



2013 General Services  
Conference  
Re-calibrating Normal



April 3, 4 & 5, 2013  
Hyatt Vineyard Creek, Santa Rosa



**21<sup>st</sup> Century Architectural Programming – Process Analysis with Simulation**

21<sup>st</sup> Century Programming allows the owner to get the design and staffing right...from the start – when analyzing dynamic, end-to-end processes. Learn why this approach works better than traditional approaches. This workshop will describe discrete-event simulation and why it is such a powerful tool for planning, design and staffing new (and existing) facilities including hospitals, jails, warehouses and other projects. See the steps and examples of building a valid simulation model, which can also lead to process re-engineering. This transparent modeling can build trust between operating departments and those controlling the purse strings and staffing because everyone can test assumptions and see the results without ever building or operating the facility. This tool can also be used to seek and identify efficiencies that could be put in place in existing systems.



**Marty Miller** leads the design and development for all modeling services. He also leads and facilitates process mapping and data analysis. Marty is instrumental in helping organizations better understand and analyze existing systems, improve internal decision making, create real value and help implement changes to match service needs. He is a member of the Institute for Operations Research and the Management Sciences (INFORMS) and a Sustaining Patron of the Winter Simulation Conference.

**Budget/ISF Rate Structures**

Re-calibrate your financial structure to align with the new normal of doing business. Take the mystery out of Internal Service Funds to ensure cost recovery of your operations.



**Greg Bergman**, Ventura County, is the Deputy Director for the General Services Agency, Administrative Division, and has served in that position since December 2009. He served as the Fiscal Manager for GSA the preceding seven years. He received his B.S. from California State University, Fresno in 1995 and became a licensed Certified Public Accountant in October 1999.

Greg has gained extensive governmental, non-profit, and business accounting experience through senior accountant and management roles at a variety of companies. His experience includes financial statement audits, cash flow management strategies for small business, software implementations, GAAP and GASB compliance, and a high level understanding of Cost Plan Procedures for municipalities in the State of California.

## **Building Information Modeling**

This workshop demonstrates the current uses of Building Information Modeling (BIM) for managing capital projects. BIM is a three dimensional tool to visualize and evaluate the design as it is developed, which enhances coordination between disciplines and the stakeholders so they understand what they will get when it is built. The presentation will cover lessons learned from both the design and construction side and how to gain the maximum value for future projects. See visual demonstrations and case studies of OAC (Owner Architect Contractor) team collaboration, BIM protocol, level of detail design/construction parametric data, systems coordination, IT infrastructure protocol, programming, as-built models, strategies for integration with computerized maintenance management systems and turnover of information to the owners.



**David Kirn**, Associate DBIA, LEED AP, has over 35 years of experience in program, project and construction management of both private and public sector projects, including large bond-funded projects throughout the western United States. Dave is a Regional Executive for Kitchell and has served as the Program Director for the California Department of Corrections and Rehabilitation's \$7 billion capital program.

**Scott Root** is our senior expert on BIM. Because he did not like the traditional adversarial relationship between the design and construction sides, he made a conscious decision to jump from design to construction to bridge the gap between the two cultures. He has garnered great respect throughout the industry. Scott is a registered architect in seven states, LEED-Accredited Professional, and a member of both the AIA and National Council of Architectural Registration Boards.



**Mo Haidar**, LEED AP, is the BIM Manager for LBL and has over 10 years of professional project experience ranging from master planning to building and interior design using a variety of delivery methods including Design-Bid-Build, Design-Build, and Integrated Project Delivery. Mo is responsible for implementing BIM software and processes and is highly experienced in the multi dimension BIM environment.

## **Centralization vs. Decentralization**

The presentation will focus on two key areas:

First, various models of delivering services in terms of level of centralization, including Central Led models, will be defined along with pros, cons and potential goals of the various models and what components should be considered in selecting the correct model.

Second, establishing and implementing methods and tools to utilize in changing from one model to another will also be discussed.

**Grant Hunsicker** has spent time in both the private and public sectors with extensive experience in developing organizational structure and in managing change. As the Butte County General Services Director, Grant has been charged with developing and implementing proper business process for a wide range of functions including contracting / procurement as well as all aspects of real property asset management.

