

**AGENDA**  
1021<sup>st</sup> MEETING OF THE BOARD OF TRUSTEES  
OF THE ALAMEDA COUNTY MOSQUITO ABATEMENT DISTRICT  
JANUARY 10TH, 2024

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TIME: 5:00 P.M.

PLACE: Join in person at the Office of the District  
23187 Connecticut Street, Hayward, CA 94545 *or*  
Join remotely via teleconference: <https://us02web.zoom.us/j/81527630478>  
**see below for additional details.**

TRUSTEES: Victor Aguilar, President, City of San Leandro  
Cathy Roache, Vice-President, County-at-Large  
Tyler Savage, Secretary, City of Alameda  
Robin López, City of Albany: *from 1000 San Pablo Ave, Albany, CA*  
P. Robert Beatty, City of Berkeley  
Kashef Qadri, City of Dublin  
City of Emeryville, vacant  
John Zlatnik, City of Fremont  
George Syrop, City of Hayward  
City of Livermore, vacant  
Eric Hentschke, City of Newark  
Jan O. Washburn, City of Oakland  
Hope Salzer, City of Piedmont: *from 76 Cambrian Ave, Piedmont, CA*  
Valerie Arkin, City of Pleasanton  
Subru Bhat, City of Union City

1. Call to order.
2. Roll call.
3. President Aguilar invites any member of the public to speak at this time on any issue relevant to the District (each individual is limited to three minutes).
4. Approval of the minutes of the 1120<sup>th</sup> Regular Meeting held December 13<sup>th</sup>, 2023 (**Board action required**).
5. Approval of the minutes of the Special Meeting held December 13<sup>th</sup>, 2023 (**Board action required**)
6. Election of Board Officers. Gavel transfer from President Aguilar to the newly elected President. (**Board action required**)
7. Review of 2024 Board Meeting dates (**Possible Board action required**)
8. Review Finance Committee membership and appointing a Chair (**Board action required**)
9. Appointment of an ad-hoc policy review committee to review proposed changes to district policy (**Board Action required**).
10. Presentation and approval of ACMAD Strategic Plan 2024-2026 (**Board action required**)

11. Form 700 FFPP Conflict of Interest Report (Information only).
12. Financial Reports as of December 31<sup>st</sup>, 2023 (Information only).
  - a. Check Register
  - b. Income Statement
  - c. Investments, reserves, and cash report
  - d. Balance Sheet
13. Presentation of the Monthly Staff Report (Information only).
14. Presentation of the Manager's Report (Information only).
  - a. Trustee & Staff Anniversary Recognitions
  - b. CSDA 2024 Special District Leadership Academies:
    - i. 2/4 - 2/7; San Luis Obispo
    - ii. 4/14 - 4/17; San Diego
    - iii. 11/3 - 11/6; San Rafael
  - c. Required training expiration date:
    - i. AB 1234: Savage (12/23/23), Hentschke (1/1/24), Roache (1/13/24)
    - ii. AB 1825: Aguilar (8/11/23)
15. Board President asks for reports on conferences and seminars attended by Trustees.
16. Board President asks for announcements from members of the Board.
17. Board President asks trustees for items to be added to the agenda for the next Board meeting.
18. Adjournment.

RESIDENTS ATTENDING THE MEETING MAY SPEAK ON ANY AGENDA ITEM AT THEIR REQUEST.

**Please Note: Board Meetings are accessible to people with disabilities and others who need assistance. Individuals who need special assistance or a disability-related modification or accommodation (including auxiliary aids or services) to observe and/or participate in this meeting and access meeting-related materials should contact Ryan Clausnitzer at least 48 hours before the meeting at 510-783-7744 or [acmad@mosquitoes.org](mailto:acmad@mosquitoes.org).**

**IMPORANT NOTICE REGARDING COVID-19 AND TELECONFERENCED MEETINGS:**

Based on the mandates by the Governor in Executive Order 33-20 and the County Public Health Officer to shelter in place and the guidance from the CDC, to minimize the spread of the coronavirus, please note the following changes to the District's ordinary meeting procedures:

- The District offices are not open to the public at this time.
- The meeting will be conducted via teleconference using Zoom. (See Executive Order 29-20)
- All members of the public seeking to observe and/or to address the local legislative body may participate in the meeting telephonically or otherwise electronically in the manner described below.

**HOW TO OBSERVE THE MEETING:**

**Telephone:** Listen to the meeting live by calling Zoom at **(669) 900-6833**  
Enter the **Meeting ID#** 815 2763 0478 followed by the pound (#) key.

**Computer:** Watch the live streaming of the meeting from a computer by navigating to <https://us02web.zoom.us/j/81527630478>

**Mobile:** Log in through the Zoom mobile app on a smartphone and enter **Meeting ID#** 815 2763 0478

#### HOW TO SUBMIT PUBLIC COMMENTS:

**Before the Meeting:** Please email your comments to [acmad@mosquitoes.org](mailto:acmad@mosquitoes.org), write "Public Comment" in the subject line. In the body of the email, include the agenda item number and title, as well as your comments. If you would like your comment to be read aloud at the meeting (not to exceed three minutes at staff's cadence), prominently write "Read Aloud at Meeting" at the top of the email. All comments received before 12:00 PM the day of the meeting will be included as an agenda supplement on the District's website under the relevant meeting date and provided to the Trustees at the meeting. Comments received after this time will be treated as contemporaneous comments.

**Contemporaneous Comments:** During the meeting, the Board President or designee will announce the opportunity to make public comments and identify the cut off time for submission. Please email your comments to [acmad@mosquitoes.org](mailto:acmad@mosquitoes.org), write "Public Comment" in the subject line. In the body of the email, include the agenda item number and title, as well as your comments. Once the public comment period is closed, all comments timely received will be read aloud at the meeting (not to exceed three minutes at staff's cadence). Comments received after the close of the public comment period will be added to the record after the meeting.

## MINUTES

### 1120<sup>th</sup> MEETING OF THE BOARD OF TRUSTEES OF THE ALAMEDA COUNTY MOSQUITO ABATEMENT DISTRICT

December 13<sup>th</sup>, 2023

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TIME: 5:00 P.M.  
PLACE: Hybrid Meeting of the Board of Trustees  
Physically held at the Office of the District  
23187 Connecticut Street, Hayward, CA 94545 and  
Teleconferencing at: <https://us02web.zoom.us/j/86094737471>  
TRUSTEES: Victor Aguilar, President, City of San Leandro  
Cathy Roache, Vice-President, County-at-Large  
Tyler Savage, Secretary, City of Alameda  
Robin López, City of Albany  
P. Robert Beatty, City of Berkeley  
Kashef Qaadri, City of Dublin  
Courtney Welch, City of Emeryville  
John Zlatnik, City of Fremont  
George Syrop, City of Hayward  
City of Livermore, vacant  
Eric Hentschke, City of Newark  
Jan O. Washburn, City of Oakland  
Hope Salzer, City of Piedmont  
Valerie Arkin, City of Pleasanton  
Subru Bhat, City of Union City

1. Board President Aguilar called the regularly scheduled board meeting to order at 5:01 pm.
2. Trustees Aguilar, Roache, Savage, López, Beatty, Qaadri, Zlatnik, Syrop, Hentschke, Salzer, Arkin and Bhat were present in-person at the district. Trustees Welch and Washburn were absent.
3. President Aguilar invited members of the public to speak on any issue relevant to the district. Vikki Rodrigues from Maze & Associates was present remotely for Item 6. Financial & HR Specialist, Michelle Robles, was present for Item 6. Laboratory Director, Eric Haas-Stapleton, was present for Item 7. Vector Biologist, Sarah Lawton, was present to record the minutes. Information & Technology Director, Robert Ferdan, was present for technical support.
4. Introduction of new Board Member Mr. John Zlatnik, representing the City of Fremont.  
**Discussion:** Trustee Zlatnik said that he is delighted to be here, and so far, this seems like a quality place. President Aguilar welcomed him to the Board.
5. Approval of the minutes of the 1119<sup>th</sup> meeting held November 8<sup>th</sup>, 2023.  
**Discussion:** None  
**Motion:** Trustee Syrop moved to approve the minutes

**Second:** Trustee Arkin

**Vote:** motion carries: unanimous

6. Presentation of the Draft Annual Comprehensive Financial Report for the Fiscal Year 2022-23 by Maze & Associates

**Discussion:** Vikki Rodriguez gave a presentation on the audit and answered questions along with Michelle Robles and the General Manager. Trustee Qaadri asked which liability was overfunded for 2022-23 by about 2 million, when will we no longer be over-funded? (OPEB is \$1.2 million over-funded. Liability is based on actuarial evaluation with current employees and retirees which will change annually, so it is still good to set money aside into OPEB. The pension, through CalPERS, is part of a cost-sharing pool and each year the percentage of long-term liability changes. Last years' liability was about 2 million, when the investments were doing well, but now the investment values are lower) and followed up by asking if the \$4.6 million unfunded liability is from this year (the CalPERS valuation report measures one year behind, so June of 2022). The General Manager added that the Board decided years ago to prioritize funding a Section 115 Trust rather than being 100% funded with CalPERS. Trustee Salzer asked to clarify what we are over-funded for? (Over-funded for OPEB, under-funded for CalPERS.) Trustee Bhat asked how to quantify a "danger level" for "under-funded". (Most organizations are under-funded, and "danger" would be not making contributions into CalPERS. It is a very complex calculation estimation.) President Aguilar asked about a net income (this is a typo that Vikki Rodriguez will correct in the final draft.) Trustee Qaadri asked what the capital outlay is (capital projects) and asked what would be "material", vs what would be "non-material" (calculation on assets and revenues based on risk, such as unrecorded liabilities, cash, investments, payrolls, disbursements, and bank statements) Trustee Savage asked about the custodial credit risk (if all funds are in one bank account, that would be concerning, or if using a bank that is not well-known.) Trustee Bhat asked about the comment that mentions difficulties in performing the audit, were there any difficulties (no). Trustee Qaadri asked how the District compares to other districts regarding transparency and fairness (the district is rare in receiving a GFOA financial reporting award, which requires more depth in reporting requirements).

**Motion:** Trustee Beatty moved to accept the audit report

**Second:** Trustee Hentschke

**Vote:** motion carries: unanimous

7. Presentation by Lab Director, Eric Haas-Stapleton, PhD: *Tropical disease & Aedes aegypti response plan*

**Discussion:** Trustee Bhat asked about the Western malaria mosquito, are they not found in India (not this species.) Trustee Qaadri asked what we think made the *Aedes aegypti* spread in the way they did (perhaps but they did not anticipate the mosquitoes using industrial structures such as underground sewer systems to thrive in many more habitats than expected.) President Aguilar asked what does VB/MCT stand for (Vector Biologist/Mosquito Control Technician, aka the Operations staff.) Trustee Salzer asked about the mention of a committee for emergency response and who is on the committee. (It is an Ad Hoc committee that is formed when needed.) She also asked how far we would spread the door-to-door inspections (start with a 50-meter perimeter, then extend from there as needed) and does the District do this now with the few positive human cases (yes, but not the door-to-door inspections.) Trustee Qaadri asked about CERT, how would we activate (Mark Wieland, Mechanical Specialist, is our Emergency Coordinator and has contacts with the County EMA and CERT organizers). Trustee Salzer

asked if we still receive reports by fax? (No, but the letterhead in the encrypted email still says, "Fax Cover Sheet"). Trustee Zlatnik asked if there have been any local transmissions of Dengue in California? (Yes, earlier this year there was one in Pasadena and one in Long Beach) Trustee Bhat asked if there has been Dengue transmission in any other state? (Yes, TX, AZ, FL & LA (added by Trustee Beatty)).

