



RJA Management Services

August 5, 2021

Mr. David Stoldt
General Manager
MONTEREY PENINSULA WATER MANAGEMENT DISTRICT
5 Harris Court Building G
Monterey, CA 93940

Dear Mr. Stoldt,

RJA Management Services would like to express interest in assisting the Monterey Peninsula Water Management District Board of Directors in conducting a *Performance Evaluation* of the General Manager.

Over the years, I have assisted elected and appointed officials in establishing goals and objectives for top management and have facilitated chief executive officer performance evaluations for the cities of Imperial Beach, Pasadena, Pittsburg, San Pablo, Soledad and Solana Beach, and the Burbank, Glendale, Pasadena Airport Authority and Monterey County. At Monterey County, I am currently assisting the Board of Supervisors in evaluating six direct reports: the County Administrative Officer, County Council, Civil Rights Officer, Public Defender, Natividad Medical Center Chief Executive Officer, and the Water Resources Agency General Manager. In addition, I have provided management consulting services to East Bay MUD, the Santa Clara Valley Water District, San Francisco PUD, MWD of Southern California, Upper San Gabriel Valley Municipal Water District and the San Luis Rey Indian Water Authority, among others. The evaluation of city managers at the cities of Pittsburg, San Pablo and Solana Beach involved gathering performance data from both the City Council and those who report directly to the city manager.

To begin with I will review and build upon past Board of Director's General Manager Performance Evaluation processes. I then will meet with the Board of Directors to discuss performance evaluation criteria the Directors want to utilize prior to revising the current Performance Evaluation Instrument or drafting a new Instrument. Although RJA has Performance Evaluation Instruments on file, oftentimes Instruments need to be modified to ensure that what is being measured is relevant and meaningful to each organization. Wherever possible, I recommend that job related factors already evaluated should continue to be evaluated as benchmarks for demonstrating progress and/or professional growth. The Board of Directors will have the opportunity to review, edit and approve the Performance Evaluation Form. The approved Evaluation Form will allow the Board of Directors to rate various job related performance factors/competencies and submit written comments to support ratings, suggest areas for improvement, and recommend performance goals and objectives. RJA will develop, distribute, collect completed forms, and analyze and report findings. If so desired, this process could afford the General Manager an opportunity to complete a self-evaluation. All evaluators will have the opportunity to complete the Evaluation Form on line or email a hard copy directly to me for analysis and reporting.

A Confidential report will be prepared for the Board of Director's review, discussion and editing prior to presentation to the General Manager. The results will be aggregated to ensure confidentiality of the evaluators. Once the report is approved by the Board of Directors, I will facilitate a Closed Session discussion with the Board of Directors and the General Manager to review the report, discuss areas for improvement, and establish future goals and objectives. An assumption underpinning this process is that the Board of Directors clearly understand expectations and how both parties will work together to achieve the Board's ambitious goals. It has been our experience that, after discussing the Performance Evaluation Report with the employee, changes agreed upon by the evaluators and employee may need to be made to the Report. I will make whatever agreed upon revisions are required and submit a final Performance Evaluation Report for the District and employee's files.

The RJA proposal does not include individual meetings with each Board Member to gather performance information. However, it does include time to meet with the Board of Directors to present and discuss evaluation criteria and the evaluation instrument, process, timeline and final report. I may have to contact the Directors to clarify information submitted. Total cost for the engagement as proposed is \$17,027.50, including travel and clerical expenses. Attached is a Performance Evaluation task, cost and expense breakdown for your review. The estimated cost is based on no more than three trips to the Monterey Peninsula Water Management District. I do not anticipate the engagement exceeding 97.5 consultant and support staff hours. Tasks required beyond what is proposed would be billed at the hourly consulting rate of \$185. RJA is prepared to work with the Monterey Peninsula Water Management District in negotiating cost savings wherever possible.

I welcome the opportunity to be of assistance to the Board of Directors. My prior work facilitating performance evaluations, working knowledge of Monterey County, and recognized expertise in human resource management should be of value to the Board of Directors in this important endeavor. Please feel free to call me if you have any questions or need additional information.

Sincerely,



Dr. Richard L. Garcia
President

RLG:SB;jg

Attachment

Attachment
Monterey Peninsula Water Management District
General Manager Performance Evaluation Development and Administration
Task/Hours/Expenses

Task	Consultant Hours	Consultant Cost	Clerical Hours	Clerical Cost
1. Review previous performance evaluation forms and process.	1.5	\$277.50		\$0.00
2. Meet with Board Members to develop an improved performance evaluation form and approve the District's Evaluation process. (Includes 4 hrs. for travel)	8	\$1,480.00		\$0.00
3. Develop and administer evaluation forms, gather completed forms, enter responses, type written comments.	4	\$740.00	16	\$720.00
4. Analyze data, contact evaluators for clarification of the information, update information.	16	\$2,960.00	8	\$360.00
5. Develop draft report.	16	\$2,960.00	8	\$360.00
6. Meet with Board Members to discuss and revise report and recommendations. (Includes 4 hrs. for travel)	8	\$1,480.00		\$0.00
8. Meet with Board Members and General Manager to review the evaluation and facilitate a discussion about future goals and objectives. (Includes 4 hrs. for travel)	8	\$1,480.00		\$0.00
9. Finalize report for submittal to the Board of Directors and General Manager.	2	\$370.00	2	\$90.00
Total Hours	63.5		34	
Total Cost for Consultant Hours (\$185.00 per hour) and Clerical Hours (\$45.00 per hour)	\$11,747.50		\$1,530.00	
Plus Estimated Travel and Other Expenses for Task 1 through 9	\$3,750.00			
Total Estimated Combined Performance Evaluation Development and Administration Cost plus Expenses	\$17,027.50			