

SWAMP Manual

CA Surface Water Ambient Monitoring Program (SWAMP)

2023-02-03

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Welcome!

This is an online reference and resource written by and for the Surface Water Ambient Monitoring Program ([SWAMP](#)) at the [California State Water Resources Control Board](#) (State Water Board).

The SWAMP Team is composed of multiple team members at the State Water Board within the SWAMP Unit, SWAMP Information Management and Quality Assurance Center ([SWAMP IQ](#)), and others in the Office of Information Management and Analysis ([OIMA](#)).

Content in this manual includes curated information that members of the SWAMP Team have found helpful to support onboarding/offboarding, collaboration, communication, and our collective culture. It is a place to document institutional knowledge and provide references to available resources.

This [Quarto book](#) is an open, living, and continuously iterating resource. If you have suggestions for additions or revisions you think should be incorporated into this book, please follow the guidance provided in the [How to contribute](#) chapter.



1 About SWAMP

1.1 Overview

SWAMP sits within the Water Board's Office of Information Management and Analysis (OIMA), which serves as an advocate for data management, a bridge between data collectors and users, as well as, provides transparency of the Water Board's information management infrastructure.

The SWAMP mission is to provide resource managers, decision makers, and the public with timely, high-quality data, information and tools needed to evaluate the condition of all surface waters throughout California.

SWAMP accomplishes this through carefully designed, externally reviewed statewide and regional surface water monitoring programs, and by assisting other entities state-wide in the generation of comparable data that can be brought together in integrated assessments that provide answers to current management questions.

In addition to providing information and tools, SWAMP's vision is to help enhance monitoring, assessment and reporting activities throughout the Water Boards.

SWAMP IQ strives to promote question-driven monitoring, and to ensure the highest quality data is used to evaluate the health of California's water bodies.

SWAMP IQ assists ambient monitoring projects and programs throughout the state by offering resources that support each stage of water quality monitoring, from sample collection to data entry, as well as providing quality assurance review, verification, and data storage.

1.2 Additional Resources

- For an overview of SWAMP - please see the [SWAMP website](#) and [SWAMP IQ website](#).
- **The SWAMP Strategic Action Plan (SAP)** describes current program priorities, and strategies to meet program goals and make our vision and mission concrete: [SWAMP SAP, 2020 - 2023](#)
- **The SWAMP Quality Assurance Program Plan (QAPP)** provides a detailed overview of SWAMP monitoring standards and requirements: [SWAMP QAPP, 2022-2024](#)

- For an overview of OIMA - please see the [OIMA website](#)
- The OIMA Strategic Data Action Plan (SDAP) describes current OIMA priorities and strategies to meet the office's goals: [OIMA SDAP](#)
 - The [OIMA SDAP Project Portfolio Write-ups](#) provide a summary and status of all ongoing SDAP Projects.

Part I

Culture

2 Values

What are our values, and what do we want our culture to be?

3 Code of Conduct

Let's write one & discuss!

4 Expectations

All SWAMP staff are expected to abide by the following:

4.1 Work schedule

- *Regular Work Hours:* Please use your Outlook calendar to show your regular work hours to assist in scheduling meetings.
- *Teleworking:* All staff are required to adhere to the provisions of the [CalEPA Telework Policy](#), the [Water Boards Telework Program](#), and Remote Access Security Standards and requirements of approved telework agreements. Also see the [CA Telework Employee Guidelines](#)
- *Notification of workday start:* When you start your day, please send a Teams chat in the shared unit channel. This can be as simple as “Hello team!”. The point is to let us know you’re around and to share a moment of virtual connection with the rest of the team.
- *Scheduling and taking time off*
 - *To request time off:* Send your supervisor an email with the days/times you would like to take off and include if you would like to make up the time by staying late or coming in early. Otherwise it will be assumed that you are using leave time and that you have checked your leave balances and confirmed that you have adequate leave time available. Your supervisor will respond to your email approving your time off request, or if there is a conflict (only rare occurrences), your supervisor will notify you if it is not approved and will work with you to find an alternate time for you to take off.
 - *Once time off has been approved:* Mark on your Outlook calendar when you will be out of the office (vacation, appointment, etc.)
 - *Before you leave for your time off:* Turn on an “out of office” message in Outlook if you will be away for a day or more
- *If you are sick, late, or need to leave for an emergency:* Send your supervisor an email, Teams chat or text their mobile phone notifying them that you will not be in, will be more than 30 minutes late, or had to leave early. When you are able, mark that time on your Outlook calendar.