8. Trustee in lieu payments switching from 1099 to W-2 in January 2024

**Discussion:** No questions from the Board. Michelle Robles just reminded them to contact her with the needed information.

9. Closed session to discuss the General Manager's compensation pursuant to Government Code Section 54957.6

**Discussion:** No report out of closed session.

10. Financial Reports as of November 30<sup>th</sup>, 2023:

**Discussion:** Michelle Robles presented the financial report. Trustee Salzer asked how long the CalPERS lump sum payment is for? (the whole year for the unfunded liability, but we still make monthly payments.)

11. Presentation of the Monthly Staff Report.

**Discussion:** The General Manager and Eric Haas-Stapleton presented the staff report. Trustee Beatty asked why there are more *Cx. pipiens*, than *Cx. tarsalis* (seeking shelter for overwintering.)

12. Presentation of the Manager's Report

**Discussion:** Trustee Arkin asked if AB 1234 is the Ethics training? (Yes.) She followed up by asking if she completes this training for her regular job, will that apply here? (Yes, you only need to complete the training once.)

13. Board President asks for reports on conferences and seminars attended by Trustees.

**Discussion:** Trustee Beatty attended the Pan-Dengue conference in Peru, which had many presentations about mosquitoes.

14. Board President asks for announcements from members of the Board.

**Discussion:** The General Manager reminded everyone that he will be off during the holidays but will return by the next Board meeting. Trustee Roache asked when the new Officers' roles will be taken, such as Secretary moving up to Vice-President (the officers will change after the election during the January meeting.)

15. Board President asks Trustees for items to be added to the agenda for the next Board meeting.

**Discussion:** Trustee Arkin asked what conference is coming up? (The MVCAC will be 1/22-1/22.) Trustee Qaadri mentioned his idea of a mosquito app and would like to discuss it further.

16. Adjournment at 6:38 pm.

**Respectfully submitted,**

Approved as written and/or corrected  
at the 1120<sup>th</sup> meeting of the Board of  
Trustees held January 10<sup>th</sup>, 2024

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President  
BOARD OF TRUSTEES

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Secretary  
BOARD OF TRUSTEES

## MINUTES

### SPECIAL MEETING OF THE BOARD OF TRUSTEES OF THE ALAMEDA COUNTY MOSQUITO ABATEMENT DISTRICT

#### STRATEGIC PLANNING WORKSHOP

DECEMBER 13<sup>TH</sup>, 2023

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TIME: 5:00 P.M.  
PLACE: Physically held at the Office of the District  
23187 Connecticut Street, Hayward, CA 94545  
TRUSTEES: Victor Aguilar, President, City of San Leandro  
Cathy Roache, Vice-President, County-at-Large  
Tyler Savage, Secretary, City of Alameda  
Robin López, City of Albany  
P. Robert Beatty, City of Berkeley  
Kashef Qaadri, City of Dublin  
Courtney Welch, City of Emeryville  
John Zlatnik, City of Fremont  
George Syrop, City of Hayward  
City of Livermore, vacant  
Eric Hentschke, City of Newark  
Jan O. Washburn, City of Oakland  
Hope Salzer, City of Piedmont  
Valerie Arkin, City of Pleasanton  
Subru Bhat, City of Union City

1. Board President Aguilar called the Special Meeting to order at 4:10 P.M.
2. Trustees Aguilar, Roache, Savage, López, Beatty, Qaadri, Zlatnik, Syrop, Hentschke, Salzer, Arkin and Bhat were present in-person at the district. Trustee Savage arrived at 4:05 P. M. Trustees Welch and Washburn were absent.
3. Board President Aguilar invited members of the public to speak on any issue relevant to the district. Former ACMAD District manager John Rusmiser participated in the strategic planning workshop as a member of the public.
4. Each of the five Trustee Groups were placed in a Staff Group (by department) for five, ten-minute presentations.

The recorded minutes of each Staff Group are as follows:

#### **Operations Room:**

Field Operations Supervisor Joseph Huston presented Operations Strategic Plan 2024-2027 Goals and fielded the following discussion. Vector Biologists Neil Campbell, Sarah Lawton, Nick Appice, Erick Gaona, Ben Rusmiser, and Mosquito Control Technicians Alex Roache and Danny Sharkey were also in attendance.

#### **Discussion:**



Trustee Beatty requested comparisons of hours spent on sites treating with and without drone applications (agreed). Trustee López asked about historical problems with contacting Lawrence Livermore National Laboratories (high turnover causes inconsistent contacts). President Aguilar asked how many batteries we have for the drone (six). Trustee Salzer asked how technicians can identify problems with equipment during treatments (constant inspections during applications). Vice-President Roache asked if our drones will be used for aerial imagery (the recently acquired drone is built strictly for application purposes).

#### **HR/ Administration Room:**

General Manager Ryan Clausnitzer and Financial & HR Specialist Michelle Robles presented their 2024-2026 Strategic Plan for Finance/Administration Goals and fielded the following discussion.

#### **Discussion:**

After Trustee Bhat gave a background on the process of the strategic plan, Trustee Zlatnik asked about the history of seasonal employees (we generally hire two for the lab and two for operations). Trustee Bhat asked if the DEI would be a part of policy (yes, it will go to the board after a review by the Ad Hoc Policy Committee) and asked if the succession plan would be for all positions (in general, yes, but with a more immediate focus on support staff with upcoming retirements). Trustee Zlatnik expressed that he feels we respond to and represent the community well. Trustee Arkin provided feedback on the strategic plan process and expressed that she enjoyed being part of the committee. Trustee Qaadri asked for clarification on salaried employees receiving overtime (non-exempt employees are eligible to receive ETO for hours worked over 40 or they have the option to flex the time out) and asked if the clock in/out is being utilized to breakdown employees' different tasks (no) and expressed that he is happy to see the DEI on the plan for 2025. President Aguilar mentioned that there will likely be a bill introduced at the State recognizing Lunar New Year as a holiday. Trustee Syrop asked if employees could keep their current holidays as well as the two additions (adding an additional holiday was not approved by the Board in 2021 as the number of holidays is higher than most comparable agencies, so the alternative approach of swapping holidays is now being explored) and expressed that he would prefer to switch out the floating holiday. Trustee Syrop asked how long seasonals stay on (6 months, generally May – October) and asked what education background are required for seasonal employment (High School degree at a minimum, college students or graduates are preferred). President Aguilar mentioned that in San Leandro, an HR consultant has hired to review the job descriptions (yes, a likely outcome). Trustee Syrop mentioned that he agrees that it is more respectable to remove the clock in/out. President Aguilar asked if that is for non-exempt employees (yes) and how we plan on keeping track of employee's time (employees and supervisors are to keep track of their time). Trustee Beatty expressed that he didn't find the holiday switch to be a strategic priority (the change requires board action, will require sacrifices for staff, and fits into our goal of inclusivity) and asked if the field operations position will change as part of the succession planning (yes, which will be looked at based on the needs at that time). Trustee Salzer mentioned that the other departments have similar goals (some goals overlap within different departments and are worked on by several individuals). Trustee Salzer suggested formatting the years on an x-axis as that would be helpful for clarity (we will work with the designer on incorporating that suggestion).

### **Laboratory Room:**

Lab Director Eric Haas-Stapleton, Vector Scientist Dereje Alemayehu, and Associate Vector Scientist Miguel Barretto presented the Laboratory 2024-2026 Strategic Plan Goals and fielded the following discussion.

### **Discussion:**

Trustee Beatty commented that Trustee Washburn previously mentioned malaria habitats in our county are not a high priority (while malaria may habitats not be a priority now, Dereje's work in Africa is tying in with what we want to try here), he also mentioned his previous work with people who have done mosquito education work in South America (yes, the MATE project is partnering with a local university, training people on larval sampling and education to collect pre-intervention data to evaluate success), he asked what "assess the alignment" meant as it's not currently clear (yes, we will can propose that change). Trustee López asked if there were plans to make the digital resource available in county libraries as not everyone has access to computers in their homes (good idea). Trustee Beatty asked if the idea is to provide website access (yes, possibly as an app as well). Trustee López asked if staff I had worked with AI previously (yes) and then mentioned that a colleague in his freshwater ecology group is using R and AI processes to identify fish species (there was a soft launch of a similar project with Biohub). Trustee Hentschke appreciates the explanation of the goals by lab staff (thank you, the goals follow a path of starting locally, going regionally, then finally thinking internationally). Trustee Syrop asked about plan development (goals were presented to management who then developed, with staff, three umbrellas to work under). President Aguilar asked how we include non-English speaking residents in our efforts (while translating our lab report may not be very useful, staff is always looking for ways to spread public awareness). Trustee Syrop asked what website documents can be translated (we are looking at translating most materials). President Aguilar added city council documents are translated from English into Spanish, Tagalog, Cantonese, Vietnamese, Ilocano and they also hire translators for public comment. Trustee Syrop added that Mandarin, Tagalog, and Spanish are what the county translates for ballots and perhaps their translated criteria can be duplicated. President Aguilar mentioned that the lab may want to investigate a heat map to find areas that need extra attention (yes, this is already a resource that the laboratory has). Trustee Syrop asked if community relations be made explicit in the strategic plan (yes, the lab can suggest that). Trustee Hentschke asked if lab reports are produced in other languages (currently, no). President Aguilar added that AI could help in these endeavors. Trustee Syrop added some startups provide that service as well. Trustee Salzer stated that the strategic goals would be easier to understand if goals were put in an x-axis timeline (will pass on those comments) and asked if the lab has evaluated malaria mosquitoes based on habitat in the county (the lab has looked at trap results but not yet habitat), and said that if the MATE partners use the same malaria control protocols, one could collect results and compare. Trustee Bhat asked if untranslated documents are currently an issue (past studies have indicated that service gaps may stem from language issues and public engagement, a goal of this plan). Trustee Zlatnik asked that with climate change and with diseases are showing up in new areas, what do we have in our area vs. Southern California (dengue is transmitted by *Aedes aegypti* and *Aedes albopictus* which has been found around us, but while we don't currently have these species, we are performing extensive monitoring and response plans for their arrival), he also asked if we have the vector but not the disease ( the other way around: we have the disease (travel-related), but not the vector). Trustee Bhat asked if there were recent invasive mosquito detections (no). Trustee Zlatnik asked what you look for in birds (West Nile, St. Louis, and western equine encephalites viruses and communicated the means through

which we hear about birds) and said that he was surprised anybody knows about this fact (yes, public awareness is an important challenge). Trustee Bhat asked what the goal was with rural Africa communities (described the work of MATE and how other countries in attendance at PAMCA are following closely). Trustee Zlatnik asked if there are any other countries involved (Kenya, due to a connection with Kenyan-born and current District Manager of East Side Mosquito Abatement District, Wakoli Wekesa). Trustee Bhat remarked that this is important work as malaria is very common there. Trustee Zlatnik added a child dies of malaria with great frequency. Trustee Qaadri asked about the goal of helping the African community, what about the reverse in terms of their response of tropical vectors coming our way (we'd like to learn inexpensive approaches to deal with tropical disease control that we don't currently use and the work with the MATE project aims to work closely with rural African communities). Trustee Arkin asked what a digital resource would look like (a web interface that would assist clients with information about possible mosquitoes in their area and potentially grow out into an AI model that would automatically identify them by a given photo and provide relevant information). Trustee Qaadri offered the lab to be a resource with AWS because he has inroads to assist and added the possibility to use captcha adjacent work to have the public ID mosquitoes as this could educate the public while also providing information.