### **Construction Phase Cash Flow and Project Completion Forecasting**

Good capital outlay managers have always been expected to be able to forecast construction phase cash flow needs and project completion dates. In reality, both of these forecasts are difficult to produce because they contain numerous unknowns and variables that impact their accuracy and reliability. This presentation provides a new and simple approach to understanding and producing these forecasts with a reasonably high degree of accuracy.



**Chris Meyer** is the Director of Facilities, Planning and Construction Management for the California Department of Corrections and Rehabilitation, which operates the largest portfolio of State-owned facilities in California State government.

### **County Facilities Planning – The New Normal**

The realities of the post-Great Recession economy demand that local governments forge creative and collaborative partnerships that deliver mandated health and social services with less funding than ever before, that point these organizations toward a new, more effective government service delivery system. Learn how two different Counties are laying the groundwork for a new way of doing business, one in which Counties seek innovative new strategies for harnessing the business savvy of the private sector with the resources of local government to develop facilities for the Twenty-First Century.

- What the County of Sonoma learned from its recent strategic facility planning efforts, and what this means for the “new normal” going forward for better utilization of County real estate and facility resources. Findings and recommendations include co-location of related departments and divisions, balancing centralized and de-centralized services, better utilization of office space, and leveraging common facility resources.



County of Sonoma Administration Center circa 1960

- The County of Santa Clara's on-going effort to develop a Civic Center Master Plan through public-private partnerships, to promote the objectives of efficiency in government, the highest and best use of County-owned properties, revenue generation, and sustainability.



Former San Jose City Hall  
circa 1950



Santa Clara County Civic Center  
circa 1950



**David Barry**, Architect and LEED Accredited Professional, is a Capital Project Manager for the County of Santa Clara Facilities and Fleet Department, Capital Programs Division. Specializing in urban design, community planning, and sustainable architecture, David contributed to the implementation of the NASA Ames Research Park master plan in Mountain View, California for AECOM/DMJM before serving as an urban designer for the former San Jose Redevelopment Agency.



**Mark Hummel**, Architect and LEED Accredited Professional, is Associate Architect for Planning in the Facilities Development and Management Division of the Sonoma County General Services Department. Mark oversees advance planning for the County's general government facilities and campuses, including development of the county's five-year Capital Project Plan. His past work includes retail facility network planning for overseas markets, and Cal State University and Community College master plan development.

### **Customer Expectations: Meeting Diverse Needs – Does One Service Delivery Model Meet All?**

What do customers really want? Why do departments want to do a project? Why does the project scope keep changing? When should the project be scheduled? Inquiring project managers want to know! This dynamic panel from a cross-section of diverse departments talks about projects from a customer perspective.

**Jennifer Murray**, DPA, has over 31 years experience working in local government at the city and county levels. She has been a Deputy County Administrator in Sonoma County for over 7 years, working extensively with the County's criminal justice system partners, Health and Human Services Departments, and in Capital Projects Planning.



**Assistant Sheriff Randall Walker** is a 21-year veteran of the Sonoma County Sheriff's Office, beginning in 1991 as a Correctional Officer, holding various assignments within the Detention Division. He promoted to Sergeant in 1996 and supervised several programs including the Mental Health and Facility Training Programs. After Randall's promotion to Lieutenant in 2001, he oversaw numerous teams and played an integral role in developing the Detention Division's Crisis Negotiations Team, the first of its kind in California. He promoted again to the rank of Captain in 2007, responsible for operations in the Main Adult Detention Facility and the North County Detention Facility. Randall's work at both detention facilities, on all shifts, combined with his extensive experience of being a team member, leader and manager, led to his selection as Detention Division Assistant Sheriff.



**Rita Scardaci, R.N., B.S.N., M.P.H.**  
**Director**  
**County of Sonoma, Department of Health Services**

Born in San Francisco, Ms. Scardaci grew up in Marin County. She received her R.N. from St. Francis Hospital School of Nursing San Francisco, a B.S.N./PHN from California State University, Sacramento, and an M.P.H. from San Jose State University.

She is a founding board member of the California State Rural Health Association and the Northern Sierra Rural Health Network. Ms. Scardaci has served as the Assistant Chief of Public Health for Santa Cruz County, Director of the Gerontology Program at Cabrillo College, and as an Instructor at the University of California, Santa Cruz, and San Jose State University. She served as Plumas County Director of Health Services for 13 years successfully bringing new federal and state health funding to the northern portion of the state. Ms. Scardaci served as a member of The California Endowment's Board of Directors from April 2002-2011.