4.2 Communication

- *Keeping each other in the loop:* Please include your supervisor on emails, in meetings, or other communications when necessary, so that they are aware of unit business.
- *Open door/chat policy:* Our unit maintains an open door/chat policy, so please feel free to stop by or send a Teams chat or email if you need to talk, chat, consult, etc.
- *Communication response time:* Please aim to reply to all emails or phone calls within 3 business days.
- **ADD Norms regarding when to use email vs. Teams chat vs. Phone call vs video call vs zoom**

4.3 Expectations of supervisors

SWAMP Supervisors commit to uphold the following:

- Encourage each of you to lead in your own way
 - Create space to let you do your jobs, empower you to succeed and do what you're good at and interested in
 - Allow you to make decisions, and provide guidance as needed
- Listen to you and understand your skillsets, strengths and interests, and ensure your projects align with those skillsets, strengths and interests
- Treat each of you respectfully, equitably, and fairly
- Understand and get to know each of your individual styles and to meet you there
- Be there for each of you, via regular 1:1 check-ins, specific project meetings, chat, phone, email to talk with you about projects, workload, interests, goals, inspiration, brainstorming, etc.
- Show my appreciation and gratitude for your work and give recognition for accomplishments
 - Express gratitude regularly through words and actions for the good work each of you do
 - Share your work with others to highlight and showcase projects, including presentations to executive management, board members and regional colleagues
 - Provide public recognition for exceptional work through Superior Accomplishment Award nominations

- Communicate in a consistent, professional, friendly, and meaningful manner
- Clearly define roles and responsibilities
- Provide feedback, mentorship and training
- Create a safe space for failure (and innovation!)
- Provide strong leadership and a clear vision
- Create a dedicated and balanced work environment
- Share information to reduce uncertainty about your job, OIMA, and Board activities
- Give team members opportunities to participate in decisions that affect their jobs
- Consult team members about scheduling
- Clearly communicate work rules and job expectations
- Hold staff and myself accountable to the work rules and job expectations
- Ensure that workload is suitable and that deadlines are realistic given the resources
- Clearly communicate when quality and quantity of work do not meet standards
- Provide opportunities for career development
- Provide opportunities for social interaction among employees
- Maintain a positive attitude even when faced with challenging situations and tasks
- Maintain a zero-tolerance policy for harassment

5 Professional Development

We are very supportive of individual and team professional development opportunities. Below are a couple of resources SWAMP Team members can tap into to advance their professional skills.

5.1 Individual Development Plan (IDP)

Staff can complete an [IDP Form](#) annually to articulate their performance objectives for the coming year as well as their plans for achieving those objectives. Once drafted, staff review the document with their supervisor, revise as appropriate, and submit. Completing the form can help prioritize which trainings and other opportunities the individual might request to attend in the coming year.

5.2 Training

Training Request Forms are required for all trainings, even Water Boards Academy trainings and required workplace trainings because they provide documentation needed in case of audits. See the [Training Section](#) of this Manual for more details.

5.3 Conferences

Attending conferences can help staff practice and develop their public speaking skills as well as provide opportunities to network and find and develop new partnerships (or nurture existing ones!). Being able to attend conferences requires lots of planning and paperwork, so it's a great idea to think about which conference(s) you might request to attend during your IDP process, and be ready to submit all of the required paperwork well in advance. See the [Training Section](#) of this Manual for more details.

Part II

Administrative goodies

6 Onboarding

Here is a non-comprehensive, but hopefully informative guide to onboarding to the SWAMP Unit. The majority of this information in this section is aimed towards starting at SWAMP as a rank-and-file (non-supervisory) state employee. Please re-reference this page throughout your time at SWAMP!

6.1 HR forms

On your starting day, you will receive a package of forms and documents from the HR department including:

- Your duty statement
- Tax forms
- Direct deposit forms
- Questionnaires (diversity, military)
- CalPERS forms
- Leave forms
- Medical insurance forms

You will also be asked to submit a photocopy of either your passport or a combination of your driver's license and social security card to the HR representative (currently Alicyn Chappelle). All forms apart from the medical insurance forms must be submitted within the first couple of days. Medical insurance forms must be submitted within the first 60 days for you to qualify for enrollment; however, the sooner you submit these forms the sooner you will have health coverage.