#### **Outreach and Regulatory Room:**

Regulatory & Public Affairs Director Erika Castillo & Public Outreach Coordinator Judith Pierce presented the Outreach and Regulatory 2024-2026 Strategic Plan Goals and fielded the following discussion.

#### **Discussion:**

Trustee Qaadri asked if there is a goal to evaluate environmental impact and has that never been done before (many goals are continuations of long-standing projects including reviewing and determining best practices in pesticide management and alignment with CEQA standards and US FW requirements), and asked what does the partnership between CDPH and ACPHD look like (clarified the relationship between the agencies and ACMAD). Trustee Arkin asked what communication looks like between ACMAD and the public if there are diseases and invasive mosquitoes (detailed the relationship and response plan and that while we do not have invasives now, we are strengthening those relationships). President Aguilar asked to clarify the community outreach goals in the context of climate change (most goals are built upon prior work and expansion of our mission and vision for the district), how is the district targeting people of color and English language learners (highlighted existing outreach goals and the incoming addition of a bilingual outreach worker and that staff acknowledges the major need for language services and translation for district materials and what entities would be strategic to partner with, including the Promotoras of Tiburcio Vasquez Health Center and Community Health Liaison's for Asian Health Services. Trustee Syrop recommended the top 10 pages on the website to be translated into the main four languages spoken in the county (yes). Trustee Beatty reflected on the remarkable ambition and laudable goals for this small but mighty team and then asked when the district engages with US Fish and Wildlife, who from the district is actually talking (the point people for various situations was explained). Trustee López commented that it was important to empower youth with a sense of agency and urgency when it comes to the climate crisis and how the district is doing this and how the district is engaging with recent immigrants (strategic community outreach and deepening relationships with community organizations in low-income areas) he then recommended reaching out and potentially presenting to the American Geographical Union about our work. Trustee

Salzer asked about proactive invasive *Aedes* communication (as many entities will often incorrectly combine invasive *Aedes* with native *Aedes*, our messaging about invasive *Aedes* is limited to MVCAC messaging along with incorporating messaging on invasives in school-based education and events. John Rusmiser remarked that climate change has affected the coastline and many levees have been breached since his retirement. Trustee Zlatnik asked where the district receives information about climate change (our various professional associations and collaborations). Trustee Bhat questioned why certain goals are in 2025 and not 2024 (certain goals need more groundwork before we can concentrate on them, and the new hire will take a fair bit of bandwidth to support and train), asked if the new hire will be in the lab as well as Ops (the new hire will be focused on invasive *Aedes* and will therefore need to know about all aspects of the program to develop skills that help contain invasive spread, which would include a few aspects of lab work as well). Trustee Zlatnik offered his educator background to help support curriculum development for the education program (yes, and the program has changed over the past two years to better meet needs of teachers and to accommodate for the large amount learning loss in school aged children due to COVID 19 school disruptions).

**Equipment/IT Room:**

Mechanical Specialist Mark Wieland and Information Technology Director Robert Ferdan presented the respective Equipment and IT Strategic Plan 2024-2027 goals and fielded the following discussion.

**Discussion:**

Trustee John Zlatnik asked how many fish we use per year (an average of 45 lbs. purchased, 400 SR's/Fish Requests, averaging 6-25 fish per request) and inquired on how photos of pools are obtained for the Pool Surveillance Program (fly-overs and satellite imagery). Trustee Bhat asked about the co-op between NearMap and MapVision (unfortunately, NearMap services are no longer available). Trustee Zlatnik asked how the pool evaluation process worked (explained the BI/AI process followed up with hands on inspections of photos and physical site). Trustee Qaadri asked to elaborate on equipment replacements with electric alternatives (gas-powered equipment will be replaced when a ZEV alternative is available). Trustee Arkin asked if there are laws in place to mandate swimming pool up-keep (there are a few regulatory maintenance guidelines in place that may do more harm than good). Trustee Kashef asked about the pool imagery process (explained). Board President Aguilar asked about our involvement with pool maintenance and our pool program (explained). Trustee Syrop asked about translation issues with our pool program notifications (with 100% voluntary compliance, there has been no apparent issues, but that suggestion is aligned with this proposed plan), asked about drone use for imagery (no drones are used in the imagery process), and added that he has connections with the Hayward Executive Airport that may be helpful with potential aerial imagery. Trustee Beatty asked about battery storage with our solar (that will be considered) and asked about the sustainability of the flyovers for the pool program (options need to be constantly explored as the program is required, aerial imagery has been unreliable).

5. The Special Meeting adjourned at 5:10 P.M.

**Respectfully submitted,**

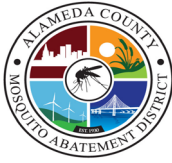
Approved as written and/or corrected  
at the 1120<sup>th</sup> meeting of the Board of  
Trustees held January 10<sup>th</sup>, 2024.

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President  
BOARD OF TRUSTEES

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Secretary  
BOARD OF TRUSTEES



# ACMAD Calendar 2024

**January**

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

**February**

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25	26	27	28	29		

**March**

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31						

**April**

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14	15	16	17	18	19	20
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28	29	30				

**May**

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26	27	28	29	30	31	

**June**

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16	17	18	19	20	21	22
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30						

**July**

S	M	T	W	T	F	S
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7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

**August**

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11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

**September**

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29	30					

**October**

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27	28	29	30	31		

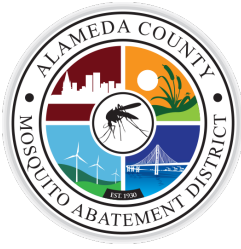
**November**

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**December**

S	M	T	W	T	F	S
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15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

- Board Meetings
- Holidays
- MVCAC Annual Conference
- AMCA Annual Conference
- CSDA Annual Conference
- Conflict between CSDA conference & ACMAD meeting



23187 Connecticut Street  
Hayward, CA 94545

T: (510) 783-7744  
F: (510) 783-3903

[acmad@mosquitoes.org](mailto:acmad@mosquitoes.org)

## Standing Finance Committee Assignments for 2024

### Board of Trustees

#### *President*

Victor Aguilar

#### **San Leandro**

#### *Vice-President*

Cathy Roache

#### **County-at-Large**

#### *Secretary*

Tyler Savage

#### **Alameda**

Robin López

#### **Albany**

P. Robert Beatty

#### **Berkeley**

Kashef Qaadri

#### **Dublin**

Courtney Welch

#### **Emeryville**

John Zlatnik

#### **Fremont**

George Syrop

#### **Hayward**

*vacant*

#### **Livermore**

Eric Hentschke

#### **Newark**

Jan O. Washburn

#### **Oakland**

Hope Salzer

#### **Piedmont**

Valerie Arkin

#### **Pleasanton**

Subru Bhat

#### **Union City**

#### **Ryan Clausnitzer**

*General Manager*

### **Background:**

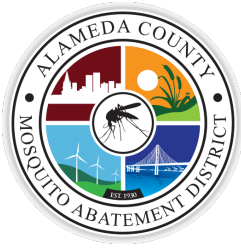
Per District policy 109.2, "*Finance committee members shall serve terms that are coterminous with that of the Board President*". In November of 2021, the Board adopted section 109.2(d) to District Policy which states that the Finance Committee will "*annually select a Chair from among its members that will report out to the full Board at a posted meeting.*"

### **Finance Committee**

**Purpose:** The Finance Committee is a standing committee tasked with reviewing the annual budget, assessing the District's long-term capital needs, making recommendations for designating reserves, and evaluating the allocation of the OPEB Trust.

**Current membership:** Bhat, Roache, Hentschke, Qaadri

**ACTION:** Confirm committee membership, set upcoming meeting dates, and appoint a Chair for 2024.



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## Board of Trustees

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Subru Bhat

### **Union City**

### **Ryan Clausnitzer**

*General Manager*

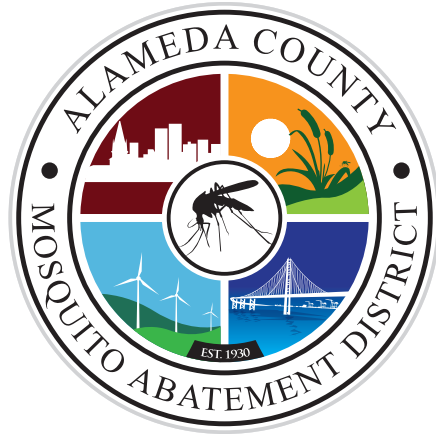
## ACMAD Policy Update 2024

Staff is currently reviewing policies to update, focused mostly on updating job titles along with some clean-up language to match policy with practice. After scheduling a meeting with an *ad-hoc board sub-committee*, we hope to have the 1<sup>st</sup> reading at the March Regular Board meeting.

This is step 1 of the policy revision process (**bolded below**):

1. Form an ad-hoc Policy Review Committee
2. The General Manager determines which policies may be out of compliance, drafts revisions, and has those revisions reviewed by an HR consultant.
3. This draft is shared with supervisory staff for comments.
4. That update is then shared with the ad-hoc board sub-committee on policy for review.
5. Any changes are reviewed by the ACMAD Employee Association.
6. If changes are requested by the employee association, step 3 is repeated. If no changes are suggested, that agreed upon draft is placed in the Board packet for the 1<sup>st</sup> Board reading.
7. If changes are requested at the Board meeting, steps 3-4 are repeated, if no changes are made, the policies are placed in the following Board packet for a 2<sup>nd</sup> reading and adoption by the Board of Trustees.
8. The updated policies are then provided to staff and posted to the website.





