



HEALTH SERVICES AGENCY
ADMINISTRATION

COUNTY OF SANTA CRUZ

0353

HEALTH SERVICES AGENCY

P.O. BOX 962, 1080 EMELINE AVENUE
SANTA CRUZ, CA 95061
(408) 454-4066 FAX: (408) 454-4770
TDD: (408) 454-4123

December 27, 1999

AGENDA: January 11, 2000

BOARD OF SUPERVISORS

County of Santa Cruz
701 Ocean Street
Santa Cruz, CA 95060

RE: Approval of Agreement for Customer Service Training

Dear Board Members:

On May 4, 1999, your Board accepted the report of the Environmental Health Task Force that had been convened under authorization of the Board to review the County's Sewage Disposal Program, and make recommendations for improvements. Your Board adopted a series of recommendations made by the Task Force.

One of the recommendations was that the Health Services Agency design a training program to provide staff with a public service orientation, developing them as experts whose role is to help train and educate the public as to the proper functioning of septic systems, as well as to protect the public health and environment.

In November, 1999, thirty-six staff of the Public Health Division, including twenty Environmental Health staff, attended a set of two-day workshops on customer service and team building under an agreement with Management Action Program (MAP). It is proposed that HSA now provide the same workshops to the remaining Environmental Health Services staff under an agreement hereby submitted to your Board for authorization. Funding for the training is provided in the approved Environmental Health Services budget for 1999/2000.

COUNTY OF SANTA CRUZ
REQUEST FOR APPROVAL OF AGREEMENT

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TO: Board of Supervisors
County Administrative Officer
County Counsel
Auditor-Controller

FROM: Health Services Agency (Dept.)
R. Khalil (Signature) 12/26/99 (Date)

The Board of Supervisors is hereby requested to approve the attached agreement and authorize the execution of the same.

1. Said agreement is between the Health Services Agency (Agency) 94588
and Management Action Program; 5820 Stoneridge Mall Rd., Ste. 100, Pleasanton, CA (Name & Address)

2. The agreement will provide two full-day skill development workshops for Environmental h
staff using the MAP method.

3. The agreement is needed to provide public service training for staff, as required by
Board of Supervisors adoption of Env. Health Task Force recommendation.

4. Period of the agreement is from January 11, 2000 to June 30, 2000

5. Anticipated cost is \$ 525.00 /participant, not to exceed \$10, 500.00 (Fixed amount; Monthly rate; Not to exceed)

6. Remarks: _____

7. Appropriations are budgeted in 362860 (Index#) 3665 (Subobject)

NOTE: IF APPROPRIATIONS ARE INSUFFICIENT, ATTACH COMPLETED FORM AUD-74

Appropriations are available and have been encumbered. Contract No. C092005 Date 12/28/99
are not will be

GARY A. KNUTSON, Auditor - Controller
By Ronald J. Silva Deputy.

Proposal reviewed and approved. It is recommended that the Board of Supervisors approve the agreement and authorize the
to execute the same on behalf of the _____

_____ (Agency) _____ County Administrative Officer

Remarks: _____
GH (Analyst) By [Signature] Date 12/28/99

Agreement approved as to form. Date _____

- Distribution:
- Bd. of Supv. - White
- Auditor-Controller - Blue
- County Counsel - Green *
- Co. Admin. Officer - Canary
- Auditor-Controller - Pink
- Originating Dept. - Goldenrod

*To Orig. Dept. if rejected.

State of California)
County of Santa Cruz) ss
_____ ex-officio Clerk of the Board of Supervisors of the County of Santa Cruz,
State of California, do hereby certify that the foregoing request for approval of agreement was approved by
said Board of Supervisors as recommended by the County Administrative Officer by an order duly entered
in the minutes of said Board on _____ County Administrative Officer
_____ 19 _____ By _____ Deputy Clerk

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Contract No:
Account: 362860
Subject: 3665

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SANTA CRUZ COUNTY HEALTH SERVICES AGENCY
INDEPENDENT CONTRACTOR AGREEMENT

THIS CONTRACT is entered into this 11th day of January, 2000, by and between the COUNTY OF SANTA CRUZ, hereinafter called COUNTY, and Management Action Program (MAP), hereinafter called CONTRACTOR. The parties agree as follows:

1. DUTIES. CONTRACTOR agrees to exercise special skill to accomplish the following result: prepare and provide two full-day skills development workshops using the MAP method for Environmental Health staff as detailed in Attachment A ("Scope of Work"), which by this reference is made part of this agreement.