Ms. Scardaci has extensive experience in both rural and urban California, and gained a holistic view of community, uniting the public and private sectors and on the collective goal of healthy communities. She believes that creating and sustaining healthy communities is dependent on collaborative networks of many dedicated individuals and organizations.

In January 2005 she began serving as Sonoma County Director of Health Services, including serving as the Director of the Coastal Valley Emergency Medical Services Agency. The Department of Health Services brings together Public Health, Behavioral Health, Health, Policy and Evaluation and Administrative Services. Major projects include development and implementation of the County Medical Services Program (CMSP), Sonoma County Children and Families Commission Strategic Plan, a 10 year Ambulance Franchise Agreement, Health Action, Mental Health Service Act implementation and the successful expansion of Medi-Cal Managed Care. Ms. Scardaci serves on the board of PartnershipHealth Plan of California, chair of Sonoma County Health Alliance and First Five of Sonoma County.



**Jose Obregon**, Director of Sonoma County General Services, has over 30 years of experience in public service. José started with the City of Corpus Christi, TX. In California he worked for the City of San José for approximately ten years and has been with the County of Sonoma for five years. José's public service experience is diverse serving as Deputy Director and/or Director in the fields of traffic and transportation, public works, water services, airport development and internal support services. He has managed a variety of operational and capital programs and has led several organizational development efforts in the areas of strategic planning and performance based budgeting and reporting.

## **E-Procurement – Advantages, Disadvantages and Lessons Learned**

This is a web-based training on eProcurement and what to expect if/when your agency decides to implement a solution. This presentation will cover:

- Definition of eProcurement
- eProcurement's Proliferation
- Advantages
- Disadvantages
- Lessons Learned
- Q&A



**Craig Rader, CPPB, CPPO**, is Purchasing Agent for Sacramento County and has over 25 years' experience in procurement including both the Public and Private sectors. Craig is a Certified Public Purchasing Officer (CPPO) and Certified Professional Public Buyer (CPPB), has an AA degree in Purchasing and Materials Management and two Purchasing Certificates. He is an active member of several procurement associations and was recently elected as Secretary/Treasurer on the Board of the California Association of Public Procurement Officials (CAPPO).

## **EV Readiness for Your County Fleet**

- Overview of Sonoma County's experience
- Roadblocks to implementation
- Sonoma County guidelines
- Current State developments



**Dave Head** has been involved in vehicle and equipment management and repair for over 40 years. His work history includes training and work as an automotive mechanic, heavy equipment mechanic, parts sales person, owner/operator of an automotive repair facility, Fleet Supervisor and Fleet Manager. He has been the Fleet Manager at the County of Sonoma since December 1990.

Dave oversees a fleet of 1,450 vehicles and equipment, and he manages an annual operations budget of \$6.5 million and a \$3 million budget for vehicle replacement. The County has three maintenance facilities and a total staff of 21 positions.

The County fleet is listed as one of the 100 Best Government Fleets in North America, Top 100 Green Fleets in America, is designated as a Bay Area Green Business and has received the Model Pollution Prevention Repair Facility certificate from the Department of Toxic Substance Control and the Green

Station Recognition certificate from the Bureau of Automotive Repair. The County has one of the largest hybrid and electric vehicle fleet in the United States.

### **CSAC Legislative Update**

An update on the year's legislation focusing on realignment, the state budget, energy programs, prison population reduction, court construction updates and the opportunity to ask questions about other legislative issues impacting local government infrastructure and strategic support services.

**Geoff Neill** and **Faith Conley** are Legislative Analysts with the California State Association of Counties (CSAC).

### **Mastering the Hand-off**

This highly interactive discussion addresses the challenges and best practices for mastering that all-important transition from a capital project to an operating facility

- The presentation will use survey results from CCAEA and CCFSA members including
  - What are the challenges facing building operators and project managers
  - Best Practices and tips for managing expectations for all of the constituents of a project
  - Upcoming trends and challenges
- The presentation will use a Placer County case study from both the Capital Improvements and Building Maintenance perspectives

The Placer County team consists of:

**Joel Swift**, AIA, LEED AP, CCAEA President, Deputy Director of Facility Services, has responsibility for both the delivery and maintenance of county facilities.