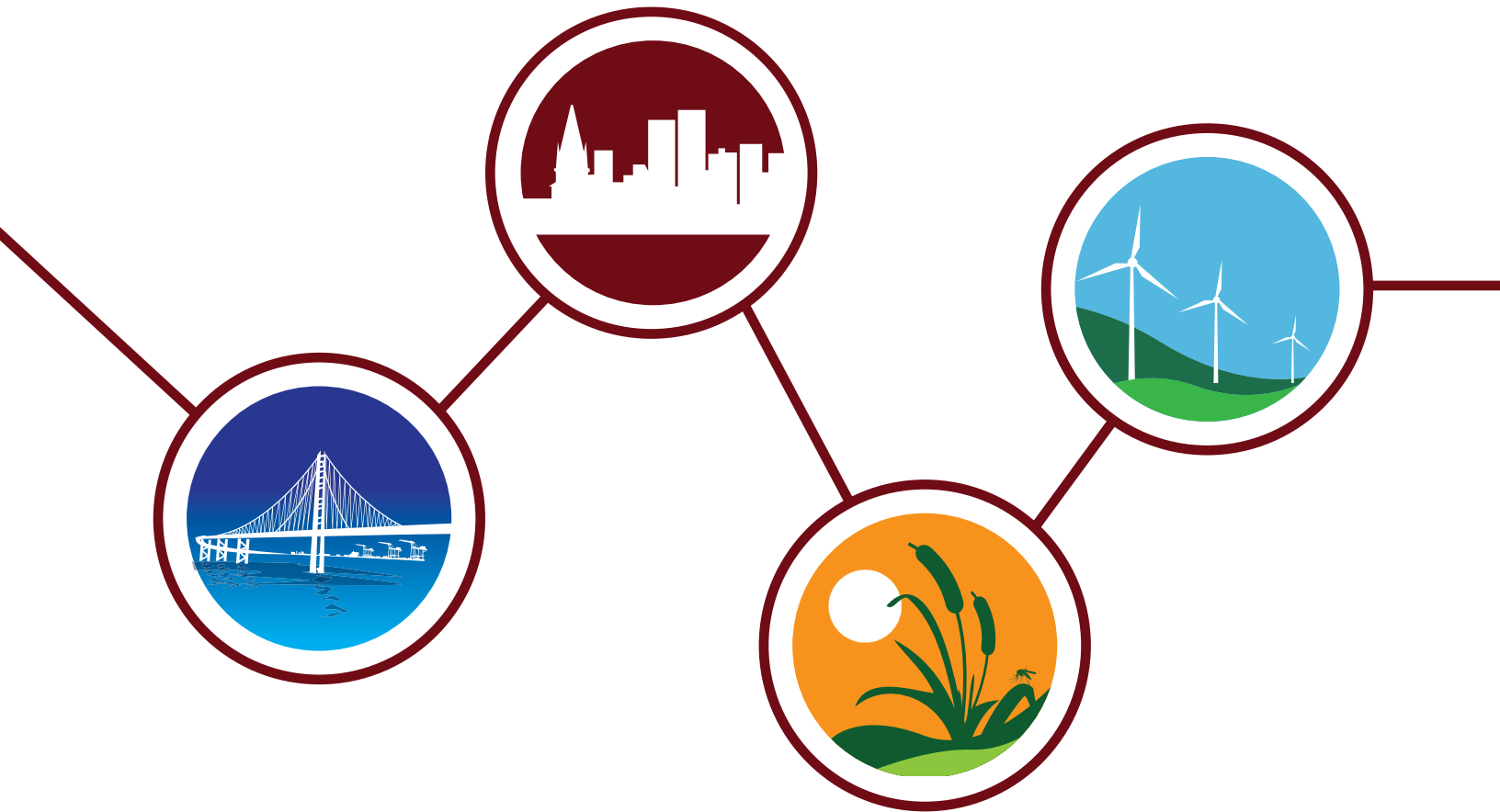
# ALAMEDA COUNTY MOSQUITO ABATEMENT DISTRICT

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# STRATEGIC PLAN

2024-2026

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## EMPLOYING A STRATEGIC ADVANTAGE

This third strategic plan in the Alameda County Mosquito Abatement District's (ACMAD) 93-year history prepares for known obstacles to our district's mission while striving to achieve our ambitious vision through its strategic priorities and associated projects. ACMAD elects to conduct this strategic planning process every three years so that our stakeholders—both internal and external—are aware of and can contribute to the direction of our actions. The district uses a 3-year cycle to ensure that our goals are achievable, measurable, and timely. The goals should anticipate challenges while providing a solid foundation with the flexibility to adjust.

Before introducing the 2024-2026 goals, it is necessary to review the status of the 2021-2023 Strategic Report with its three overarching goals:

- Ensure ACMAD has the training, equipment, personnel, partnerships, and financial support to limit the introduction of invasive *aedes* mosquitoes.
- Leverage ACMAD assets towards efficient approaches to mosquito control.
- Employ the best practices for mosquito control districts and local governments.

The district completed all seven projects listed under the first goal that prepared the district for invasive *Aedes* mosquitoes. These preparations include an internal parcel inspection plan for a door-to-door response, a Community Emergency Response Plan in coordination with the County's Emergency Managers Association, and a formal identification training process led by the district's laboratory. In year two, we began implementing

our school-age educational program while modeling the dispersal of our Wide Area Larvicide System in a marsh setting. By the final year of this report, field staff improved their ability to identify adult mosquitoes while lab staff submitted a research publication detailing a new rapid assay that identifies *Aedes* mosquitoes.

There were 25 projects under the broad category of leveraging assets towards efficient approaches. Of these projects, 20 were completed, 3 were dropped, and 2 were carried over to the next plan. The dropped projects focused on technology upgrades that were found to be unnecessary (e.g., replacing iPads and Virtual Desktops) and recoating the shop floor. The carried-over projects are related to the aquaculture facility which we had hoped to build in 2022; this goal has been delayed until 2024. The twenty completed projects include improvements to the credit card process, IT infrastructure, 3D printing capabilities, exterior painting, parking lot enhancements, Microsoft SharePoint sites, software and data storage, digitizing fleet processes, source reduction data, professional development, dashboards, reserve funding, and increased use of unmanned aircraft systems.

All fifteen of the district's projects in the strategic plan related to best practices were completed between 2021-2024. District staff improved the quality of the Comprehensive Annual Financial Report and annual budget, noticed improved methods in all Alameda County cemeteries, created new connections with community groups as well as state and local government officials, reclassified the Accounting Association position to a Financial & HR Specialist, determined when the district



will withdraw from the section 115 pension stabilization fund, began research on predictive modeling methods, developed new relationships within the educational community, improved salt marsh mosquito methods, and finally, implemented operational improvements recommended through a third party health equity research project.

The projects associated with each priority in this strategic plan begin from the broadest perspective (what improvements can we make for the environment?), to a community-based focus (how can we improve our external programs and relationships?), and end with an internal focus (how can we improve the way we operate?). This district-community-global systemic approach to mosquito control allows ACMAD to address the connection between our internal programs for mosquito controls, such as transitioning from fossil fuels, to increased tropical human diseases in Alameda County due to the climate crisis.

This strategic plan is a product of the collaboration between the ACMAD Board of Trustees and the ACMAD staff. With honest input from both parties a plan was devised to implement the Board's vision. Finally, thank you residents of Alameda County for trusting us to safeguard your health and comfort by controlling mosquitoes and limiting the transmission of mosquito-borne diseases.

Sincerely,  
 The Ad Hoc Strategic Planning Committee:  
 Trustee Valerie Arkin,  
 Trustee P. Robert Beatty,  
 Trustee Hope Salzer,  
 Trustee Jan O. Washburn, and  
 Trustee Subru Bhat, Committee Chair





## OUR STRATEGY

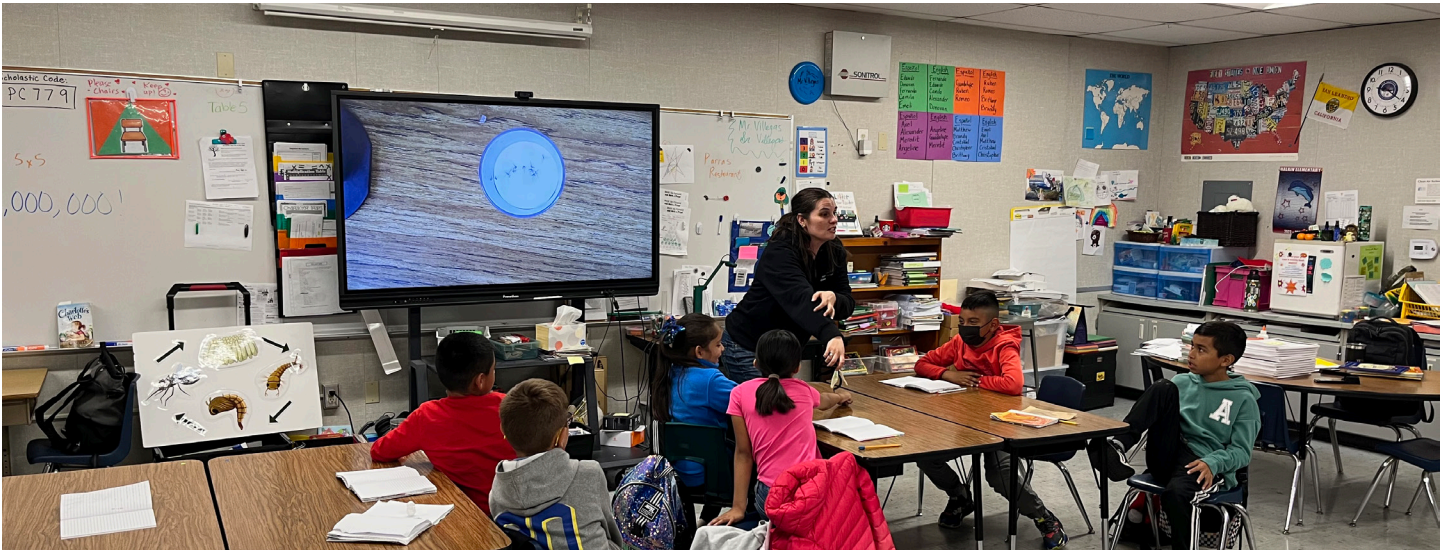
### OUR MISSION

Alameda County Mosquito Abatement District is committed to improving the health and comfort of Alameda County residents by controlling mosquitoes and limiting the transmission of mosquito-borne diseases.

### OUR VISION

To serve all residents of Alameda County in a transparent and equitable manner by providing knowledge-driven and environmentally-conscious mosquito control. We strive to provide an exemplary model of good government through fiscal transparency and accountability, and community outreach.





## OUR CORE VALUES

### ENVIRONMENTAL STEWARDSHIP

- Ecologically responsible
- Proactive in environmental legislation
- Responsive to environmental changes
- Emphasis on biorational treatments for mosquito control

### KNOWLEDGEABLE

- Science-based decision making
- Data-driven
- Technology enabled
- Safety program adherent

### PROFESSIONAL

- Honest
- Reliable
- Respectful
- Responsive
- Committed
- Inclusionary
- Accountable

## ENVIRONMENTAL SCAN

An Environmental Scan is a self-assessment process that allows organizations to identify their internal and external strengths, weaknesses, and foreseeable changes that may impact service delivery.

### STRENGTHS

- Data sharing and integration of laboratory and operations
- Larval-based control program
- Financial stability and accountability
- Timely responses to public request for service
- Public accessibility to staff and District information
- Culture of independence that fosters effective collaboration
- Innovative methods to monitor mosquito abundance

### WEAKNESSES

- Limited mosquito control products
- Limited ability to increase scale of operations in short amount of time
- Low diversity of revenue sources

### FORESEEABLE CHANGES THAT MAY IMPACT SERVICE DELIVERY

- Climate change
- Insecticide resistance
- Changes in regulations
- Human population growth
- Introduction of invasive mosquito species
- Emerging mosquito borne infectious diseases
- Natural disasters

# ACMAD 2024-2026 STRATEGIC PRIORITIES

Proactively mitigate and adapt to climate change impacts on ACMAD by reducing carbon emissions, planning for climate extremes, and coordinating with stakeholders.

## 2024

- Transition three treatment sites from ground-based equipment to Unmanned Aircraft Systems (UAS) for larval mosquito control applications in environmentally sensitive areas.
- Transition from purchasing mosquito fish from a 3rd party supplier to rearing at least 50% in-house.
- Deliver a report to the Board of Trustees on future self-sustainable energy requirements and budget for service upgrades.
- Evaluate the environmental impact of mosquito control products and equipment that are not included in our Programmatic Environmental Impact Report.

## 2025

- Purchase fully electric alternatives, if available, to gasoline-powered equipment (ATV, blowers, vehicles, boat), when replacement is needed.
- Geolocate malaria mosquito habitats in the county and update the response plan for travel-related cases of tropical diseases that are reported by public health departments.
- Engage with US Fish Wildlife Services to understand the limitations on the use of Unmanned Aircraft Systems on the properties they manage.
- Ensure projects that will help the shoreline be more resilient to climate change impacts include in the design and monitoring plan language that addresses the risks of mosquito production.

