible for funding through the Program. COAST receiving such funding would benefit Orange County and IRWD. Staff recommends the Board adopt a "support" position on the $85 million included in the Governor's proposed budget. Such a position would allow staff to communicate the District's support for the funding with the Legislature and the Administration.

Other State Legislation of Interest to IRWD:

Staff also discussed the following bills/topics with the Committee:

- Legislation related to Connection Fees & Development Impact Fees;

- Climate resilience bond proposals;

- SB 230 (Portantino, D-Glendale) – Constituents of Emerging Concern Program;

- Legislation Proposal for the Small System Water Authority Act;

- State funding for atmospheric river research;

- Legislation related to recycled water; and

- Other newly introduced legislation.

2021 State Regulatory Update:

The following is a list of some of the State regulations and agency reports staff is monitoring, tracking or planning to engage in over the next three to 12 months. As the next drafts of the regulations or report are released for public review and comment, staff will engage, as appropriate.

The pending regulations and reports actively being tracked include the:

- Board of Forestry and Fire Protection's proposal for "Fire Safe Regulations;"

- California Air Resources Board's proposed "Advanced Clean Trucks Regulation;"

- California Air Resources Board's Heavy-Duty Vehicle Inspection and Maintenance Program;

- California Plumbing Code Update;

- California Water Commission Workshops on Water Conveyance;

- Department of Water Resources (DWR) and the State Board's implementation of the "Making Water Conservation a California Way of Life" legislation;

- Implementation of Executive Order EO-N-82-2020 requiring 30 percent of the state's land and coastal waters to be conserved by 2030;

- Implementation of the Governor's Water Resiliency Portfolio;

- State Board's development of a "Cross Connection Policy Handbook;"

- State Board's Electronic Annual Report;

- State Board's Safe and Affordable Funding for Equity and Resilience (SAFER) Drinking Water Program; and

- State Board's Water Loss Performance Standards Regulations.

2021 Federal Legislative Update:

IRWD's federal advocacy efforts in 2021 continue to largely focus on seeking federal funding for the Kern Fan Groundwater Storage Project and advocating for an increased funding authorization for the federal Water Storage Program. As the nation's attention has shifted to COVID-19, staff and the District's advocates have been tracking the federal legislation dealing with the coronavirus. Staff also continues to track federal legislation related to infrastructure funding. Staff updated the Committee on these efforts and on the ongoing efforts related to positioning the Kern Fan Groundwater Storage Project for federal funding this year, and other federal proposals of interest to the District.

FISCAL IMPACTS:

Not applicable.

ENVIRONMENTAL COMPLIANCE:

Not applicable.

COMMITTEE STATUS:

This item was reviewed by the Water Resources Policy and Communications Committee on February 4, 2021.

RECOMMENDATION:

THAT THE BOARD ADOPT A "CONCERNS" POSITION ON SB 222 (DODD), AN "OPPOSE UNLESS AMENDED" POSITION ON SB 223 (DODD), A "SUPPORT" POSITION ON ACWA'S WATER RATE VALIDATIONS PROPOSAL, A "SUPPORT" POSITION ON CASA'S FLUSHABLE PRODUCTS STATE AND FEDERAL LEGISLATION AND A "SUPPORT" POSITION ON THE $85 MILLION BUDGET PROPOSAL FOR THE REGIONAL FOREST AND FIRE CAPACITY PROGRAM.

LIST OF EXHIBITS:

Exhibit "A" – IRWD Legislative Matrix
Exhibit "B" – Text of ACWA's Water Rate Validations Proposal

Note: This page is intentionally left blank.

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
AB 1 Garcia (D)	Hazardous Waste		Creates the Board of Environmental Safety in the California Environmental Protection Agency. Provides requirements for the membership of the board and requires the board to conduct no less than 6 public meetings per year. Provides for the duties of the bo	01/11/2021 - To ASSEMBLY Committee on ENVIRONMENTAL SAFETY AND TOXIC MATERIALS.
AB 2 Fong (R)	Regulations: Legislative Review: Regulatory Reform		Requires the Office of Administrative Law to submit to each house of the Legislature for review a copy of each major regulation that it submits to the Secretary of State. Requires each state agency to review that agency's regulations, identify any regulat	01/11/2021 - To ASSEMBLY Committee on ACCOUNTABILITY AND ADMINISTRATIVE REVIEW.
AB 5 Fong (R)	Greenhouse Gas Reduction Fund: High Speed Rail		Suspends the appropriation to the High-Speed Rail Authority for the 2021-22 and 2022-23 fiscal years and requires the transfer of those amounts from moneys collected by the State Air Resources Board to the General Fund. Specifies that the transferred amou	01/11/2021 - To ASSEMBLY Committees on TRANSPORTATION and NATURAL RESOURCES.
AB 6 Levine (D)	Health Facilities: Pandemics and Emergencies: Practices		Requires the State Department of Public Health and the State Department of Social Services to collaborate to create health and safety guidelines and a description of best practices for use by skilled nursing facilities, intermediate care facilities, and c	01/11/2021 - To ASSEMBLY Committee on HEALTH.
AB 9 Wood (D)	Wildfires		States the intent of the Legislature to enact subsequent legislation that would increase California's capacity to prevent and reduce the impact of wildfires.	12/07/2020 - INTRODUCED.
AB 11 Ward (D)	Climate Change: Regional Climate Change Authorities		Requires the Strategic Growth Council to establish regional climate change authorities to coordinate climate adaptation and mitigation activities in their regions and coordinate with other regional climate adaptation authorities, state agencies, and other	01/21/2021 - From ASSEMBLY Committee on NATURAL RESOURCES with author's amendments.;01/21/2021 - In ASSEMBLY. Read second time and amended. Re-referred to Committee on NATURAL RESOURCES.