**Rob Unholz**, CCAEA Vice President, Capital Improvements Manager,. Rob has managed and delivered the Placer County Capital Improvements program for over two decades. Rob has overseen a team of architects and project managers that have successfully completed projects up to \$100 million, for a total amount

**Dennis Salter**, Building Maintenance Superintendent, is responsible for the operations, custodial and utilities for county facilities. Dennis has a unique background, having worked as an architect, a contractor and project manager for

the capital improvements program. His organization has seen a substantial reduction in workforce while also taking on more complex buildings.

## **Performance Measurement ICMA Center for Performance Measurement**



**Michael Brown** is the Government Affairs Director of the Coalition of Labor, Agriculture, and Business of both San Luis Obispo and Santa Barbara Counties. The two COLABs are separate nonpartisan, non-profit government watchdogs and advocates representing farmers, ranchers, vineyards, developers, professional firms, contractors, and publicly spirited citizens who oppose increased government regulation, fees, and taxes.

He is a graduate of the California State University at Northridge, BA in Government, and the University of Texas at Austin, MA in Public Administration. He went on to a 42 year career in local government management including service as Deputy City Manager of Hartford, Connecticut, Chief Deputy Commissioner of the Connecticut State Department of Housing, City Manager of Berkeley, City Manager of Tucson and, most recently, County Executive Officer for Santa Barbara County, from which he retired after 14 years. He is a Credentialed Manager of the International City/County Management Association (ICMA) and has pursued further training over his career at the University Of Arizona Eller College Of Management, The UC Berkeley Goldman School of Public Policy, The NYU Real Estate Institute, and the Yale School of Management.

Examples of his many awards include the ICMA Distinguished Budget Award (14 years consecutive in Santa Barbara County); The American Society For Public Administration Award for Teaching and Implementing Performance Measurement (2004); an Honorary Doctorate in Public Administration from the Tucson University (1996); four time winner of the ICMA Center For Performance Management Award For Use of Performance Measures, and a Carnegie-Mellon University Award for Innovative Use of Information Technology. He was selected by his peers to serve as Chairman of ICMA's Center for Performance Management for over a decade and to be a member of the National Advisory Commission on Performance Management.

Brown is an advocate (and former practitioner) of governments using structured management systems, which include performance measurement, process improvement, structured project management, performance budgeting, and performance-based compensation.

## **Process Trumps Paper: How Ventura County is Automating Processes and Moving to Digital Services**

With a focus on process (and not paper) the GSA Business Support group has deployed ECM and eForm tools to diversify its revenue and product stream across a variety of digital services. By automating processes and building workflows, the group is saving the county significant tax dollars and improving employee productivity. Move beyond print and make it flow.



**Steve Nelles** is the manager of Document Services for the County of Ventura, supporting 9,000 employees and a diverse collection of government agencies including healthcare, public safety and IT services. He continues to evolve a traditional In-plant based on large print volume to one focused on business process and document management services to deliver content across both physical and electronic channels.

### **Using Sustainability as a Lens to Position Local Government for the 21<sup>st</sup> Century**

We are all facing new demands – reduced budgets, the need to respond to today’s environmental challenges and community needs, and a new generation of government workers who expect flexibility. This presentation highlights the approach being used by Alameda County to reduce facilities operating costs while establishing infrastructure to support 21<sup>st</sup> century workers – it will focus on how Alameda County’s cross-agency climate action efforts are intersecting with alternative work arrangement efforts. The presentation will highlight a project to relocate two county agencies while helping them shift to alternative work arrangements.

The Alameda County team consists of:



**Carolyn Bloede**, Sustainability Program Manager since 2003, leads her team in reducing the County’s ecological footprint by implementing results-driven sustainability programs, developing policies, building regional partnerships and influencing legislation. Carolyn and her team have been leading an unprecedented cross-agency effort engaging 50 staff from 14 agencies on teams to take concrete climate action and achieve efficiencies.



**David Barba**, Systems Analyst for GSA Communications, is an experienced telecommunications specialist focusing on delivering voice and messaging services to Alameda County’s 9,000 employees. Dave is playing a key role in leading the selection and implementation of the telecommunications technologies that will be critical in the success of projects to consolidate agencies and enhance mobility options for communications.