## 2026

- Report to the General Manager a cost-benefit analysis of purchasing an electric forklift rather than rely upon oversized lift-gate trucks to receive large product deliveries.
- Transition from ground-based larvicide applications to UAS on US Fish and Wildlife Services properties.
- Leverage our mosquito control expertise to aid rural African communities facing malaria challenges, thereby fostering global disease vector management practices that can inform and enhance climate adaptation strategies in Alameda County.

## Broaden our presence and depth of service to the community by supporting field staff efficiency and leveraging outreach.

### 2024

- Contract with a provider to acquire aerial imagery for the unmaintained swimming pool program.
- Ensure that at least 80% of the initial unmaintained swimming pool communications are made by office staff so that field staff efforts are preserved for mosquito control.
- Quantify the number of requests for service from the community that are resolved through educational outreach by office staff.
- Hire a new full-time invasive *Aedes* field outreach position that also participates in operations and laboratory duties.

### 2025

- Implement an outreach strategy for members of the county that may be most affected by mosquito populations and diseases.
- Establish new agency partnerships that should be leveraged to amplify our mission of mosquito control.
- Develop a digital resource that enables the public and staff to identify mosquitoes and other insects that are common in the county.
- Provide Trustees with quarterly reports on mosquito control issues or updates that they bring to city council or supervisory meetings.
- Solicit quarterly reports from Trustees on land-use decisions that may affect mosquito production.

### 2026

- Ensure that at least half of our new agency partners have deployed community messages that amplify our mosquito control mission.
- Quantify differences in water and soil composition in pickleweed habitats that are used or avoided by *Aedes dorsalis*, and report outcomes in scientific publication and conference presentation.
- Develop a collaborative mosquito control strategy with Lawrence Livermore National Laboratory or other similarly restricted sites.



## Ensure that we provide residents and visitors to Alameda County with effective, inclusive, and efficient mosquito control.

### 2024

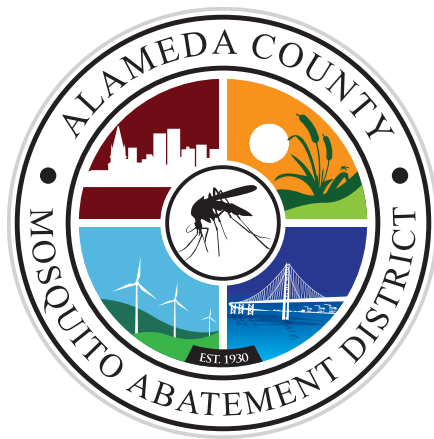
- Update the district holiday schedule to align with federal and state holidays that reflect our communities' values.
- Revise the seasonal employee job description and recruitment strategy to ensure a fully staffed district.
- Increase workplace professionalism by transitioning permanent employees out of hourly clock requirements.
- Deploy the new Mapvision 3.0 geospatial data management system with a revised catch basin mapping system and new capabilities that are requested by staff and management.
- Improve cybersecurity practices by ensuring that data and systems are secure through annual vulnerability assessments, penetration testing, and automatic patching of district IT equipment.

### 2025

- Automate and review staff certifications and training requirements quarterly.
- Develop a written executive management commitment that documents the Districts dedication to diversity, equity and inclusion.
- Evaluate use of a larger granular pesticide spreader for land-based treatments.

### 2026

- Create succession plans for support staff positions.
- Assess the alignment of immature mosquitoes with adult mosquito abundance data.
- Evaluate and implement automation opportunities for routine tasks such as green pool identification, insect identification, and fleet management.



**510-783-7744**

 [www.mosquitoes.org](http://www.mosquitoes.org)

 Alameda County Mosquito Abatement District

 @AlamedaMosquito

***[www.mosquitoes.org](http://www.mosquitoes.org)***

**AMENDMENT**

**COVER PAGE**

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)

**1. Office, Agency, or Court**

Agency Name (Do not use acronyms)

Division, Board, Department, District, if applicable Your Position

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: \_\_\_\_\_ Position: \_\_\_\_\_

**2. Jurisdiction of Office (Check at least one box)**

State Judge, Retired Judge, Pro Tem Judge, or Court Commissioner (Statewide Jurisdiction)  
Multi-County \_\_\_\_\_ County of \_\_\_\_\_  
City of \_\_\_\_\_ Other \_\_\_\_\_

**3. Type of Statement (Check at least one box)**

Annual: The period covered is January 1, 2023, through December 31, 2023. Leaving Office: Date Left \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
-or- The period covered is \_\_\_\_/\_\_\_\_/\_\_\_\_\_, through December 31, 2023. (Check one circle.)  
Assuming Office: Date assumed \_\_\_\_/\_\_\_\_/\_\_\_\_\_. The period covered is January 1, 2023, through the date of leaving office.  
-or- The period covered is \_\_\_\_/\_\_\_\_/\_\_\_\_\_, through the date of leaving office.  
Candidate: Date of Election \_\_\_\_\_ and office sought, if different than Part 1: \_\_\_\_\_

**4. Schedule Summary (required)**

► Total number of pages including this cover page: \_\_\_\_\_

**Schedules attached**

Schedule A-1 - Investments – schedule attached Schedule C - Income, Loans, & Business Positions – schedule attached  
Schedule A-2 - Investments – schedule attached Schedule D - Income – Gifts – schedule attached  
Schedule B - Real Property – schedule attached Schedule E - Income – Gifts – Travel Payments – schedule attached

-or-

**None - No reportable interests on any schedule**

**5. Verification**

MAILING ADDRESS STREET CITY STATE ZIP CODE  
(Business or Agency Address Recommended - Public Document)

DAYTIME TELEPHONE NUMBER E-MAIL ADDRESS  
( )

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed \_\_\_\_\_ Signature \_\_\_\_\_  
(month, day, year) (File the originally signed paper statement with your filing official.)

# 2023-2024 Statement of Economic Interests



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## Form 700

A Public Document

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Schedule E ( <i>Travel Payments</i> ).....	p.17
Restrictions and Prohibitions.....	p.19
Q & A.....	p.20

### ***Helpful Resources***

- Video Tutorials
- Reference Pamphlet
- Excel Version
- FAQs
- Gift and Travel Fact Sheet for State and Local Officials

## California Fair Political Practices Commission

1102 Q Street, Suite 3050 • Sacramento, CA 95811

Email Advice: [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov)

Toll-free advice line: 1 (866) ASK-FPPC • 1 (866) 275-3772

Telephone: (916) 322-5660 • Website: [www.fppc.ca.gov](http://www.fppc.ca.gov)

December 2023

## Quick Start Guide

Detailed instructions begin on page 3.

### WHEN IS THE ANNUAL STATEMENT DUE?

- March 1 – Elected State Officers, Judges and Court Commissioners, State Board and Commission members listed in Government Code Section 87200
- April 2 – Most other filers

### WHERE DO I FILE?

Most people file the Form 700 with their agency. If you're not sure where to file your Form 700, contact your filing officer or the person who asked you to complete it.

### ITEMS TO NOTE!

- The Form 700 is a public document.
- Only filers serving in active military duty may receive an extension on the filing deadline.
- You must also report interests held by your spouse or registered domestic partner.
- Your agency's conflict of interest code will help you to complete the Form 700. You are encouraged to get your conflict of interest code from the person who asked you to complete the Form 700.

### NOTHING TO REPORT?

Mark the "No reportable interests" box on Part 4 of the Cover Page, and submit only the signed Cover Page. Please review each schedule carefully!

Schedule	Common Reportable Interests	Common Non-Reportable Interests
A-1: Investments	Stocks, including those held in an IRA or 401K. Each stock must be listed.	Insurance policies, government bonds, diversified mutual funds, funds similar to diversified mutual funds.
A-2: Business Entities/Trusts	Business entities, sole proprietorships, partnerships, LLCs, corporations and trusts. (e.g., Form 1099 filers).	Savings and checking accounts, cryptocurrency, and annuities.
B: Real Property	Rental property in filer's jurisdiction, or within two miles of the boundaries of the jurisdiction.	A residence used exclusively as a personal residence (such as a home or vacation property).
C: Income	Non-governmental salaries. Note that filers are required to report only half of their spouse's or partner's salary.	Governmental salary (from school district, for example).
D: Gifts	Gifts from businesses, vendors, or other contractors (meals, tickets, etc.).	Gifts from family members.
E: Travel Payments	Travel payments from third parties (not your employer).	Travel paid by your government agency.

**Note:** Like reportable interests, non-reportable interests may also create conflicts of interest and could be grounds for disqualification from certain decisions.

### QUESTIONS?

- [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov)
- (866) 275-3772 Mon-Thurs, 9-11:30 a.m.

### E-FILING ISSUES?

- If using your agency's system, please contact technical support at your agency.
- If using FPPC's e-filing system, write to [form700@fppc.ca.gov](mailto:form700@fppc.ca.gov).

## What's New

### Gift Limit Increase

The gift limit increased to **\$590** for calendar years **2023** and **2024**. The gift limit was \$520 for calendar years 2021 and 2022.

### Who must file:

- Elected and appointed officials and candidates listed in Government Code Section 87200
- Employees, appointed officials, and consultants filing pursuant to a conflict of interest code ("code filers"). **Obtain your disclosure categories, which describe the interests you must report, from your agency;** they are not part of the Form 700
- Candidates running for local elective offices that are designated in a conflict of interest code (e.g., county sheriffs, city clerks, school board trustees, and water board members)

#### Exception:

- Candidates for a county central committee are not required to file the Form 700
- Employees in newly created positions of existing agencies

For more information, see Reference Pamphlet, page 3, at [www.fppc.ca.gov](http://www.fppc.ca.gov).

### Where to file:

#### 87200 Filers

State offices	⇒	Your agency
Judicial offices	⇒	The clerk of your court
Retired Judges	⇒	Directly with FPPC
County offices	⇒	Your county filing official
City offices	⇒	Your city clerk
Multi-County offices	⇒	Your agency

#### Code Filers — State and Local Officials, Employees, and Consultants Designated in a Conflict of Interest

**Code:** File with your agency, board, or commission unless otherwise specified in your agency's code (e.g., Legislative staff files directly with FPPC). In most cases, the agency, board, or commission will retain the statements.

**Members of Newly Created Boards and Commissions:** File with your agency or with your agency's code reviewing body pursuant to Regulation 18754.

**Employees in Newly Created Positions of Existing Agencies:** File with your agency or with your agency's code reviewing body. (See Reference Pamphlet, page 3.)

#### Candidates file as follow:

State offices, Judicial offices and multi-county offices	⇒	County elections official with whom you file your declaration of candidacy
County offices	⇒	County elections official
City offices	⇒	City Clerk
Public Employee's Retirement System (CalPERS)	⇒	CalPERS
State Teacher's Retirement Board (CalSTRS)	⇒	CalSTRS

### How to file:

The Form 700 is available at [www.fppc.ca.gov](http://www.fppc.ca.gov). Form 700 schedules are also available in Excel format. Each Statement must have a handwritten "wet" signature or "secure electronic signature," meaning either (1) a signature submitted using an approved electronic filing system or (2) if permitted by the filing officer, a digital signature submitted via the filer's agency email address. (See Regulations 18104 and 18757.) Companies such as Adobe and DocuSign offer digital signature services. All statements are signed under the penalty of perjury and must be verified by the filer. See Regulation 18723.1(c) for filing instructions for copies of expanded statements.

### When to file:

#### Annual Statements

##### ⇒ March 1, 2024

- Elected State Officers
- Judges and Court Commissioners
- State Board and State Commission Members listed in Government Code Section 87200

##### ⇒ April 2, 2024

- Most other filers

Individuals filing under conflict of interest codes in city and county jurisdictions should verify the annual filing date with their filing official or filing officer.