2. COMPENSATION. In consideration for CONTRACTOR accomplishing said result, COUNTY agrees to pay CONTRACTOR as follows: **a rate of \$525.00 per each workshop attendee.** Compensation includes all per diem and private mileage required to provide the result required under this agreement. CONTRACTOR shall invoice on the form and in the manner required by County.

3. TERM. The term of this contract shall be: from January 11, 2000 to June 30, 2000 unless terminated in accordance with Paragraph 4.

4. EARLY TERMINATION. Either party hereto may terminate this contract at any time by giving thirty (30) days written notice to the other party.

5. INDEMNIFICATION FOR DAMAGES, TAXES AND CONTRIBUTIONS. CONTRACTOR shall exonerate, indemnify, defend, and hold harmless COUNTY (which for the purpose of paragraphs 5 and 6 shall include, without limitation, its officers, agents, employees and volunteers) from and against:

a. Any and all claims, losses, damages, defense costs, or liability of any kind or nature which COUNTY may sustain or incur or which may be imposed upon them for injury to or death of persons, or damage to property as a result of, arising out of, or in any manner connected with the CONTRACTOR's performance under the terms of this agreement, excepting any liability arising out of the sole negligence of the COUNTY. Such indemnification includes any damage to the person(s), or property (ies) of CONTRACTOR and third persons.

b. Any and all Federal, State, and Local taxes, charges, fees, or contributions required to be paid with respect to CONTRACTOR and CONTRACTOR's officers, employees and agents engaged in the performance of this Agreement (including, without limitation, unemployment insurance, social security and payroll tax withholding).

6. INSURANCE. CONTRACTOR, at its sole cost and expense, and for the full term of this Agreement (and any extensions thereof), shall obtain and maintain at minimum all of the following insurance coverage(s) and requirements. Such insurance coverage shall be primary coverage as respects COUNTY and any insurance or self-insurance maintained by COUNTY shall be excess of CONTRACTOR's insurance coverage and shall not contribute to it.

If CONTRACTOR utilizes one or more subcontractors in the performance of this Agreement, CONTRACTOR shall obtain and maintain Independent Contractor's Insurance as to each subcontractor or otherwise provide evidence of insurance coverage for each subcontractor equivalent to that required of CONTRACTOR in this Agreement, unless CONTRACTOR and COUNTY both initial here _____/_____.

a. Types of Insurance and Minimum Limits

1. Workers Compensation in the minimum statutorily required coverage amounts. This insurance coverage shall not be required if CONTRACTOR has no employees and certifies to this fact by initialing here _____

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(2) CONTRACTOR represents to COUNTY that it does not own, operate or utilize a business vehicle; but rather that a personal vehicle will be used only incidentally in traveling to and from one principal COUNTY facility in accomplishing the result required under this Agreement. In reliance on said representation, COUNTY waives any and all requirements relating to Automobile Liability Insurance.

3. CONTRACTOR represents to COUNTY that it will accomplish the result required by this contract by manner and means which will expose no person to reasonably foreseeable risk of personal injury or property damage, namely as follows: provide staff training workshops. In reliance thereon, COUNTY hereby waives the requirement for Comprehensive or Commercial General Liability Insurance.

b. Other Insurance Provisions

1. If any insurance coverage required in this Agreement is provided on a "Claims Made" rather than "Occurrence" form, CONTRACTOR agrees to maintain the required coverage for a period of three (3) years after the expiration of this Agreement (hereinafter "post agreement coverage") and any extensions thereof. CONTRACTOR may maintain the required post agreement coverage by renewal or purchase of prior acts or tail coverage. This provision is contingent upon post agreement coverage being both available and reasonable affordable in relation to the coverage provided during the term of this Agreement. For purposes of interpreting this requirement, a cost not exceeding 100% of the last annual policy premium during the term of this Agreement in order to purchase prior acts or tail coverage for post agreement coverage shall be deemed reasonable.

2. CONTRACTOR hereby covenants and represents that it will notify COUNTY in writing at least thirty (30) days prior to cancellation or non-renewal of any insurance coverage required herein.

3. CONTRACTOR agrees to provide COUNTY, at or before the effective date of this Contract, with a copy of the face page of any required insurance coverage in force on the effective date of this Contract and any new or renewal policies effective during the term of the Contract.