6.2 Bargaining units

Each classification within the SWAMP unit is associated with a bargaining unit. The bargaining units, with the State, determine many of the benefits & guidelines described here. For that reason, you should read the latest contract or Memorandum of Understanding (MOU) for your bargaining unit to determine benefits as applicable for you. Additional benefits specific to your bargaining unit may exist for you based on the MOU that are not described in this

manual. Finally, supervisory positions may have varying benefits beyond those listed in this manual.

SWAMP Position Classification	Bargaining Unit	CBID
Scientific Aid	11	R11
Environmental Scientist (incl. Senior Specialist)	10	R10
AGPA	1	R01
Senior Environmental Scientist - Supervisory	10	S10

6.3 Leave types

When onboarded, employees in most classifications will be able to select a leave type: **annual leave** vs. **vacation/sick leave**. Comparisons of leave accrual and use between leave types are available in [this chart](#).

Important FAQ for leave types:

- You are only allowed to switch leave types every 2 years. Check with our HR liaison about switching leave types.
- Leave types are also connected to different types of non-work-related disability leave, which may impact your income should you need to go on disability leave. Non-work-related disability leave types are compared for Unit 10 employees on this [flyer](#). More information about non-work-related disability leave is also available on the EDD [website](#).
- Leave accrual can be impacted by the number of days/hours you work in a month.

Need additional leave?

Under the [Voluntary Personal Leave Program](#), you can exchange a percentage of your salary to accrue additional leave hours per month. See the link above for more information, and contact our personnel specialist for more details.

6.4 CalPERS

CalPERS is the [California Public Employees Retirement System](#), which you will be enrolled in as a new employee. It provides benefits including medical coverage (health, dental, and vision insurance) and retirement for employees of the state of California.

6.4.1 Medical coverage

You should select health insurance by submitting the appropriate forms within 60 days of starting with the State. If you select health insurance, you will pay the difference between what the state provides for healthcare (a base amount monthly) and the monthly cost for your selected health insurance. This amount is removed from your monthly paycheck. Employees may elect to receive cash in lieu of their state-sponsored medical insurance and/or dental insurance plan through the [FlexElect](#) program. You must certify you have qualifying group health and/or dental insurance through a spouse, domestic partner, or other source. FlexElect cash is distributed monthly.

You can make changes to your health, dental, and vision insurance selections two ways:

1. Annually during open enrollment, which occurs in the fall of each year. Your new insurance selections begin the following January.
2. After a [qualifying event](#) in your life.

To learn more about the health coverage available to you, please visit the CalPERS website as well as the website for your [bargaining unit](#) to learn about costs specific to you. We include some helpful links below:

- [CalPERS Health Program Guide](#) (pdf) – broad overview of the health program
- [CalPERS 2023 Health Benefits Summary](#) (pdf) – description of different health plans and their statewide availability
- [CalPERS 2023 Plans & Rates](#) (web link)

6.4.2 Retirement benefits

6.5 Timesheets & Pay

6.6 Office- and Remote-centered work

6.7 Equipment

7 Travel

Exempt, excluded, and represented state employees may be eligible for the reimbursement of authorized out-of-pocket expenses that are reasonably, actually, and necessarily incurred as a result of conducting state business

7.1 Quick links

- [Travel Reimbursements](#)
- [HR Allowances and Travel Reimbursements](#)
- [Water Board's Travel Page \(Intanet\)](#) - can only access on VPN
- [Travel Forms \(Intranet\)](#) - can only access on VPN

7.2 Travel Overview

The [Travel Help Desk](#) can provide assistance or answer questions about making travel reservations, recommendations while traveling, and asking for reimbursement when you return. The Travel Help Desk for the Waterboards is comprised of the Travel Unit staff in the Accounting Office as part of the Division of Administrative Services.

Visit [CalTravelStore](#), a self-serve site for all government business travel needs. Travelers are able to make reservations for lodging, airfare, rental car & rail fare through Concur which is personalized to meet the needs of State government travelers.

CalTravelStore New User Registration

For new users to be added to CalTravelStore to begin making reservations, contact the CalATERS Travel Help Desk.