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IRWD 2021 LEGISLATIVE MATRIX
Updated 02/01/2021

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
AB 15 Chiu (D)	COVID-19 Relief: Tenancy Stabilization Act of 2021		Extends the definition of "COVID-19 rental debt" as unpaid rent or any other unpaid financial obligation of a tenant that came due between March 1, 2020, and December 31, 2021. Extends the repeal date of the COVID-19 Tenant Relief Act of 2020 to January 1	01/11/2021 - To ASSEMBLY Committee on HOUSING AND COMMUNITY DEVELOPMENT.
AB 16 Chiu (D)	Tenancies: Tenant, Small Landlord, and Housing Act		Establishes the Tenant, Small Landlord, and Affordable Housing Provider Stabilization Program. Authorizes the Director of Housing and Community Development to direct an existing office or program within the Department of Housing and Community Development	01/12/2021 - From ASSEMBLY Committee on HOUSING AND COMMUNITY DEVELOPMENT with author's amendments.;01/12/2021 - In ASSEMBLY. Read second time and amended. Re-referred to Committee on HOUSING AND COMMUNITY DEVELOPMENT.
AB 20 Lee (D)	Political Reform Act of 1974: Clean Money Act of 2021		Enacts the Clean Money Act of 2021, would prohibit a candidate for elective office from receiving a contribution from a business entity, and a business entity from making a contribution to a candidate for elective office, and would make related findings a	01/11/2021 - To ASSEMBLY Committee on ELECTIONS.
AB 25 Kiley (R)	Worker Classification: Employees and Contractors		Generally repeals provisions relating to the "ABC" test to determine if workers are employees or independent contractors. The bill would instead require the determination of whether a person is an employee or an independent contractor to be based on the s	01/11/2021 - To ASSEMBLY Committee on LABOR AND EMPLOYMENT.
AB 29 Cooper (D)	State Bodies: Meetings		Requires that the notice of a meeting of a state body include all writings or materials provided for the noticed meeting to a member of the state body by the staff of a state agency, board, or commission, or another member of the state body that are in co	01/11/2021 - To ASSEMBLY Committee on GOVERNMENTAL ORGANIZATION.
AB 33 Ting (D)	Natural Gas		Prohibits the Department of General Services from approving or providing funding from the construction on new school buildings that have natural gas connections. Prohibits new public buildings for which construction begins on or after January 1, 2022, to	01/11/2021 - To ASSEMBLY Committees on UTILITIES AND ENERGY and NATURAL RESOURCES.

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Bill No. Author	Title	IRWD Position	Summary/Effects	Status
AB 49 Petrie-Norris (D)	California Debt Limit Allocation Committee		States the intent of the Legislature to enact future legislation that would eliminate the California Debt Limit Allocation Committee and that would transfer the duties and authority of that committee to the California Tax Credit Allocation Committee.	12/07/2020 - INTRODUCED.
AB 50 Boerner Horvath (D)	Climate Adaptation Center and Regional Support Network		Establishes the Climate Adaptation Center and Regional Support Network in the Ocean Protection Council to provide local governments facing sea level rise challenges with information and scientific expertise necessary to proceed with sea level rise mitigat	01/11/2021 - To ASSEMBLY Committee on NATURAL RESOURCES.
AB 51 Quirk (D)	Regional Climate Adaptation Planning Groups		Requires the Strategic Growth Council, by July 1, 2022, to establish guidelines for the formation of regional climate adaptation planning groups. Requires the council, by July 1, 2023, and in consultation with certain state entities, to develop criteria f	01/11/2021 - To ASSEMBLY Committee on NATURAL RESOURCES.
AB 52 Frazier (D)	California Global Warming Solutions Act of 2006		Requires the State Air Resources Board, in each scoping plan update prepared by the state board after January 1, 2022, to include, consistent with the Global Warming Solutions Act of 2006, recommendations for achieving the maximum technologically feasible	01/11/2021 - To ASSEMBLY Committee on NATURAL RESOURCES.
AB 53 Low (D)	Election Day Holiday		Adds the day on which a statewide general election is held, which is the first Tuesday after the first Monday in November of any even-numbered year, to the list of holidays. Requires community colleges and public schools to close on any day on which a sta	01/11/2021 - To ASSEMBLY Committees on ELECTIONS and GOVERNMENTAL ORGANIZATION.
AB 55 Boerner Horvath (D)	Employment: Telecommuting		Declares the intent of the Legislature to enact future legislation to ensure certain rights and benefits for telecommuting employees.	12/07/2020 - INTRODUCED.