**Isabelle Beauchamps**, Real Estate Projects Manager, is highly experienced in managing all aspects of the County's 975,000 square feet leased property portfolio, including site search and selection, transactional negotiations, space programming and planning, tenant improvements and systems furniture planning and acquisition. She plays an instrumental role in space planning projects and works with agencies to streamline their processes, identifying job tasks eligible for alternative work solutions, and developing furniture layouts and space plans that balance client work requirements with the County's climate action efforts.

### **Recalibrated for Realignment**

The shift of inmates from state prisons to county jails created serious impacts at the local level. This panel, consisting of an interdisciplinary team from Probation, the Sheriff's Office and General Services, discusses realignment issues, the Criminal Justice Master Plan and Sonoma County's strategy for dealing with the impacts of realignment.



**Robert Ochs** has been the Sonoma County Chief Probation Officer for the past 7 years, following 4 years as Deputy Chief. He was born and raised in Los Angeles, and has a non-typical background for a Chief Probation Officer. He has been a licensed clinician since 1983, and began working in the field of juvenile delinquency at the California Youth Authority. Bob moved into residential treatment, started a private practice, and taught. Much of his work in psychology was in forensic mental health – evaluating insanity acquittees, mentally-disordered offenders, and sex-offenders, making recommendations for appropriateness of hospital release, testifying in court; then directing a Community Corrections Center for these offenders. His last position before moving to Sonoma County was as director of the Adult Division of a large Community Mental Health Center in Los Angeles



**Steve Freitas**, Sheriff-Coroner, is a 28-year veteran of Law Enforcement, beginning in 1985 with the Santa Clara County Sheriff's Office. He has worked at the Sonoma County Sheriff's Office for 22 years. Steve has worked a myriad of assignments including Detention, Courts, Patrol, Investigations and Administration. In 2010, he was elected Sheriff-Coroner for the County of Sonoma and assumed the position on January 3, 2011.



**Wayne Hovey**, NCARB Architect, is the Acting County Architect for the County of Sonoma and head of the Facilities Development and Management Division of General Services. Wayne has been with the County for over 21 years filling many roles from Project Manager to Associate Architect. He has been responsible for a full range of projects, from planning projects to the design and construction of some of the County's major facilities, including the Sonoma County Sheriff Building and the Juvenile Justice Center.

### **Recalibrating Your Partnership with HR**

Strong working relationships with your Human Resources Department are critical to successfully implementing the new normal. This informative session will cover:

- Succession planning (in a Civil Service environment!)
- Planning and expediting successful recruitments
- Managing and motivating survivors of layoffs, re-orgs, and budget cuts
- Innovative recognition and reward programs



**John Nicoll's** career in City and County Government spanned 34 years as Management Services Director in the City of Burbank and as Assistant County Executive in Ventura County. His experience in finance, budget, human resources and his role as Chief Negotiator for three decades provides a view to understanding the history, practices principles and challenges of effective, adaptable management in Civil Service/Collective Bargaining environments.

As a graduate instructor since the early 1990's, he has received academic awards including Outstanding Professor of the Year, from the Graduate Public Administration Community at USC in 2000 and the Scoville Award for Academic Excellence from the Los Angeles Chapter of American Society for Public Administration in 2008. In 2009, he received recognition from the State Senate for his work at California State University Northridge. He has provided training and presentations for the California Debt and Investment and Advisory Commission, The National League of Cities, California State Association of Counties and the Southern California Personnel Management Association.

### **Sonoma Mountain Village Tour and Dinner 1100 Valley House Drive, Rohnert Park**

Tour the award-winning, deeply sustainable mixed-use community that combines the age-old idea of designing for people and business with cutting-edge sustainability. As the first community in North America endorsed by the prestigious international One Place Communities Program, SOMO Living is a high performance replicable model that is set to prove that we can address our planet's biggest environmental concerns and live well It's sustainable living and leasing in a community designed to care for its residents,

businesses, visitors and the planet – all without compromising our richly deserved quality of life.

Dinner follows at Sally Tomatoes, known for using old world tradition with their handcrafted sauces and slow-roasted meats. Dishes feature products from local farmers, merchants and artisans.