Email: CalATERS-Travel@waterboards.ca.gov

Phone: (916) 341-5036

TIPS:

1. Receipts should be submitted for every item of expense of \$25 or more. When receipts are not required to be submitted with a travel expense claim, it is the employee's responsibility to maintain receipts and records of their actual expenses. Read more information on reimbursement [here](#).
2. Know your [reimbursement rates](#)! State employees may be eligible to receive reimbursement for expenses such as:
 - Method of travel (transportation)
 - Meals and incidentals
 - Short-term lodging
 - Out-of-state travel
 - Out-of-country travel
 - Personal vehicle mileage
 - Other actual and necessary business and/or travel costs incurred while conducting official state business

7.3 Contacts

CalATERS Travel Help Desk

Phone: (916) 341-5036

Email: CalATERS-Travel@waterboards.ca.gov

8 Training

As a Water Boards employee, you have access to training and training-related services to support your personal and professional development, all in support of the Water Boards' mission. Training Services is comprised of the *Training Academy* and *Training Office*, which offer different types of training and which you access differently.

- *Water Board Training Academy*
 - Offers in-house virtual and in-person training courses
 - Staff self-register for courses via the [Academy Registration System \(GSMU\)](#) - follow [these instructions on how to attend Academy courses](#)
 - Works with staff to develop new classes
- *Water Boards Training Office*
 - Gives access to external events (trainings, conferences, PE/PG license preparation classes and higher education requests)
 - Always submit a TRF to your [Training Liaison](#) - follow [these instructions on how to attend external events](#)
 - **Never** pay for a class yourself, without explicit pre-approval from the Training Office (or you won't be eligible for reimbursement)

8.1 Contacts:

- Training Liaison: Devan Burke
- Backup Training Liaison: Melissa Morris

8.2 Internal:

- Internal Training refers to in-house training courses supported by the *Water Board Training Academy*.
- **How to sign up for Internal Water Board Training Academy Courses:**
 - Watch your inbox for course announcement emails
 - Search the [Academy Registration System](#)
 - Explore the FY 22/23 Academy Course Catalog ([Excel](#)) ([PDF](#))
- **Approval Process:**
 - Self-register on the [Academy Registration System](#)
 - Download the current [TRF](#)
 - Fill out the TRF and obtain management approvals (digital signature)
 - Email completed TRF to your **Training Liaison** (please do not email to the **Training Office**)
- **Attendance Reminder:** To receive attendance credit, you must be present and participate for the entirety of the course or you will receive a [no-show](#). Although we understand that emergencies arise during training, missing more than 15-minutes of any course will result in a no-show with no attendance credit given. This is a Training Services guideline that cannot be overruled by the instructor. To ensure proper attendance, rename your video box to list your first and last name.

8.3 External:

- External Training refers to external events (training, conferences, PE/PG license preparation classes and higher education requests) supported by the *Water Boards Training Office*.
- **When is Training Office Approval Required?**
 - There is a registration/tuition cost
 - There are travel costs (hotel, car rental, per diem, etc.)
 - You want the event added to your training history
- **How to sign up for (non-Academy) External Training:**

- Download the current [TRF](#)
 - Fill out the TRF and obtain approvals (digital signature)
 - Email completed TRF to your Training Liaison
 - Training Liaison submits TRF to Training Office for processing, by submission deadline
 - Training Office emails you the approved TRF when registration is complete
- **How to sign up for (non-Academy) Conferences:**
 - Be prepared to plan head when requesting to attend any Conference or External Training. Visit the [FY 22/23 Training Submittal Deadlines](#) to begin planning your request. The current submission deadline for Conferences is **35 business days prior to the registration deadline**.
 - Download the current [TRF](#) and [Conference Package](#)
 - Fill out the TRF and Conference Package and obtain approvals (digital signature)
 - Attach copy of registration form, event agenda, meal or session preferences (if applicable), etc.
 - Email completed TRF and Conference Package to your Training Liaison
 - Training Liaison submits them to Training Services for processing
 - Training Services emails you the approved TRF when approval is received

8.4 Resources:

- [Training Forms](#)
- [Water Board's Training Services Page \(SharePoint\)](#)
- [Training FAQ's](#)
- [Training Services Registration Guidelines](#) (Visit if you're unsure of the training type you're wanting to attend)
- [FY 22/23 Training Submittal Deadlines](#)

8.5 Recommended On-demand Training Resources:

- [College of Water Informatics \(CoWI\) Data Tool Kit](#)
- [Tribal Historical and Legal Foundations](#)
- [Tribal Cultural Resources](#)
- [Tribal Cultural Awareness and California Native American History](#)
- [CA Water Quality Law 101](#): foundational training in CA law including Porter Cologne Water Quality Control Act, Federal Clean Water Act, Basin Plans, etc.