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
AB 59 Gabriel (D)	Mitigation Fee Act: Fees: Notice and Timeliness	OPPOSE	Relates to the Mitigation Fee Act. Increases, for fees and service charges and for fees for specified public facilities, the time for mailing the notice of the time and place of the meeting to at least 45 days before the meeting. Requires the local agency	01/11/2021 - To ASSEMBLY Committees on LOCAL GOVERNMENT and HOUSING AND COMMUNITY DEVELOPMENT.
AB 63 Petrie-Norris (D)	Marine Resources: Marine Managed Areas Improvement Act		Relates to the Marine Managed Areas Improvement Act, restoration activities. Authorizes the designating entity or managing agency to also permit restoration activities.	01/11/2021 - To ASSEMBLY Committee on WATER, PARKS AND WILDLIFE.
AB 64 Quirk (D)	Electricity: Renewable Energy and Zero-Carbon		Requires the PUC, Energy Commission, and State Air Resources Board, in consultation with all balancing authorities, to additionally develop a strategy, by an unspecified date, on how to achieve a specified state policy in a cost-effective and environment	01/11/2021 - To ASSEMBLY Committees on UTILITIES AND ENERGY and NATURAL RESOURCES.
AB 67 Petrie-Norris (D)	Sea Level Rise: Working Group: Economic Analysis		Requires a state agency to take into account the current and future impacts of sea level rise when planning, designing, building, operating, maintaining, and investing in infrastructure located in the coastal zone or otherwise vulnerable to flooding from	01/11/2021 - To ASSEMBLY Committee on NATURAL RESOURCES.
AB 68 Salas (D)	Affordable Housing: California State Auditor's Report		States the intent of the Legislature to enact legislation that would implement recommendations made in the California State Auditor's Report 2020-108, issued on November 17, 2020, relating to affordable housing.	12/07/2020 - INTRODUCED.
AB 69 Kiley (R)	State of Emergency: Termination After 60 Days		Requires a state of emergency to terminate 60 days after the Governor's proclamation of the state of emergency unless the Legislature extends it by a concurrent resolution. Prohibits a concurrent resolution from extending a state of emergency by more than	01/11/2021 - To ASSEMBLY Committee on EMERGENCY MANAGEMENT.

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
AB 72 Petrie-Norris (D)	Environmental Protection: Coastal Adaptation Projects		Enacts the Coastal Adaptation Permitting Act of 2021. Requires the Natural Resources Agency to explore, and authorize it to implement, options within the agency's jurisdiction to establish a more coordinated and efficient regulatory review and permitting	01/11/2021 - To ASSEMBLY Committee on NATURAL RESOURCES.
AB 79 Ting (D)	Budget Act of 2021		Amends the Budget Act of 2020 by adding items of appropriation and making other changes. Declares that it is to take effect immediately as a Budget Bill.	01/27/2021 - In SENATE. Read second time. To third reading.
AB 80 Budget Cmt	COVID-19 Relief: Tenancy: Federal Rental Assistance		Extends the imposition of additional damages, if a tenant has provided a declaration of COVID-19 financial distress, on a landlord who violates the prohibition from interrupting or terminating utility service furnished to a tenant with the intent to termi	01/27/2021 - In SENATE. Read second time. To third reading.
AB 93 Garcia E (D)	Pandemics: Priority for Medical Treatment: Food Supply		States the intent of the Legislature to enact legislation to prioritize workers in the food supply industry, including, but not limited to, field workers and grocery workers, for rapid testing and vaccination programs in response to pandemics, including C	12/07/2020 - INTRODUCED.
AB 95 Low (D)	Employees: Bereavement Leave		Enacts the Bereavement Leave Act of 2021. Requires an employer with 25 or more employees to grant an employee up to 10 business days of unpaid bereavement leave upon the death of a spouse, child, parent, sibling, grandparent, grandchild, or domestic partn	01/11/2021 - To ASSEMBLY Committee on LABOR AND EMPLOYMENT.
AB 96 O'Donnell (D)	Clean Truck, Bus, and Off-Road Vehicle and Technology		Extends the requirement that 20% of funding be made available to support early commercial deployment of existing zero- and near-zero-emission heavy-duty truck technology until December 31, 2026. The bill would further require at least 20% of that funding	01/11/2021 - To ASSEMBLY Committees on TRANSPORTATION and NATURAL RESOURCES.

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
AB 100 Holden (D)	Drinking Water: Pipes and Fittings: Lead Content		Defines "lead free" under the California Safe Drinking Water Act, with respect to end point devices, to mean that the devices do not leach more than one microgram of lead under certain tests and meeting a specified certification.	01/11/2021 - To ASSEMBLY Committee on ENVIRONMENTAL SAFETY AND TOXIC MATERIALS.
AB 108 Cunningham (R)	Governor's Emergency Orders and Regulations: Approval		Permits an order or regulation, or an amendment or rescission thereof, issued pursuant to specified California Emergency Services Act (CESA) provisions 60 or more days after the proclamation, to take effect only if approved by a concurrent resolution of t	01/11/2021 - To ASSEMBLY Committee on EMERGENCY MANAGEMENT.
AB 115 Bloom (D)	Planning and Zoning: Housing Development		Requires that a housing development be an authorized use on a site designated in any local agency's zoning code or maps for commercial uses if certain conditions apply. Provides that among these conditions, the bill would require that the housing developm	01/11/2021 - To ASSEMBLY Committees on HOUSING AND COMMUNITY DEVELOPMENT and LOCAL GOVERNMENT.
AB 119 Salas (D)	County Assessors: Direct Levies		Requires the county auditor, or other county officer designated by the county, to make publicly available on their internet website information about direct levies as defined, including the range of combined direct levies assessed on real property. Requir	01/26/2021 - From ASSEMBLY Committee on LOCAL GOVERNMENT with author's amendments.;01/26/2021 - In ASSEMBLY. Read second time and amended. Re-referred to Committee on LOCAL GOVERNMENT.
AB 123 Gonzalez (D)	Paid Family Leave: Weekly Benefit Amount		Revises the formula for determining benefits available pursuant to the family temporary disability insurance program, for periods of disability commencing after January 1, 2022, by redefining the weekly benefit amount to be equal to 90% of the wages paid	01/11/2021 - To ASSEMBLY Committee on INSURANCE.
AB 125 Rivas R (D)	Food and Agriculture: Climate Crisis: COVID-19 Recovery		States the intent of the Legislature to enact subsequent legislation to issue a bond to support solutions to the climate crisis and recovery from the COVID-19 pandemic that would create a more equitable and resilient food and farming system.	12/18/2020 - INTRODUCED.