Statements postmarked by the filing deadline are considered filed on time.

Statements of 30 pages or less may be emailed or faxed by the deadline as long as the originally signed paper version is sent by first class mail to the filing official within 24 hours.

#### Assuming Office and Leaving Office Statements

Most filers file within 30 days of assuming or leaving office or within 30 days of the effective date of a newly adopted or amended conflict of interest code.

#### Exception:

If you assumed office between October 1, 2023, and December 31, 2023, and filed an assuming office statement, you are not required to file an annual statement until March 1, 2025, or April 1, 2025, whichever is applicable. The annual statement will cover the day after you assumed office through December 31, 2024. (See Reference Pamphlet, page 6, for additional exceptions.)

#### Candidate Statements

File no later than the final filing date for the declaration of candidacy or nomination documents. A candidate statement is not required if you filed an assuming office or annual statement for the same jurisdiction within 60 days before filing a declaration of candidacy or other nomination documents.

#### Late Statements

**There is no provision for filing deadline extensions unless the filer is serving in active military duty. (See page 19 for information on penalties and fines.)**

#### Amendments

Statements may be amended at any time. You are only required to amend the schedule that needs to be revised. It is not necessary to amend the entire filed form. The amended schedule(s) is attached to your original filed statement. Obtain amendment schedules at [www.fppc.ca.gov](http://www.fppc.ca.gov).

## Types of Statements

### Assuming Office Statement:

If you are a newly appointed official or are newly employed in a position designated, or that will be designated, in a state or local agency's conflict of interest code, your assuming office date is the date you were sworn in or otherwise authorized to serve in the position. If you are a newly elected official, your assuming office date is the date you were sworn in.

- Report: Investments, interests in real property, and business positions held on the date you assumed the office or position must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the date you assumed the office or position.

For positions subject to confirmation by the State Senate or the Commission on Judicial Appointments, your assuming office date is the date you were appointed or nominated to the position.

- Example: Maria Lopez was nominated by the Governor to serve on a state agency board that is subject to state Senate confirmation. The assuming office date is the date Maria's nomination is submitted to the Senate. Maria must report investments, interests in real property, and business positions Maria holds on that date, and income (including loans, gifts, and travel payments) received during the 12 months prior to that date.

If your office or position has been added to a newly adopted or newly amended conflict of interest code, use the effective date of the code or amendment, whichever is applicable.

- Report: Investments, interests in real property, and business positions held on the effective date of the code or amendment must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the effective date of the code or amendment.

### Annual Statement:

Generally, the period covered is January 1, 2023, through December 31, 2023. If the period covered by the statement is different than January 1, 2023, through December 31, 2023, (for example, you assumed office between October 1, 2022, and December 31, 2022 or you are combining statements), you must specify the period covered.

- Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement must be reported. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2023.

- If your disclosure category changes during a reporting period, disclose under the old category until the effective date of the conflict of interest code amendment and disclose under the new disclosure category through the end of the reporting period.

### Leaving Office Statement:

Generally, the period covered is January 1, 2023, through the date you stopped performing the duties of your position. If the period covered differs from January 1, 2023, through the date you stopped performing the duties of your position (for example, you assumed office between October 1, 2022, and December 31, 2022, or you are combining statements), the period covered must be specified. The reporting period can cover parts of two calendar years.

- Report: Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2023.

### Candidate Statement:

If you are filing a statement in connection with your candidacy for state or local office, investments, interests in real property, and business positions held on the date of filing your declaration of candidacy must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the date of filing your declaration of candidacy is reportable. Do not change the preprinted dates on Schedules A-1, A-2, and B.

Candidates running for local elective offices (e.g., county sheriffs, city clerks, school board trustees, or water district board members) must file candidate statements, as required by the conflict of interest code for the elected position. The code may be obtained from the agency of the elected position.

### Amendments:

If you discover errors or omissions on any statement, file an amendment as soon as possible. You are only required to amend the schedule that needs to be revised; it is not necessary to refile the entire form. Obtain amendment schedules from the FPPC website at [www.fppc.ca.gov](http://www.fppc.ca.gov).

**Note:** Once you file your statement, you may not withdraw it. All changes must be noted on amendment schedules.

### Expanded Statement:

If you hold multiple positions subject to reporting requirements, you may be able to file an expanded statement for each position, rather than a separate and distinct statement for each position. The expanded statement must cover all reportable interests for all jurisdictions and list all positions on the Form 700 or on an attachment for which it is filed. The rules and processes governing the filing of an expanded statement are set forth in Regulation 18723.1.

**STATEMENT OF ECONOMIC INTERESTS  
COVER PAGE**  
*A PUBLIC DOCUMENT*

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)

**1. Office, Agency, or Court**

Agency Name (Do not use acronyms)

Division, Board, Department, District, if applicable Your Position

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: Position:

**2. Jurisdiction of Office (Check at least one box)**

State Judge, Retired Judge, Pro Tem Judge, or Court Commissioner (Statewide Jurisdiction)  
Multi-County County of  
City of Other

**3. Type of Statement (Check at least one box)**

Annual: The period covered is January 1, 2023, through December 31, 2023. Leaving Office: Date Left (Check one circle.)  
-or- The period covered is through December 31, 2023. The period covered is January 1, 2023, through the date of leaving office.  
Assuming Office: Date assumed -or- The period covered is through the date of leaving office.  
Candidate: Date of Election and office sought, if different than Part 1:

**4. Schedule Summary (required)**

► Total number of pages including this cover page:

**Schedules attached**

Schedule A-1 - Investments – schedule attached Schedule C - Income, Loans, & Business Positions – schedule attached  
Schedule A-2 - Investments – schedule attached Schedule D - Income – Gifts – schedule attached  
Schedule B - Real Property – schedule attached Schedule E - Income – Gifts – Travel Payments – schedule attached

-or- None - No reportable interests on any schedule

**5. Verification**

MAILING ADDRESS STREET CITY STATE ZIP CODE  
(Business or Agency Address Recommended - Public Document)

DAYTIME TELEPHONE NUMBER EMAIL ADDRESS  
( )

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed (month, day, year)

Signature (File the originally signed paper statement with your filing official.)



# Instructions Cover Page

Enter your name, mailing address, and daytime telephone number in the spaces provided. **Because the Form 700 is a public document, you may list your business/office address instead of your home address.**

## Part 1. Office, Agency, or Court

- Enter the name of the office sought or held, or the agency or court. Consultants must enter the public agency name rather than their private firm's name. (Examples: State Assembly; Board of Supervisors; Office of the Mayor; Department of Finance; Hope County Superior Court).
- Indicate the name of your division, board, or district, if applicable. (Examples: Division of Waste Management; Board of Accountancy; District 45). **Do not use acronyms.**
- Enter your position title. (Examples: Director; Chief Counsel; City Council Member; Staff Services Analyst).
- If you hold multiple positions (i.e., a city council member who also is a member of a county board or commission) you may be required to file separate and distinct statements with each agency. To simplify your filing obligations, in some cases you may instead complete a single expanded statement and file it with each agency.
  - The rules and processes governing the filing of an expanded statement are set forth in Regulation 18723.1. To file an expanded statement for multiple positions, enter the name of each agency with which you are required to file and your position title with each agency in the space provided. **Do not use acronyms.** Attach an additional sheet if necessary. Complete one statement disclosing all reportable interests for all jurisdictions. Then file the expanded statement with each agency as directed by Regulation 18723.1(c).

If you assume or leave a position after a filing deadline, you must complete a separate statement. For example, a city council member who assumes a position with a county special district after the April annual filing deadline must file a separate assuming office statement. In subsequent years, the city council member may expand their annual filing to include both positions.

### Example:

Brian Bourne is a city council member for the City of Lincoln and a board member for the Camp Far West Irrigation District – a multi-county agency that covers the Counties of Placer and Yuba. The City is located within Placer County. Brian may complete one expanded statement to disclose all reportable interests for both offices and list both positions on the Cover Page. Brian will file the expanded statement with each the City and the District as directed by Regulation 18723.1(c).

## Part 2. Jurisdiction of Office

- Check the box indicating the jurisdiction of your agency and, if applicable, identify the jurisdiction. Judges, judicial candidates, and court commissioners have statewide jurisdiction. All other filers should review the Reference Pamphlet, page 13, to determine their jurisdiction.
- If your agency is a multi-county office, list each county in which your agency has jurisdiction.

- If your agency is not a state office, court, county office, city office, or multi-county office (e.g., school districts, special districts and JPAs), check the “other” box and enter the county or city in which the agency has jurisdiction.

### Example:

This filer is a member of a water district board with jurisdiction in portions of Yuba and Sutter Counties.

<b>1. Office, Agency, or Court</b>	
Agency Name (Do not use acronyms)	
Feather River Irrigation District	
Division, Board, Department, District, if applicable	Your Position
N/A	Board Member
▶ If filing for multiple positions, list below or on an attachment. (Do not use acronyms)	
Agency: N/A	Position:
<b>2. Jurisdiction of Office (Check at least one box)</b>	
<input type="checkbox"/> State	<input type="checkbox"/> Judge or Court Commissioner (Statewide Jurisdiction)
<input checked="" type="checkbox"/> Multi-County Yuba & Sutter Counties	<input type="checkbox"/> County of _____
<input type="checkbox"/> City of _____	<input type="checkbox"/> Other _____

## Part 3. Type of Statement

Check at least one box. The period covered by a statement is determined by the type of statement you are filing. If you are completing a 2023 annual statement, **do not** change the pre-printed dates to reflect 2024. Your annual statement is used for reporting the **previous year's** economic interests. Economic interests for your annual filing covering January 1, 2024, through December 31, 2024, will be disclosed on your statement filed in 2025. See Reference Pamphlet, page 4.

Combining Statements: Certain types of statements for the same position may be combined. For example, if you leave office after January 1, but before the deadline for filing your annual statement, you may combine your annual and leaving office statements. File by the earliest deadline. Consult your filing officer or the FPPC.

## Part 4. Schedule Summary

- Complete the Schedule Summary after you have reviewed each schedule to determine if you have reportable interests.
- Enter the total number of completed pages including the cover page and either check the box for each schedule you use to disclose interests; **or** if you have nothing to disclose on any schedule, check the “No reportable interests” box. Please **do not** attach any blank schedules.

## Part 5. Verification

Complete the verification by signing the statement and entering the date signed. Each statement must have an original “wet” signature unless filed with a secure electronic signature. (See page 3 above.) All statements must be signed under penalty of perjury and be verified by the filer pursuant to Government Code Section 81004. See Regulation 18723.1(c) for filing instructions for copies of expanded statements.

**When you sign your statement, you are stating, under penalty of perjury, that it is true and correct.** Only the filer has authority to sign the statement. An unsigned statement is not considered filed and you may be subject to late filing penalties.