4. Any required notification or copies of documents shall be sent to: Health Services Agency, County of Santa Cruz, 1080 Emeline Ave., P.O. Box 962, Santa Cruz, CA 95061-0962, ATTN: HSA Purchasing/Claims.

7. EQUAL EMPLOYMENT OPPORTUNITY. During and in relation to the performance of this Agreement, CONTRACTOR agrees as follows:

a. CONTRACTOR will not discriminate against any employee or applicant for employment because of race, color, religion, national origin, ancestry, disability, physical or mental disability, medical condition (cancer related), marital status, sex, sexual orientation, age (over 18), veteran status, gender, pregnancy, or any other non-merit factor unrelated to job duties. Such action shall include, but not be limited to the following: recruitment; advertising; layoff or termination; rates of pay or other forms of compensation, and selection for training (including apprenticeship), employment, upgrading, demotion, or transfer. CONTRACTOR agrees to post in conspicuous places available to employees and applicants for employment, notice setting forth the provisions of this non-discrimination clause.

8. NONASSIGNMENT OF AGREEMENT. CONTRACTOR shall not assign this Agreement to a third party without the written consent of COUNTY. Any assignment without such written consent shall automatically terminate this Agreement.

9. PRESENTATION OF CLAIMS. Presentation and processing of any or all claims arising out of or related to this Agreement shall be made in accordance with the provisions contained in Chapter 1.05 of the Santa Cruz County Code, which by this reference is incorporated herein.

10. RETENTION AND AUDIT OF RECORDS. CONTRACTOR shall retain records pertinent to this Agreement for a period of not less than five (5) years after final payment under this Agreement or until a final audit report is accepted by COUNTY, whichever occurs first. CONTRACTOR hereby agrees to be subject to the examination and audit by the Santa Cruz County Auditor-Controller, the Auditor General of the State of California, or the designee of either for a period of five (5) years after final payment under this Agreement.

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11. INDEPENDENT CONTRACTOR STATUS FACTORS. CONTRACTOR and COUNTY have reviewed and considered the principal test and secondary factors below and agree that CONTRACTOR is an independent contractor and not an employee of COUNTY. CONTRACTOR is responsible for all insurance (worker's compensation, unemployment, etc.) and all payroll related taxes. CONTRACTOR is not entitled to any employee benefits. COUNTY agrees that CONTRACTOR shall have the right to control the manner and means of accomplishing the result contracted for herein.

PRINCIPAL TEST: The CONTRACTOR rather than COUNTY has the right to control the manner and means of accomplishing the result contracted for.

SECONDARY: (a) The extent of control which, by agreement, COUNTY may exercise over the details of the work is slight rather than substantial; (b) CONTRACTOR is engaged in a distinct occupation or business; (c) in the locality, the work to be done by CONTRACTOR is usually done by a specialist without supervision, rather than under the direction of an employer; (d) the skill required in the particular occupation is substantial rather than slight; (e) the CONTRACTOR rather than the COUNTY supplies the instrumentalities, tools and workplace; (f) the length of time for which CONTRACTOR is engaged is of limited duration rather than indefinite; (g) the method of payment of CONTRACTOR is by the job rather than by the time; (h) the work is part of a special or permissive activity, program or project, rather than part of the regular business of COUNTY; (i) CONTRACTOR and COUNTY believe they are creating an independent relationship rather than an employer-employee relationship; and (j) the COUNTY conducts public business.

It is recognized that it is not necessary that all secondary factors support creation of an independent contractor relationship, but rather that overall there are significant secondary factors which indicate that CONTRACTOR is an independent contractor.

By their signatures to this Agreement, each party certifies that it is his or her considered judgment that the CONTRACTOR engaged under this Agreement is in fact an independent contractor.

In witness whereof, the parties hereto have set their hands the day and year first above written.