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
AB 215 Chiu (D)	Housing Element		Adds the Housing Crisis Act of 2019 to specified provisions of the Planning and Zoning Law.	01/28/2021 - To ASSEMBLY Committee on HOUSING AND COMMUNITY DEVELOPMENT.
AB 221 Santiago (D)	Emergency Food Assistance		Requires the Department of Social Services to provide a food assistance benefit statewide to low-income California residents, regardless of their immigration status, upon the appropriation of funds by the Legislature for this purpose or a determination by	01/28/2021 - To ASSEMBLY Committee on HUMAN SERVICES.
AB 230 Voepel (R)	Employment: Flexible Work Schedules		Enacts the Workplace Flexibility Act of 2021. Permits an individual nonexempt employee to request an employee-selected flexible work schedule providing for workdays up to a certain number of hours per day within a 40-hour workweek, and would allow an empl	01/28/2021 - To ASSEMBLY Committee on LABOR AND EMPLOYMENT.
AB 236 Berman (D)	Campaign Contributions: Limited Liability Companies		Requires a committee to include within a campaign statement the name of each individual who owns or controls, or controls the contributions or expenditures of, a limited liability company or foreign limited liability company from which the committee recei	01/28/2021 - To ASSEMBLY Committee on ELECTIONS.
AB 237 Gray (D)	Public Employment: Unfair Practices: Health Protection		Makes it an unfair practice for a covered employer, as defined, to fail or refuse to maintain or pay for continued health care or other medical coverage for an enrolled employee or their enrolled dependents, for the duration of the enrolled employee's par	01/28/2021 - To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.
AB 241 Bonta (D)	Referendum Measures		Requires initiative and referendum measures to appear in the order in which they qualify for the ballot.	01/28/2021 - To ASSEMBLY Committee on ELECTIONS.
AB 244 Rubio (D)	Affordable Housing Cost Study: Housing Plan Addendum		Requires the California Tax Credit Allocation Committee, the Department of Housing and Community Development, the California Housing Finance Agency, and the California Debt Limit Allocation Committee to conduct an affordable housing cost study that measur	01/28/2021 - To ASSEMBLY Committee on HOUSING AND COMMUNITY DEVELOPMENT.

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
AB 252 Rivas R (D)	Department of Conservation: Incentive Program		Requires the Department of Conservation to establish and administer a program named the Multibenefit Land Repurposing Incentive Program for purposes of providing grants to groundwater sustainability agencies or counties, or other specified entities design	01/28/2021 - To ASSEMBLY Committee on WATER, PARKS AND WILDLIFE.
AB 255 Muratsuchi (D)	Tenancy: Commercial Leases: COVID-19 Rent Relief		States the intent of the Legislature to enact legislation that would provide commercial rent relief protections for small businesses affected by the COVID-19 pandemic to help them weather this public health and economic crisis without losing their busines	01/14/2021 - INTRODUCED.
AB 267 Valladares (R)	California Environmental Quality Act: Exemption		Extends the exemption from CEQA prescribed fire, thinning, or fuel reduction projects undertaken on federal lands to reduce the risk of high-severity wildfire that have been reviewed under the federal National Environmental Policy Act of 1969 and the requ	01/28/2021 - To ASSEMBLY Committee on NATURAL RESOURCES.
AB 271 Rivas R (D)	Santa Clara Valley Water District: Contracts: Value		Authorizes the Santa Clara Valley Water District, upon approval by the board of directors of the district, to award contracts on a best value basis for any work of the Anderson Dam project, defined to include prescribed activities and works of constructio	01/28/2021 - To ASSEMBLY Committee on LOCAL GOVERNMENT.
AB 280 Rivas R (D)	Electrical Corporations: Wildfire Mitigation Plans		Requires each electrical corporation to submit its annual wildfire mitigation plan to the appropriate policy committees of the Legislature.	01/28/2021 - To ASSEMBLY Committee on UTILITIES AND ENERGY.
AB 284 Rivas R (D)	Global Warming Solutions Act of 2006: Climate Goal		Requires the State Air Resources Board, when updating the scoping plan and in collaboration with the Natural Resources Agency and other relevant state agencies and departments, to take specified actions by a certain date, including, among others, identify	01/28/2021 - To ASSEMBLY Committee on NATURAL RESOURCES.
AB 297 Gallagher (R)	Fire Prevention		Appropriates certain amounts to the Department of Forestry and Fire Prevention and the California Conservation Corps,	01/25/2021 - INTRODUCED.