# SCHEDULE A-1

## Investments

### Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

Name

▶ NAME OF BUSINESS ENTITY \_\_\_\_\_

GENERAL DESCRIPTION OF THIS BUSINESS \_\_\_\_\_

---

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock Other \_\_\_\_\_ (Describe)

Partnership Income Received of \$0 - \$499  
Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_\_/\_\_\_\_\_/23      \_\_\_\_\_/\_\_\_\_\_/23  
ACQUIRED                  DISPOSED

▶ NAME OF BUSINESS ENTITY \_\_\_\_\_

GENERAL DESCRIPTION OF THIS BUSINESS \_\_\_\_\_

---

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock Other \_\_\_\_\_ (Describe)

Partnership Income Received of \$0 - \$499  
Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_\_/\_\_\_\_\_/23      \_\_\_\_\_/\_\_\_\_\_/23  
ACQUIRED                  DISPOSED

▶ NAME OF BUSINESS ENTITY \_\_\_\_\_

GENERAL DESCRIPTION OF THIS BUSINESS \_\_\_\_\_

---

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock Other \_\_\_\_\_ (Describe)

Partnership Income Received of \$0 - \$499  
Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_\_/\_\_\_\_\_/23      \_\_\_\_\_/\_\_\_\_\_/23  
ACQUIRED                  DISPOSED

▶ NAME OF BUSINESS ENTITY \_\_\_\_\_

GENERAL DESCRIPTION OF THIS BUSINESS \_\_\_\_\_

---

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock Other \_\_\_\_\_ (Describe)

Partnership Income Received of \$0 - \$499  
Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_\_/\_\_\_\_\_/23      \_\_\_\_\_/\_\_\_\_\_/23  
ACQUIRED                  DISPOSED

▶ NAME OF BUSINESS ENTITY \_\_\_\_\_

GENERAL DESCRIPTION OF THIS BUSINESS \_\_\_\_\_

---

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock Other \_\_\_\_\_ (Describe)

Partnership Income Received of \$0 - \$499  
Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_\_/\_\_\_\_\_/23      \_\_\_\_\_/\_\_\_\_\_/23  
ACQUIRED                  DISPOSED

▶ NAME OF BUSINESS ENTITY \_\_\_\_\_

GENERAL DESCRIPTION OF THIS BUSINESS \_\_\_\_\_

---

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock Other \_\_\_\_\_ (Describe)

Partnership Income Received of \$0 - \$499  
Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_\_/\_\_\_\_\_/23      \_\_\_\_\_/\_\_\_\_\_/23  
ACQUIRED                  DISPOSED

Comments: \_\_\_\_\_

## Instructions – Schedules A-1 and A-2 Investments

“Investment” means a financial interest in any business entity (including a consulting business or other independent contracting business) that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency’s jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more at any time during the reporting period. (See Reference Pamphlet, page 13.)

### Reportable investments include:

- Stocks, bonds, warrants, and options, including those held in margin or brokerage accounts and managed investment funds (See Reference Pamphlet, page 13.)
- Sole proprietorships
- Your own business or your spouse’s or registered domestic partner’s business (See Reference Pamphlet, page 8, for the definition of “business entity.”)
- Your spouse’s or registered domestic partner’s investments even if they are legally separate property
- Partnerships (e.g., a law firm or family farm)
- Investments in reportable business entities held in a retirement account (See Reference Pamphlet, page 15.)
- If you, your spouse or registered domestic partner, and dependent children together had a 10% or greater ownership interest in a business entity or trust (including a living trust), you must disclose investments held by the business entity or trust. (See Reference Pamphlet, page 16, for more information on disclosing trusts.)
- Business trusts

### You are not required to disclose:

- Government bonds, diversified mutual funds, certain funds similar to diversified mutual funds (such as exchange traded funds) and investments held in certain retirement accounts. (See Reference Pamphlet, page 13.) (Regulation 18237)
- Bank accounts, savings accounts, money market accounts and certificates of deposits
- Cryptocurrency
- Insurance policies
- Annuities
- Commodities
- Shares in a credit union
- Government bonds (including municipal bonds)

### Reminders

- Do you know your agency’s jurisdiction?
- Did you hold investments at any time during the period covered by this statement?
- Code filers – your disclosure categories may only require disclosure of specific investments.

- Retirement accounts invested in non-reportable interests (e.g., insurance policies, mutual funds, or government bonds) (See Reference Pamphlet, page 15.)
- Government defined-benefit pension plans (such as CalPERS and CalSTRS plans)
- Certain interests held in a blind trust (See Reference Pamphlet, page 16.)

**Use Schedule A-1** to report ownership of less than 10% (e.g., stock). Schedule C (Income) may also be required if the investment is not a stock or corporate bond. (See second example below.)

**Use Schedule A-2** to report ownership of 10% or greater (e.g., a sole proprietorship).

### To Complete Schedule A-1:

Do not attach brokerage or financial statements.

- Disclose the name of the business entity. Do not use acronyms for the name of the business entity, unless it is one that is commonly understood by the public.
- Provide a general description of the business activity of the entity (e.g., pharmaceuticals, computers, automobile manufacturing, or communications).
- Check the box indicating the highest fair market value of your investment during the reporting period. If you are filing a candidate or an assuming office statement, indicate the fair market value on the filing date or the date you took office, respectively. (See page 20 for more information.)
- Identify the nature of your investment (e.g., stocks, warrants, options, or bonds).
- An acquired or disposed of date is only required if you initially acquired or entirely disposed of the investment interest during the reporting period. The date of a stock dividend reinvestment or partial disposal is not required. Generally, these dates will not apply if you are filing a candidate or an assuming office statement.

Examples:

Frank Byrd holds a state agency position. Frank’s conflict of interest code requires full disclosure of investments. Frank must disclose stock holdings of \$2,000 or more in any company that is located in or does business in California, as well as those stocks held by Frank’s spouse or registered domestic partner and dependent children.

Alice Lance is a city council member. Alice has a 4% interest, worth \$5,000, in a limited partnership located in the city. Alice must disclose the partnership on Schedule A-1 and income of \$500 or more received from the partnership on Schedule C.

# SCHEDULE A-2

## Investments, Income, and Assets of Business Entities/Trusts

(Ownership Interest is 10% or Greater)

**CALIFORNIA FORM 700**  
FAIR POLITICAL PRACTICES COMMISSION

Name \_\_\_\_\_

**▶ 1. BUSINESS ENTITY OR TRUST**

Name \_\_\_\_\_

Address (Business Address Acceptable) \_\_\_\_\_

Check one  
Trust, go to 2      Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE      IF APPLICABLE, LIST DATE:

\$0 - \$1,999			
\$2,000 - \$10,000	____/____/23	____/____/23	
\$10,001 - \$100,000	ACQUIRED	DISPOSED	
\$100,001 - \$1,000,000			
Over \$1,000,000			

NATURE OF INVESTMENT  
Partnership      Sole Proprietorship      \_\_\_\_\_ Other

YOUR BUSINESS POSITION \_\_\_\_\_

**▶ 1. BUSINESS ENTITY OR TRUST**

Name \_\_\_\_\_

Address (Business Address Acceptable) \_\_\_\_\_

Check one  
Trust, go to 2      Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE      IF APPLICABLE, LIST DATE:

\$0 - \$1,999			
\$2,000 - \$10,000	____/____/23	____/____/23	
\$10,001 - \$100,000	ACQUIRED	DISPOSED	
\$100,001 - \$1,000,000			
Over \$1,000,000			

NATURE OF INVESTMENT  
Partnership      Sole Proprietorship      \_\_\_\_\_ Other

YOUR BUSINESS POSITION \_\_\_\_\_

**▶ 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)**

\$0 - \$499	\$10,001 - \$100,000
\$500 - \$1,000	OVER \$100,000
\$1,001 - \$10,000	

**▶ 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)**

\$0 - \$499	\$10,001 - \$100,000
\$500 - \$1,000	OVER \$100,000
\$1,001 - \$10,000	

**▶ 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)**

None      or      Names listed below \_\_\_\_\_

**▶ 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)**

None      or      Names listed below \_\_\_\_\_

**▶ 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST**

Check one box:

INVESTMENT      REAL PROPERTY

---

Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property \_\_\_\_\_

---

Description of Business Activity or City or Other Precise Location of Real Property \_\_\_\_\_

FAIR MARKET VALUE      IF APPLICABLE, LIST DATE:

\$2,000 - \$10,000			
\$10,001 - \$100,000	____/____/23	____/____/23	
\$100,001 - \$1,000,000	ACQUIRED	DISPOSED	
Over \$1,000,000			

NATURE OF INTEREST  
Property Ownership/Deed of Trust      Stock      Partnership

Leasehold \_\_\_\_\_      Other \_\_\_\_\_  
Yrs. remaining

Check box if additional schedules reporting investments or real property are attached

**▶ 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST**

Check one box:

INVESTMENT      REAL PROPERTY

---

Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property \_\_\_\_\_

---

Description of Business Activity or City or Other Precise Location of Real Property \_\_\_\_\_

FAIR MARKET VALUE      IF APPLICABLE, LIST DATE:

\$2,000 - \$10,000			
\$10,001 - \$100,000	____/____/23	____/____/23	
\$100,001 - \$1,000,000	ACQUIRED	DISPOSED	
Over \$1,000,000			

NATURE OF INTEREST  
Property Ownership/Deed of Trust      Stock      Partnership

Leasehold \_\_\_\_\_      Other \_\_\_\_\_  
Yrs. remaining

Check box if additional schedules reporting investments or real property are attached

Comments: \_\_\_\_\_

## Instructions – Schedule A-2

### Investments, Income, and Assets of Business Entities/Trusts

---

Use Schedule A-2 to report investments in a business entity (including a consulting business or other independent contracting business) or trust (including a living trust) in which you, your spouse or registered domestic partner, and your dependent children, together or separately, had a 10% or greater interest, totaling \$2,000 or more, during the reporting period and which is located in, doing business in, planning to do business in, or which has done business during the previous two years in your agency's jurisdiction. (See Reference Pamphlet, page 13.) A trust located outside your agency's jurisdiction is reportable if it holds assets that are located in or doing business in the jurisdiction. Do not report a trust that contains non-reportable interests. For example, a trust containing only your personal residence not used in whole or in part as a business, your savings account, and some municipal bonds, is not reportable.

Also report on Schedule A-2 investments and real property held by that entity or trust if your pro rata share of the investment or real property interest was \$2,000 or more during the reporting period.

#### To Complete Schedule A-2:

**Part 1.** Disclose the name and address of the business entity or trust. If you are reporting an interest in a business entity, check "Business Entity" and complete the box as follows:

- Provide a general description of the business activity of the entity.
- Check the box indicating the highest fair market value of your investment during the reporting period.
- If you initially acquired or entirely disposed of this interest during the reporting period, enter the date acquired or disposed.
- Identify the nature of your investment.
- Disclose the job title or business position you held with the entity, if any (i.e., if you were a director, officer, partner, trustee, employee, or held any position of management). A business position held by your spouse is not reportable.

**Part 2.** Check the box indicating **your pro rata** share of the **gross** income received **by** the business entity or trust. This amount includes your pro rata share of the **gross** income **from** the business entity or trust, as well as your community property interest in your spouse's or registered domestic partner's share. Gross income is the total amount of income before deducting expenses, losses, or taxes.

**Part 3.** Disclose the name of each source of income that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency's jurisdiction, as follows:

- Disclose each source of income and outstanding loan **to the business entity or trust** identified in Part 1 if your pro rata share of the **gross** income (including your community property interest in your spouse's or registered domestic partner's share) to the business entity or trust from that source was \$10,000 or more during the reporting period. (See Reference Pamphlet, page 11, for examples.) Income from governmental sources may be reportable if not considered salary. See Regulation 18232. Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.
- Disclose each individual or entity that was a source of commission income of \$10,000 or more during the reporting period through the business entity identified in Part 1. (See Reference Pamphlet, page 8.)

You may be required to disclose sources of income located outside your jurisdiction. For example, you may have a client who resides outside your jurisdiction who does business on a regular basis with you. Such a client, if a reportable source of \$10,000 or more, must be disclosed.