COUNTY OF SANTA CRUZ

CONTRACTOR

By: _____
County Purchasing Agent

By: _____

Address:

Telephone:

Tax ID number:

Approved as to insurances:

Janet McKinley 9-29-99
Chief, Risk Management Division

Approved as to form:

[Signature]
Assistant County Counsel



SANTA CRUZ COUNTY
SUPERIOR CUSTOMER SERVICE FOR
HEALTH SERVICES AGENCY

AGENDA
8:00 AM - 5:00 PM

MAP WORKSHOP LEADER
JIM L. WHITE

- 8:00 a.m. Welcome
- Introductions
- Ground Rules For The Day
- The Pareto Principle
- “Concentrate on the vital few, ignore the trivial many.”
- 8:15 a.m. Goals Of The Workshop
- What Is The Definition Of Customer Service?
- Definition of a customer.
 - Definition of service.
 - Examples of customer service.
- 8:40 a.m. Dimensions Of Customer Service
- Procedural -policies, procedures, systems.
 - Personal -interpersonal, relationship, behavior patterns, attitude, mood, manner.



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8:45 a.m. What Your Customer Needs

- Common Philosophy Of Organizations That Provide Superior Customer Service
- Define similarities

9:00 a.m. Customer Service Differs From A Product

Cycle Of Service

- Service diagram.
- Moments of truth.
- Variations from customer to customer.
- Different types of service.

Your Customer's Moments Of Truth

- Manage your customers experience.
- Opinions customers form.

Exercise

- List your customer's moments of truth.

9:15 a.m. What Is The Criteria For Superior Customer Service At HSA

- Define criteria.
- Develop evaluation matrix.
- Evaluate from 1-10.

9:30 a.m. Break

9:40 a.m. Customer Service Strategy

- What is a strategy?
- Examples of service strategies.
- What is Company's customer service strategy?



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Exercise

Evaluating HAS strategy

- What is HSA mission statement?

9:50 a.m. Develop an HSA Customer Service Situation Analysis

- Strengths.
- Weaknesses.
- Threats.
- Barriers.

10:05 a.m. Team Consulting Exercise

- Define what HSA customer service strategy should be **today**.
- Select breakout groups.
- Team consulting guidelines.

10:10 a.m. Time: 15 minutes.

10:30 a.m. Team leaders: present recommendations.

10:40 a.m. Break

10:50 a.m. Who Is Responsible For Customer Service At HSA?

Exercise

What skills are required to provide superior customer service?

- Define skills.
- Develop 1-10 matrix.
- Self-evaluation.

11:10 a.m. Exercise

Identify participant's customer service strengths and opportunities for improvement from MAP questionnaires.

11:20 a.m. Customer Service Style Analysis

- Participants DISC analysis.



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11:30 a.m. Personal Communication Skills

Communicating With Your Customer

- The “message.”
- At HSA, ours is a “relationship.”
- Ways front line staff communicates.
- Define your communication strengths.
- Keys to success - be prepared.
- Knowledge of the customer.
- Research files, history with HSA, correspondence, look for problems of the past, actions taken.

“Know before you go.”

Quality Customer Service Techniques

- Define quality techniques.
- 4 methods of defusing a difficult situation.
- 6 keys to cooling down an irate customer.
- What will work at HAS?

Customer Complaints - An Opportunity

- How to effectively use a complaint to your advantage.

Group Exercise

- List typical customer complaints.
- How do you handle these complaints?

Empowerment

- What is it?
- Who gives it?
- Why do we need it?
- Can it work at HSA?



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- 12:00 p.m. Lunch
- 12:45 p.m. Assessing Your Customer Service Readiness
- Test - Management readiness.
 - Test - Staff readiness.
- 1:15 p.m. Group Discussion
- Identify strengths and areas for improvement in providing customer service at HAS
 - Prioritize top 3 areas requiring attention.
- 1:30 p.m. Team Consulting
- Each team to develop corrective action steps for one vital customer service area for improvement at Company.
 - Select break out groups.
 - Time: 20 minutes.
 - Team leaders: present recommendations.
- 2:15 p.m. Break
- 2:25 p.m. Why Do We Resist Change?
- List reasons.
 - Review Checklist.
- 2:30 p.m. Exercise
- What can I do to be more customer service oriented?
 - What can the Company do to be more customer service conscious?
- 2:50 p.m. Team Consulting
- Read each participant's questionnaires.
 - Identify vital area requiring corrective action.
 - Define breakout group.
 - Develop action step.
 - Document action step.
 - Present action steps to the group



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Developing Your Customer Service Action Plan

4:00 p.m. Goal Setting

- Set two short-term personal customer service growth goals with action steps and due dates.
- Set two long-term personal customer service growth goals with action steps and due dates.

Goal Setting

- Set two short-term group customer service goals with action steps and due dates.
- Set two long-term group customer service goals with action steps and due dates.