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
			respectively, for fire prevention activities. Exempts from the requirements of the California Environmental Quality Act (CEQA) projects o	
AB 304 Quirk (D)	Contaminated Sites: Waste Releases		Authorizes a person to request the local officer to oversee the remedial action only if the release of waste is not being overseen by the State Water Resources Control Board or a regional water quality control board.	01/25/2021 - INTRODUCED.
AB 315 Stone (D)	Voluntary Stream Restoration Landowner Liability		Requires the state to indemnify and hold harmless a landowner who voluntarily allows land to be used for such a project to restore fish and wildlife habitat from civil liability for property damage or personal injury resulting from the project if the proj	01/25/2021 - INTRODUCED.
AB 318 Levine (D)	Hazardous Waste: Classification: Exclusion: Green Waste		Excludes from classification as a hazardous waste green waste, as defined, that has not been contaminated by a chemical that the Department of Toxic Substances Control determines is hazardous or toxic during the production, harvest, or processing stage. R	01/26/2021 - INTRODUCED.
AB 319 Valladares (R)	Political Reform Act of 1974: Contributions		Makes make the contribution limits under the Political Reform Act of 1974 applicable to specified legal defense accounts. Prohibits a foreign government or principal, as defined, from making a contribution or expenditure in connection with an election of	01/26/2021 - INTRODUCED.
AB 322 Salas (D)	Energy: Electric Program Investment Charge Program		Requires the State Energy Resources Conservation and Development Commission to allocate not less than 20% of the funds appropriated for the Electric Program Investment Charge (EPIC) program to bioenergy projects for biomass conversion, as defined.	01/26/2021 - INTRODUCED.
AB 327 Kiley (R)	California Cybersecurity Integration Center		Add the California Privacy Protection Agency as one of the organizations whose representatives comprise the California	01/26/2021 - INTRODUCED.

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
			Cybersecurity Integration Center. Declare that its provisions further the purposes and intent of the California Privacy Rights Act of 20	
AB 336 Villapudua (D)	Enhanced Infrastructure Financing: Public Authority		Specifies that any member of the legislative body of a participating affected taxing entity who serves as a member of the public financing authority of an enhanced infrastructure financing district, as described, may also serve as a member of the governin	01/27/2021 - INTRODUCED.
AB 339 Lee (D)	State and Local Government: Open Meetings		Requires all meetings of the Legislature, including gatherings using teleconference technology, to include an opportunity for all persons to attend via a call-in option or an internet-based service option that provides closed captioning services and requi	01/28/2021 - INTRODUCED.
AB 343 Fong (R)	California Public Records Act Ombudsperson		Establishes, within the California State Auditor's Office, the California Public Records Act Ombudsperson. Requires the California State Auditor to appoint the Ombudsperson subject to certain requirements. Requires the Ombudsperson to receive and investig	01/28/2021 - INTRODUCED.
AB 345 Quirk-Silva (D)	Accessory Dwelling Units: Separate Conveyance		Requires each local agency to, by ordinance, allow an accessory dwelling unit to be sold or conveyed separately from the primary residence to a qualified buyer if certain conditions are met. The bill would remove the requirements that the property be held	01/28/2021 - INTRODUCED.
AB 346 Seyarto (R)	Privacy: Breach		Relates to the Information Practices Act which requires an agency, which includes a local agency, that owns or licenses computerized data that includes personal information to disclose expeditiously and without unreasonable delay a breach in the security	01/28/2021 - INTRODUCED.

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
ACA 1 Aguiar-Curry (D)	Local Government Financing: Affordable Housing		Creates an additional exception to the 1% ad valorem tax rate limit on real property that would authorize a city, county, or special district to levy an ad valorem tax to service bonded indebtedness incurred to fund the construction, reconstruction, rehab	12/07/2020 - INTRODUCED.
SB 1 Atkins (D)	Coastal Resources: Sea Level Rise		Includes, as part of the procedures the California Coastal Commission is required to adopt for local coastal programs, recommendations and guidelines for the identification, assessment, minimization, and mitigation of sea level rise within each local coas	01/28/2021 - To SENATE Committees on NATURAL RESOURCES AND WATER and ENVIRONMENTAL QUALITY and GOVERNMENTAL ORGANIZATION.;01/28/2021 - In SENATE. Rescinds referral to Committee on GOVERNMENTAL ORGANIZATION due to limitations concerning COVID-19 virus.
SB 3 Caballero (D)	Tenancy: COVID-19		Extends the covered time period and transition time period for purposes of the COVID-19 Tenant Relief Act of 2020 to a specified date.	01/28/2021 - To SENATE Committee on JUDICIARY.
SB 8 Skinner (D)	Density Bonus Law		Makes a nonsubstantive change to the definition of development standard for purposes of the Density Bonus Law.	01/28/2021 - To SENATE Committee on RULES.
SB 9 Atkins (D)	Housing Development: Approvals		Requires a proposed housing development containing two residential units within a single-family residential zone to be considered ministerially, without discretionary review or hearing, if the proposed housing development meets certain requirements that t	01/28/2021 - To SENATE Committees on HOUSING and GOVERNANCE AND FINANCE and ENVIRONMENTAL QUALITY.;01/28/2021 - In SENATE. Rescinds referral to Committee on ENVIRONMENTAL QUALITY due to limitations concerning COVID-19 virus.
SB 10 Wiener (D)	Planning and Zoning: Housing Development: Density		Authorizes a local government to pass an ordinance to zone any parcel for up to 10 units of residential density per parcel, at a	01/28/2021 - To SENATE Committees on HOUSING and GOVERNANCE AND FINANCE and