9 Tech Access, Setup, & Support

Phew!

9.1 Need equipment?

9.2 Remote desktop vs. VPN

9.3 Accessing & downloading software

- ESRI Services (ArcGIS Pro/ArcGIS Portal)
 - **ArcGIS Pro** is the main desktop GIS application available to Water Boards staff. ArcGIS Pro can be downloaded from the Software Center. If you do not see ArcGIS Pro in the Software Center, contact the Help Desk at help@waterboards.ca.gov so that they can add it your list of available applications. Future releases of ArcGIS Pro and other ESRI applications should be automatically added to the Software Center as they are approved by DIT. You can use the Software Center to update your installation.
 - The **Water Boards ArcGIS Portal** (<https://gispublic.waterboards.ca.gov/portal/>) is an online platform for publishing and sharing ESRI-produced GIS resources with others at the Water Boards. These resources can also be shared with people outside of the Water Boards (with approval). For those familiar with ArcGIS Online, ArcGIS Portal is the enterprise version of ArcGIS Online. With ArcGIS Portal, you can:
 - * Create and share maps, story maps, and other applications
 - * Search for GIS content within the Water Boards
 - * Create groups to share GIS information with colleagues
 - * Download maps, layers, and GIS data for use in ArcGIS Pro and other applications

To activate your Water Boards ArcGIS Portal membership (required for viewing, downloading, and publishing resources on the portal), email the DIT GIS Unit at gis@waterboards.ca.gov.

To log into Portal, use the same username and password that you use for your state-issued laptop or computer.

- * Username: The default format is “[your work PC login]@EPA” (e.g. jsmith@EPA)
OR “epa\[your work PC login]” (e.g. epa\jsmith)
- * Password: [your work PC password]
- Public sharing: Resources published on the ArcGIS Portal can be shared outside of the organization to the public (no Portal log-in required), but this requires approval from the DIT GIS Unit. See the Public Sharing Requirements on the GIS Unit wiki ([start \[gis\] \(ca.gov\)](#)) and ensure that you complete each one of the steps before you submit a completed Public Publishing Form to the GIS Unit. The approval process can take some time, depending on how complex your project is and how busy the GIS Unit staff are, so plan ahead if you are working against a deadline.
- For more information about ArcGIS Pro and the Water Boards ArcGIS Portal, view the [GIS Unit wiki](#).

9.4 Community

10 Procurement

How do we get the items we need?

10.1 Technical

10.2 Office supplies

10.3 Monitoring supplies?

11 Offboarding

You're moving on and up – here's what you need to know & do before we wish you a fond farewell.

11.1 HR forms

11.2 CalPERS

11.3 Bargaining Units

11.4 Timesheets & Pay

11.5 Equipment

12 SWAMP Life Cycle

All SWAMP activities align with some component of the [data life cycle](#), which consists of the seven phases outlined below. Here, we provide resources the SWAMP Team uses to effectively implement each phase.

12.1 Plan and Prepare

The SWAMP Unit, and all of the individuals within it, tend to have a number of co-occurring projects that are meant to help us advance and ultimately achieve our Mission. Managing multiple projects at once, given our limited resources – time, funding, capacity (i.e. one person can only do so much in a day!) – can be challenging – so we like to make time each year to review all of our projects and prioritize them. This helps us focus our efforts and resources over the coming year.