4:20 p.m. Summary, Review

What Did You Learn Today? The Most Vital Thing?

What Will You Do Differently Back At Work As A Result Of This Workshop?

Evaluation Of The Workshop

5:00 p.m. Adjourn



**SANTA CRUZ COUNTY
HEALTH SERVICES AGENCY**

**AGENDA
SKILLS DEVELOPMENT AND TEAM BUILDING WORKSHOP**

**8:00 AM - 5:00 PM
MAP WORKSHOP LEADER
JIM L. WHITE**

7:45 AM Coffee

8:00 AM Introduction

Ground Rules For The Workshop
The Map Method
The Map Management System

- Vital productivity factors
- *Goals and controls
- *Team consulting
- *Team meetings

Goals Of The Workshop

Output From The Workshop

Participant's feedback report

The Pareto Principle

- "Concentrate on the vital few, ignore the trivial many"



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Video Exercise

- Participant Key Job Related Problem Identification
- 1 minute video presentation --

Personal Growth Program

Self Appraisal

- Personal growth barriers

Exercise

Identification Of Participants Strengths And Opportunities For Growth

- Feedback from MAP questionnaires

Identification Of 3 Key Personal Motivators

Setting Personal Growth Goals

“You Incorporated”

You Are The President Of “You Incorporated”

- Personal growth strategies

What It Takes To Be A Professional HSA Employee In The 2000’s

Hallmarks Of The Professional HSA Employee

- Develop 1-10 criteria
- Self-evaluation exercise

9 Keys To Personal And Professional Success



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Firo-B Behavioral Profile Scores And Analysis

I = Inclusion Score: 0-9
C = Control E = Expressed Behavior
A = Affection W = Wanted Behavior

Break

Review Of The Six Functions Of A Professional Manager

Communicating: Conveying meaning and obtaining understanding

- Barriers to communication
- Communication exercise
- Improving effective communications

Planning: Developing goals and strategies for future action

- Hourly, daily, weekly, monthly, quarterly, yearly planning
- Effective decision making
- Prioritizing
- Goal Setting

Organizing: Grouping work and resources productively in relation to goals

- Utilization of resources
- Organization charts
- 12 steps in delegating effectively



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Staffing: Recruiting, selecting, developing and retaining people

- Hiring
- Training

Effective Time Management

- Philosophy Of Time
- “Either You Control Time Or Time Will Control You”
- “Concentrate On The Vital Few; Ignore The Trivial Many”

Time Management Solutions

- Ground rules
- Have an open mind
- Keep your time management system simple
- Identify time wasters and time robbers
- Cause and cure analysis
- Learn to prioritize
- Back-to-the-basics

*Self-management

*At the office

*Daily to do lists



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The Physical Aspect of Time Management

- Energy curve
- Day-Timer System
- 11 Techniques To Improve Your Time Management Skills

Controlling: Measuring performance and taking appropriate action

- Vital factors
- Measuring performance
- Holding people accountable
- Personal accountability
- Taking corrective action

“Attack the problem, not the person”

- Goals and controls system of accountability
- The Vital Factor’s Team Meeting
- Monthly progress review team meetings

Leading: Inspiring self-motivation in people to achieve goals

- Attributes of a leader
- Effective leadership

“Successful people like to deal with successful people”



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12:00 PM Lunch

12:45 PM Video Playback and Critique Of Each Participant's Communication, and leadership style

MAP Team Consulting Guidelines Review

Read Participant Files MAP Questionnaires

- Each participant to identify one key personal growth area requiring improvement at Company
- Identify team consulting breakout groups
- Solicit recommendations for corrective action from consulting team members
- Action reports by each participant

Break

Review How To Set Business and Personal Growth Goals

Goal Setting Exercise

- Identify 2 personal growth goals
- Identify 2 short-t&m department goals

Teamwork

- What Is The Definition Of Teamwork?
- Who Is Responsible For It?
- Characteristics Of Teamwork At Santa Cruz County Sheriff Department
- Develop 1-10 evaluation
- -Team analysis



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Group Discussion

Define Obstacles To Our Success, To Achieving Your Goals

Team Consult Obstacles

4:15 p.m. Summary and Closing Remarks

What Did You Learned Today?

The Most Vital Things?

Evaluation of Workshop

5:00 p.m. Adjourn