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
			height specified in the ordinance, if the parcel is located in a transit-rich area, a jobs-rich area, or an urban infill site,	ENVIRONMENTAL QUALITY.;01/28/2021 - In SENATE. Rescinds referral to Committee on ENVIRONMENTAL QUALITY due to limitations concerning COVID-19 virus.
SB 12 McGuire (D)	Local Government Planning and Zoning: Wildfires		Requires the safety element, upon the next revision of the housing element or the hazard mitigation plan, on or after a certain date, whichever occurs first, to be reviewed and updated as necessary to include a comprehensive retrofit strategy to reduce th	01/28/2021 - To SENATE Committees on GOVERNANCE AND FINANCE and HOUSING and NATURAL RESOURCES AND WATER.;01/28/2021 - In SENATE. Rescinds referral to Committee on NATURAL RESOURCES AND WATER due to limitations concerning COVID-19 virus.
SB 13 Dodd (D)	Local Agency Services: Contracts: Napa, San Bernardino		Imposes a deadline for the Napa and San Bernardino commissions to report to the Legislature on the pilot program, authorize a city or district to provide new or extended services outside its jurisdictional boundary, and would require the contents of that	01/28/2021 - To SENATE Committee on GOVERNANCE AND FINANCE.
SB 27 Skinner (D)	Carbon Sequestration: State Goals: Natural Working Land		Requires the Natural Resources Agency, no later than July 1, 2022, in coordination with the California Environmental Protection Agency, the State Air Resources Board, and the Department of Food and Agriculture, to establish carbon sequestration goals for	01/28/2021 - To SENATE Committees on ENVIRONMENTAL QUALITY and NATURAL RESOURCES AND WATER.
SB 29 Umberg (D)	Elections: Vote by Mail Ballots		Extends requirements to vote by mail ballots to all elections conducted prior to January 1, 2022.	01/28/2021 - In SENATE. Read third time, urgency clause adopted. Passed SENATE. *****To ASSEMBLY.
SB 33 Cortese (D)	California Environmental Quality Act: Lead Agency		Makes nonsubstantive changes to the California Environmental Quality Act.	01/28/2021 - To SENATE Committee on RULES.

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
SB 36 Skinner (D)	Energy Efficiency		Makes nonsubstantive changes to existing law which authorizes the State Energy Resources Conservation and Development Commission to prescribe, by regulation, energy efficiency standards, including appliance efficiency standards.	01/28/2021 - To SENATE Committee on RULES.
SB 37 Cortese (D)	Contaminated Sites Dominic Cortese Act of 2021		Updates and revitalizes the Hazardous Waste and Substances Sites List, or the Cortese List. Requires the Department of Toxic Substances Control to also list hazardous waste facilities where the department issued an order for corrective action after determ	12/07/2020 - INTRODUCED.
SB 45 Portantino (D)	Wildfire Prevention, Safe Drinking Water Bond Act		Enacts the Wildfire Prevention, Safe Drinking Water, Drought Preparation, and Flood Protection Bond Act of 2022, which, if approved by the voters, would authorize the issuance of bonds in a specified amount pursuant to the State General Obligation Bond La	01/28/2021 - To SENATE Committees on NATURAL RESOURCES AND WATER and GOVERNANCE AND FINANCE and ENVIRONMENTAL QUALITY.;01/28/2021 - In SENATE. Rescinds referral to Committee on ENVIRONMENTAL QUALITY due to limitations concerning COVID-19 virus.
SB 46 Stern (D)	Employment: Contact Tracing: COVID-19		States the intent of the Legislature to enact legislation that would require an employer to develop and implement contact tracing and safety policies for its employees, including requiring notice to the employer when an employee receives a positive Corona	01/28/2021 - To SENATE Committee on RULES.
SB 49 Umberg (D)	Business Fees: Reimbursement: Waiver: COVID-19		Expresses the intent of the Legislature to enact future legislation that would reimburse or waive state or locally mandated operating fees for businesses that are unable to operate due to statewide or local actions or ordinances instituted as a result of	01/28/2021 - To SENATE Committee on RULES.
SB 51 Durazo (D)	Surplus Residential Property: Sale: Los Angeles		Requires, with respect to surplus residential property that is located in the City of Los Angeles, that if the surplus residential property is not sold to a former owner or present occupant, the property be offered at fair market value to purchasers who a	01/19/2021 - To SENATE Committee on TRANSPORTATION.