**Geof Syphers**, PE, LEED-AP, Chief Sustainability Officer, leads Codding Investment’s environmental stewardship of water, energy, resources and habitat. He is responsible for creating methods of aligning business interests with environmental goals and spearheads the green building certification programs at Sonoma Mountain Village.

### **Trifecta! Sustainability cuts costs, creates jobs, and reduces pollution**

Sure, energy projects are sexy, but what’s the real world evidence of their effectiveness? This presentation will provide a big picture overview of Sonoma County’s sustainability story, the business/financial case for taking action, and a tour of the most innovative actions happening in local governments.



**Sam Ruark** is the Energy & Sustainability Coordinator for the County of Sonoma where he facilitates energy efficiency and renewable energy projects for municipalities, non-profits, special districts, and small businesses. He has worked in the field of sustainability for non-profits, small business and local governments for 14 years. He previously served as a Sustainability Planner for Marin County and is LEED Accredited.

### **Veterans Buildings – A New Management Model**

This is an overview of the County of Sonoma’s decision to outsource the management of the Veterans Memorial Buildings. The overview will include an explanation of the transition process and the successes and challenges met along the way. A panel of the third party operators will be available to discuss the transition and to address any questions.



**Marissa Montenegro**, CPPB, CPPO, is a Department Analyst for the County of Sonoma General Services Department managing the Veterans Memorial Building 3<sup>rd</sup> party management agreements. Prior to working for the County of Sonoma, Marissa was a Contract Administrator for the US Air Force and has over 12 years experience in contracts and procurement in both local and federal government. Marissa is a Certified Public Purchasing Officer (CPPO) and Certified Professional Public Buyer (CPPB), and has a BS degree in Economics.



**Mike Carr** is the President/CEO of United Camps, Conferences and Retreats and has been with UCCR since 1998. For over 40 years United Camps, Conferences and Retreats has managed and operated, conference centers, retreats, and organized camps throughout California. The level of service includes food service, maintenance, customer service, drinking water systems, septic, light construction, natural resource management, and all aspects of administration including finance/accounting, reservations, marketing, and human resources.



**Linda Galetta**, Executive Director, Sebastopol Center for the Arts, received her BA, from the University of California, Berkeley and attended the U. S. Chamber of Commerce, Institute for Organization Management at Stanford University. She has served as Co-chair for the Sebastopol Apple Blossom Festival. Affiliations include City of Sebastopol Business Outreach Committee, Sebastopol Community Concert Association, Sonoma County Family YMCA and National Association of Membership Directors



**Jynx E. Lopez** is the Executive Director of River to Coast Children's Services (RCCS), which is a non-profit agency serving children and families in western Sonoma County. Prior to working for RCCS she owned and directed four state funded preschools. She has her Master's degree in Education with an emphasis in Early Childhood Education. Jynx has lived in Sonoma County for 25 years and is aware of the community and their needs.



**David Cameron** is a Program manager with River to Coast Children's Services. He was hired to manage the Guerneville Veterans Hall on behalf of RCCS. Prior to working for the agency, David managed a resort in Guerneville and rejuvenated the business through capital improvements and realigned management and marketing practices.

**What are our options? Brainstorming at our best using KJ (and we don't mean Kendall Jackson!)**

"Recalibrating Normal" presents a perfect opportunity to utilize the Affinity/KJ (Dr. Kawakita Jiro) Analysis Tool. This will be an interactive session demonstrating a team tool that gathers large amount of language data (ideas, opinions, issues) and organizes them into groupings based on their natural relationships. This is an extremely valuable and engaging process to use when there are large volumes of data related to an issue and there is a need to encourage new patterns of thinking. An Affinity/KJ diagram is

created based on the brainstorm input from a group of people very knowledgeable about the issue at hand. The process creates an open, structured forum to collect, “affinitize,” and meld the perspectives, opinions, and insights of a group of people who hold expertise about the concepts and issues.



**Liz Yager** is Sonoma County’s Energy and Sustainability Program Manager. Before joining the County, she not only enjoyed a career as a golf pro, but also 18 years in the high tech industry of Silicon Valley working in the areas of Information Technology (IT), scientific instrumentation and process engineering. Liz is passionate about continuous process improvement, lifelong learning and the importance of equity in a sustainable future.