There are a couple of different strategic planning moments that occur each year:

- **Annual Work Plans;** In December/January, we recommend taking time to update individual work plans to account for changes in priorities and bandwidth
- **Program Strategic Planning**

12.2 Collect and Process

12.3 Assure and Analyze

12.4 Preserve and Store

Currently, data and information generated by SWAMP are stored in a number of different places. The SWAMP Team is working on developing a standard and consistent data and document retention system. Until then, the information below is meant to help increase transparency on where things are currently stored.

i Note

Note that many of the links below require special access or for the user to be securely connected to the Water Boards network (via VPN or Remote Desktop)

Microsoft SharePoint & OneDrive

- Online storage site used for documents that will be shared and edited with people internal to Water Boards – avoids version control issues
- [SWAMP SharePoint](#), [SWAMP IQ SharePoint](#), [OIMA SharePoint](#)

Network Drives

- SWAMP: S:\OIMA\SHARED
- SWAMP IQ: S:\OIMA\SHARED\QA&DM
 - Used to store core, static materials dated back to SWAMP IQ’s start in 2014.
 - Archive for old documents and storage for documents we want backed up.

Google Drive

- Online storage site used for documents that will be posted to the SWAMP and SWAMP IQ Wiki pages
- Shared and edited with people external to Water Boards

FTP Site

- The [SWAMP FTP Site](#) is used to share large files and to submit field data through data entry shell databases
- Request the username and password from OIMA-helpdesk@waterboards.ca.gov

12.5 Publish and Share

12.5.1 SWAMP Data

After SWAMP Data are assessed and processed by SWAMP IQ, they are published and stored in the [California Environmental Data Exchange Network](#) (CEDEN), which is also pushed to and available on the [California Open Data Portal](#).

12.5.2 SWAMP Information & Products

[Water Boards Website](#): our main way of sharing information and products to the public

[SWAMP Wiki](#): what we use to share information to with our external contractors and collaborators

[SWAMP Data Dashboard](#): the primary SWAMP data visualization tool

[GitHub](#): used to develop and share select SWAMP products (like this Manual!)

12.5.3 SWAMP Meetings & Events

Meeting or Event	Frequency	Audience
SWAMP Roundtable	Quarterly	Internal SWAMP Regional and Statewide Program Coordinators, external contractors, invited guests
California Aquatic Bioassessment Workgroup (part of the Statewide Bioassessment Monitoring Program)	Quarterly Meetings Annual Meeting (CABW)	Quarterly meetings: Bioassessment partners Annual meeting: Open to the public
Safe to Eat Workgroup (STEW) (part of the Statewide Bioaccumulation Monitoring Program)	Quarterly	Open to the public
California Cyanobacteria and Harmful Algal Bloom (CCHAB) Network (part of the Statewide Freshwater and Estuarine Harmful Algal Bloom (FHAB) Program)	Quarterly	Open to the public

12.6 Discover and Integrate

12.7 Describe

13 Contacts

We should ask whether internal or team contact information goes here :)

13.1 SWAMP Team

Name	Title	Program Area
Ali Dunn	Senior Environmental Scientist, Supervisor, Unit Lead	Statewide SWAMP Coordinator of statewide monitoring programs, plans and budgets Staff supervisor
Anna Holder	Environmental Scientist	Bioaccumulation Program Coordinator Data science and science communication Openscapes
Corey Clatterbuck	Environmental Scientist	Healthy Watersheds assessment and data integration lead Data science and science communication Openscapes
Mary Tappel	Environmental Scientist	Webpage updates
Michelle Tang	Environmental Scientist	Data science, data visualization and programming (JavaScript, Python)
Shuka Rastegar-pour	Environmental Scientist	Bioassessment Program Coordinator
Sydney Rilum	California Sea Grant Fellow	Data science, data visualization and science communication

13.2 SWAMP IQ Team

Name	Title	Program Area
Tessa Fojut	Senior Environmental Scientist, Supervisor, Unit Lead	SWAMP Quality Assurance Officer Database Manager
Candace Levesque	Environmental Scientist	Bioassessment (algae) Data Manager
Cui (Scarlett) Li-Gherman	Scientific Aid	
Delany Broome	Environmental Scientist	Chemistry Data Manager
Jennifer	Environmental Scientist	Tissue Data Manager
Salisbury		CEDEN Vocabulary Manager
Kimberly Pham	Environmental Scientist	Chemistry Data Manager
Lindsey Metz	Environmental Scientist	Microbiology Data Manager
Tony Gill	Environmental Scientist	Toxicity Data Manager SPoT Program Coordinator
Toni Marshall	Environmental Scientist	Bioassessment (benthic macroinvertebrates) Data Manager

14 How to contribute

In summary, this book has no content whatsoever.

15 References