IRWD 2021 LEGISLATIVE MATRIX
Updated 02/01/2021

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
SB 52 Dodd (D)	State of Emergency: Power Outages		Expands the definition of sudden and severe energy shortage to include a deenergization event, defined as a planned power outage, as specified, and would make a deenergization event one of those conditions constituting a state of emergency and a local eme	01/28/2021 - To SENATE Committee on GOVERNMENTAL ORGANIZATION.
SB 55 Stern (D)	Very High Fire Hazard Severity Zone: Development	SEEK AMENDMENTS	Prohibits the creation or approval of a new development, as defined, in a very high fire hazard severity zone or a state responsibility area.	12/07/2020 - INTRODUCED.
SB 63 Stern (D)	Fire Prevention: Vegetation Management: Education		Requires the Director of Forestry and Fire Protection to identify areas of the state as moderate and high fire hazard severity zones and requires a local agency to make this information available for public review and comment. Requires the director to est	01/28/2021 - To SENATE Committees on NATURAL RESOURCES AND WATER and HOUSING.
SB 67 Becker (D)	Clean Energy		States intent of the Legislature to enact subsequent legislation to accelerate the state's progress toward having all electricity provided by renewable or other zero-carbon sources on a permanent basis.	01/28/2021 - To SENATE Committee on RULES.
SB 68 Becker (D)	Building Decarbonization		States the intent of the Legislature to enact subsequent legislation that will help the state achieve its climate and air pollution reduction goals in the building sector through actions such as reducing barriers to upgrading electrical service panels or	01/28/2021 - To SENATE Committee on RULES.
SB 72 Rubio (D)	Residential Property Insurance: Wildfire Risk		Requires the Insurance Commissioner to transmit to the Secretary of the Natural Resources Agency a report that makes geographic recommendations for vegetation management projects based on the commissioner's analysis of specified information, including non	01/28/2021 - To SENATE Committee on RULES.
SB 77 Nielsen (R)	Elections: Ballots		Makes a technical, nonsubstantive change to provisions of existing law providing that, on election day, a voter who does not	01/28/2021 - To SENATE Committee on RULES.

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
			vote the ballot the voter has received shall, before leaving the polling place, return it to the precinct board member having char	
SB 79 Nielsen (R)	Fair Political Practices Commission		Makes technical, nonsubstantive changes to provisions of the Fair Political Practices Commission prohibiting members of the commission from holding certain offices and from participating in certain activities. Makes technical, nonsubstantive changes to pr	01/28/2021 - To SENATE Committee on RULES.
SB 83 Allen (D)	California Infrastructure and Economic Development Bank		Creates the Sea Level Rise Revolving Loan Program within the I-Bank to provide low-interest loans to local jurisdictions for the purchase of coastal properties in their jurisdictions identified as vulnerable coastal property. Requires the California Coast	01/28/2021 - To SENATE Committees on NATURAL RESOURCES AND WATER and GOVERNANCE AND FINANCE.
SB 89 Skinner (D)	Budget Act of 2020		Amends the Budget Act of 2020 (Chapters 6 and 7 of the Statutes of 2020) by adding Items 2240-002-0890 and 2240-102-0890 to, and amending Section 39.00 of, that act, relating to the state budget, and making an appropriation therefor.	01/29/2021 - Signed by GOVERNOR.;01/29/2021 - Chaptered by Secretary of State. Chapter No. 2021-001
SB 91 Budget and Fiscal Review Cmt	COVID-19 Relief: Tenancy: Federal Rental Assistance		Extends the imposition of additional damages, if a tenant has provided a declaration of COVID-19 financial distress, on a landlord who violates the prohibition from interrupting or terminating utility service furnished to a tenant with the intent to termi	01/29/2021 - Signed by GOVERNOR.;01/29/2021 - Chaptered by Secretary of State. Chapter No. 2021-002
SB 98 McGuire (D)	Public Peace: Media Access		Requires that specified media be allowed to enter specified closed areas and prohibits a peace officer or other law enforcement officer from intentionally assaulting, interfering with, or obstructing a duly authorized representative who is gathering, rece	01/28/2021 - To SENATE Committee on PUBLIC SAFETY.
SB 99 Dodd (D)	Community Energy Resilience Act of 2021		Requires the State Energy Resources Conservation and Development Commission to develop and implement a grant program for local governments to develop community energy	01/28/2021 - To SENATE Committee on ENERGY, UTILITIES AND COMMUNICATIONS.

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
			resilience plans. Sets forth guiding principles for plan development, including equitabl	
SB 105 Nielsen (R)	Online Voter Registration		Makes technical, nonsubstantive changes to provisions of existing law concerning online voter registrations.	01/28/2021 - To SENATE Committee on RULES.
SB 109 Dodd (D)	Office of Wildfire Technology Research and Development		Establishes the Office of Wildfire Technology Research and Development within the Office of Emergency Services under the direct control of the Director of the Office of Emergency Services. Makes the office responsible for studying, testing, and advising r	01/28/2021 - To SENATE Committee on GOVERNMENTAL ORGANIZATION.
SB 209 Dahle (R)	State of Emergency: Termination After 7 Days: Extension		Requires a state of emergency to terminate 7 days after the Governor's proclamation of the state of emergency unless the Legislature extends it by a concurrent resolution.	01/12/2021 - INTRODUCED.
SB 219 McGuire (D)	Property Tax: Delinquent Penalty Cost: Health Orders		Authorizes the auditor or the tax collector to cancel any penalty, costs, or other charges resulting from tax delinquency upon a finding that failure to make a timely payment is due to a documented hardship, as determined by the tax collector, arising fro	01/28/2021 - To SENATE Committee on GOVERNANCE AND FINANCE.
SB 222 Dodd (D)	Water Affordability Assistance Program		Establishes the Water Affordability Assistance Fund in the State Treasury to help provide water affordability assistance, for both drinking water and wastewater services, to low-income ratepayers and ratepayers experiencing economic hardship in California	01/28/2021 - To SENATE Committees on ENVIRONMENTAL QUALITY and ENERGY, UTILITIES AND COMMUNICATION and JUDICIARY.;01/28/2021 - In SENATE. Rescinds referral to Committee on JUDICIARY due to limitations concerning COVID-19 virus.
SB 223 Dodd (D)	Discontinuation of Residential Water Service		Revises the conditions under which urban and community water systems and very small community water systems are prohibited from discontinuing residential service for nonpayment. Prohibits	01/28/2021 - To SENATE Committees on ENERGY, UTILITIES AND COMMUNICATIONS and

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
			these systems from discontinuing residential service for nonpayment	ENVIRONMENTAL QUALITY and JUDICIARY.;01/28/2021 - In SENATE. Rescinds referral to Committee on JUDICIARY due to limitations concerning COVID-19 virus.
SB 239 Banking and Financial Institutions Cmt	Government Finance Surplus Investments		Requires bonds or interest bearing notes that are eligible for investment of surplus state funds to be on obligations that are issued by or fully guaranteed as to principal and interest by a federal agency of the United States or a United States governmen	01/21/2021 - INTRODUCED.
SB 241 Umberg (D)	Civil Discovery		Declares the intent of the Legislature to enact legislation that would streamline discovery processes in order to reduce costs to the courts and litigants.	01/21/2021 - INTRODUCED.
SB 259 Wilk (R)	Public Utilities Commission: Electrical Oversight		states the intent of the Legislature to enact legislation to strengthen the Public Utilities commission's oversight of electrical corporations' efforts to reduce their fire risk and use of deenergization events.	01/26/2021 - INTRODUCED.
SB 265 Borgeas (R)	Property Tax: Reassessment		Makes nonsubstantive changes to existing law which authorizes a county board of supervisors, by ordinance, to provide an assessee of taxable property, or a person liable for the taxes thereon, whose property was damaged or destroyed without that persons f	01/27/2021 - INTRODUCED.
SCA 1 Hertzberg (D)	Elections: Referenda		Requires that the ballot for a referendum measure provide that a Yes vote is in favor of the referendum and rejects the statute or part of the statute subject to the referendum, and a No vote is against the referendum and approves the statute or part of t	12/07/2020 - INTRODUCED.
SCR 5 Melendez (R)	State of emergency: COVID-19: Termination		Declares that the state of emergency proclaimed by the Governor on a specified date, is at an end, thereby terminating the	12/22/2020 - INTRODUCED.;12/22/2020 - To SENATE Committee on RULES.

Bill No. Author	Title	IRWD Position	Summary/Effects	Status
			emergency powers granted to the Governor as a result of that proclamation.	

An act to add Article 4.7 (commencing with Section 53759) to Chapter 4 of Part 1 of Division 2 of Title 5 of the Government Code, relating to local government.

THE PEOPLE OF THE STATE OF CALIFORNIA DO ENACT AS FOLLOWS:

SECTION 1. Article 4.7 (commencing with Section 53759) is added to Chapter 4 of Part 1 of Division 2 of Title 5 of the Government Code, to read:

Article 4.7. Legal Actions Challenging Revenue Measures for Water or Sewer Service

53759. (a) Any judicial action or proceeding to attack, review, set aside, void, or annul an ordinance, resolution, or motion adopting a fee or charge for water or sewer service, or modifying or amending an existing fee or charge for water or sewer service, shall be commenced within 120 days of the effective date of the ordinance, resolution, or motion.

(b) Any action under this section by a local agency or interested person shall be brought pursuant to Chapter 9 (commencing with Section 860) of Title 10 of Part 2 of the Code of Civil Procedure.

(c) This section does not apply to any fee or charge for water or sewer service for which another statute establishes a specific time and procedure for bringing a judicial action or proceeding to attack, review, set aside, void or annul a fee or charge of that type.

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LEGISLATIVE COUNSEL'S DIGEST

Bill No.
as introduced, _____ .
General Subject: Local government: water or sewer service: legal actions.

The Mitigation Fee Act authorizes a local agency to establish, increase, or impose a variety of fees, dedications, reservations, or other exactions for services, and in connection with the approval of a development project, as defined. Existing law prohibits a local agency from imposing fees for specified purposes, including fees for water or sewer connections, as defined, that exceed the estimated reasonable cost of providing the service for which the fee is charged, unless voter approval is obtained. Existing law provides that a local agency levying a new a water or sewer connection fee or increasing a fee must do so by ordinance or resolution.

Existing law requires, for specified fees, including water or sewer connection fees, any judicial action or proceeding to attack, review, set aside, void, or annul an ordinance, resolution, or motion adopting a new fee or service charge or modifying an existing fee or service charge to be commenced within 120 days of the effective date of the ordinance, resolution, or motion according to specified procedures for validation proceedings.

This bill would apply the same judicial action procedure and timelines, as stated above, to ordinances, resolutions, or motions adopting, modifying, or amending water or sewer service fees or charges, except as provided.

Vote: majority. Appropriation: no. Fiscal committee: no. State-mandated local program: no.

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