Mark "None" if you do not have any reportable \$10,000 sources of income to disclose. Phrases such as "various clients" or "not disclosing sources pursuant to attorney-client privilege" are not adequate disclosure. (See Reference Pamphlet, page 14, for information on procedures to request an exemption from disclosing privileged information.)

**Part 4.** Report any investments or interests in real property held or leased **by the entity or trust** identified in Part 1 if your pro rata share of the interest held was \$2,000 or more during the reporting period. Attach additional schedules or use FPPC's Form 700 Excel spreadsheet if needed.

- Check the applicable box identifying the interest held as real property or an investment.
- If investment, provide the name and description of the business entity.
- If real property, report the precise location (e.g., an assessor's parcel number or address).
- Check the box indicating the highest fair market value of your interest in the real property or investment during the reporting period. (Report the fair market value of the portion of your residence claimed as a tax deduction if you are utilizing your residence for business purposes.)
- Identify the nature of your interest.
- Enter the date acquired or disposed only if you initially acquired or entirely disposed of your interest in the property or investment during the reporting period.



## Instructions – Schedule B Interests in Real Property

Report interests in real property located in your agency's jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more any time during the reporting period. Real property is also considered to be "within the jurisdiction" of a local government agency if the property or any part of it is located within two miles outside the boundaries of the jurisdiction or within two miles of any land owned or used by the local government agency. (See Reference Pamphlet, page 13.)

### Interests in real property include:

- An ownership interest (including a beneficial ownership interest)
- A deed of trust, easement, or option to acquire property
- A leasehold interest (See Reference Pamphlet, page 14.)
- A mining lease
- An interest in real property held in a retirement account (See Reference Pamphlet, page 15.)
- An interest in real property held by a business entity or trust in which you, your spouse or registered domestic partner, and your dependent children together had a 10% or greater ownership interest (Report on Schedule A-2.)
- Your spouse's or registered domestic partner's interests in real property that are legally held separately by him or her

### You are not required to report:

- A residence, such as a home or vacation cabin, used exclusively as a personal residence (However, a residence in which you rent out a room or for which you claim a business deduction may be reportable. If reportable, report the fair market value of the portion claimed as a tax deduction.)
- Some interests in real property held through a blind trust (See Reference Pamphlet, page 16.)
  - **Please note:** A non-reportable property can still be grounds for a conflict of interest and may be disqualifying.

### To Complete Schedule B:

- Report the precise location (e.g., an assessor's parcel number or address) of the real property.
- Check the box indicating the fair market value of your interest in the property (regardless of what you owe on the property).
- Enter the date acquired or disposed only if you initially acquired or entirely disposed of your interest in the property during the reporting period.
- Identify the nature of your interest. If it is a leasehold,

### Reminders

- Income and loans already reported on Schedule B are not also required to be reported on Schedule C.
- Real property already reported on Schedule A-2, Part 4 is not also required to be reported on Schedule B.
- Code filers – do your disclosure categories require disclosure of real property?

disclose the number of years remaining on the lease.

- If you received rental income, check the box indicating the gross amount you received.
- If you had a 10% or greater interest in real property and received rental income, list the name of the source(s) if your pro rata share of the gross income from any single tenant was \$10,000 or more during the reporting period. If you received a total of \$10,000 or more from two or more tenants acting in concert (in most cases, this will apply to married couples), disclose the first and last name of each tenant. Otherwise, mark "None."
- Loans from a private lender that total \$500 or more and are secured by real property may be reportable. **Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.**

When reporting a loan:

- Provide the name and address of the lender.
- Describe the lender's business activity.
- Disclose the interest rate and term of the loan. For variable interest rate loans, disclose the conditions of the loan (e.g., Prime + 2) or the average interest rate paid during the reporting period. The term of a loan is the total number of months or years given for repayment of the loan at the time the loan was established.
- Check the box indicating the highest balance of the loan during the reporting period.
- Identify a guarantor, if applicable.

If you have more than one reportable loan on a single piece of real property, report the additional loan(s) on Schedule C.

### Example:

Allison Gande is a city planning commissioner. During the reporting period, Allison received rental income of \$12,000, from a single tenant who rented property owned in the city's jurisdiction. If Allison received \$6,000 each from two tenants, the tenants' names would not be required because no single tenant paid her \$10,000 or more. A married couple is considered a single tenant.

ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS <b>4600 24th Street</b>	
CITY <b>Sacramento</b>	
FAIR MARKET VALUE	IF APPLICABLE, LIST DATE:
<input type="checkbox"/> \$2,000 - \$10,000	<input type="checkbox"/> / / XX / XX
<input type="checkbox"/> \$10,001 - \$100,000	<input type="checkbox"/> ACQUIRED <input type="checkbox"/> DISPOSED
<input checked="" type="checkbox"/> \$100,001 - \$1,000,000	
<input type="checkbox"/> Over \$1,000,000	
NATURE OF INTEREST	
<input type="checkbox"/> Ownership/Deed of Trust	<input type="checkbox"/> Easement
<input type="checkbox"/> Leasehold	<input type="checkbox"/> Other
IF RENTAL PROPERTY, GROSS INCOME RECEIVED	
<input type="checkbox"/> \$0 - \$499	<input type="checkbox"/> \$500 - \$1,000
<input type="checkbox"/> \$1,001 - \$10,000	<input type="checkbox"/> \$10,001 - \$10,000
<input checked="" type="checkbox"/> \$10,001 - \$100,000	<input type="checkbox"/> OVER \$100,000
SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.	
<input type="checkbox"/> None	
<b>Henry Wells</b>	
NAME OF LENDER*	
<b>Sophia Petroillo</b>	
ADDRESS (Business Address Acceptable)	
<b>2121 Blue Sky Parkway, Sacramento</b>	
BUSINESS ACTIVITY, IF ANY, OF LENDER	
<b>Restaurant Owner</b>	
INTEREST RATE	TERM (Months/Years)
<b>8</b> % <input type="checkbox"/> None	<b>15</b> Years
HIGHEST BALANCE DURING REPORTING PERIOD	
<input type="checkbox"/> \$500 - \$1,000	<input type="checkbox"/> \$1,001 - \$10,000
<input checked="" type="checkbox"/> \$10,001 - \$100,000	<input type="checkbox"/> OVER \$100,000
<input type="checkbox"/> Guarantor, if applicable	
Comments:	





# Instructions – Schedule C

## Income, Loans, & Business Positions

### (Income Other Than Gifts and Travel Payments)

#### Reporting Income:

Report the source and amount of gross income of \$500 or more you received during the reporting period. Gross income is the total amount of income before deducting expenses, losses, or taxes and includes loans other than loans from a commercial lending institution. (See Reference Pamphlet, page 11.) You must also report the source of income to your spouse or registered domestic partner if your community property share was \$500 or more during the reporting period.

The source and income must be reported only if the source is located in, doing business in, planning to do business in, or has done business during the previous two years in your agency's jurisdiction. (See Reference Pamphlet, page 13.) Reportable sources of income may be further limited by your disclosure category located in your agency's conflict of interest code.

#### Reporting Business Positions:

You must report your job title with each reportable business entity even if you received no income during the reporting period. Use the comments section to indicate that no income was received.

#### Commonly reportable income and loans include:

- Salary/wages, per diem, and reimbursement for expenses including travel payments provided by your employer
- Community property interest (50%) in your spouse's or registered domestic partner's income - **report the employer's name and all other required information**
- Income from investment interests, such as partnerships, reported on Schedule A-1
- Commission income not required to be reported on Schedule A-2 (See Reference Pamphlet, page 8.)
- Gross income from any sale, including the sale of a house or car (Report your pro rata share of the total sale price.)
- Rental income not required to be reported on Schedule B
- Prizes or awards not disclosed as gifts
- Payments received on loans you made to others
- An honorarium received prior to becoming a public official (See Reference Pamphlet, page 10.)
- Incentive compensation (See Reference Pamphlet, page 12.)

#### Reminders

- Code filers – your disclosure categories may not require disclosure of all sources of income.
- If you or your spouse or registered domestic partner are self-employed, report the business entity on Schedule A-2.
- Do not disclose on Schedule C income, loans, or business positions already reported on Schedules A-2 or B.

#### You are not required to report:

- Salary, reimbursement for expenses or per diem, or social security, disability, or other similar benefit payments received by you or your spouse or registered domestic partner from a federal, state, or local government agency.
- Stock dividends and income from the sale of stock unless the source can be identified.
- Income from a PERS retirement account.

(See Reference Pamphlet, page 12.)

#### To Complete Schedule C:

##### Part 1. Income Received/Business Position Disclosure

- Disclose the name and address of each source of income or each business entity with which you held a business position.
- Provide a general description of the business activity if the source is a business entity.
- Check the box indicating the amount of gross income received.
- Identify the consideration for which the income was received.
- For income from commission sales, check the box indicating the gross income received and list the name of each source of commission income of \$10,000 or more. (See Reference Pamphlet, page 8.) **Note: If you receive commission income on a regular basis or have an ownership interest of 10% or more, you must disclose the business entity and the income on Schedule A-2.**
- Disclose the job title or business position, if any, that you held with the business entity, even if you did not receive income during the reporting period.

##### Part 2. Loans Received or Outstanding During the Reporting Period

- Provide the name and address of the lender.
- Provide a general description of the business activity if the lender is a business entity.
- Check the box indicating the highest balance of the loan during the reporting period.
- Disclose the interest rate and the term of the loan.
  - For variable interest rate loans, disclose the conditions of the loan (e.g., Prime + 2) or the average interest rate paid during the reporting period.
  - The term of the loan is the total number of months or years given for repayment of the loan at the time the loan was entered into.
- Identify the security, if any, for the loan.

**SCHEDULE D**  
**Income – Gifts**

Name \_\_\_\_\_

▶ NAME OF SOURCE *(Not an Acronym)*

\_\_\_\_\_

ADDRESS *(Business Address Acceptable)*

\_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF SOURCE

\_\_\_\_\_

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

\_\_\_\_\_

ADDRESS *(Business Address Acceptable)*

\_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF SOURCE

\_\_\_\_\_

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

\_\_\_\_\_

ADDRESS *(Business Address Acceptable)*

\_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF SOURCE

\_\_\_\_\_

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

\_\_\_\_\_

ADDRESS *(Business Address Acceptable)*

\_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF SOURCE

\_\_\_\_\_

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

\_\_\_\_\_

ADDRESS *(Business Address Acceptable)*

\_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF SOURCE

\_\_\_\_\_

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

\_\_\_\_\_

ADDRESS *(Business Address Acceptable)*

\_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF SOURCE

\_\_\_\_\_

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____
____/____/____	\$ _____	_____

Comments: \_\_\_\_\_

## Instructions – Schedule D Income – Gifts

A gift is anything of value for which you have not provided equal or greater consideration to the donor. A gift is reportable if its fair market value is \$50 or more. In addition, multiple gifts totaling \$50 or more received during the reporting period from a single source must be reported.

It is the acceptance of a gift, not the ultimate use to which it is put, that imposes your reporting obligation. Except as noted below, you must report a gift even if you never used it or if you gave it away to another person.

If the exact amount of a gift is unknown, you must make a good faith estimate of the item's fair market value. Listing the value of a gift as "over \$50" or "value unknown" is not adequate disclosure. In addition, if you received a gift through an intermediary, you must disclose the name, address, and business activity of both the donor and the intermediary. You may indicate an intermediary either in the "source" field after the name or in the "comments" section at the bottom of Schedule D.

### Commonly reportable gifts include:

- Tickets/passes to sporting or entertainment events
- Tickets/passes to amusement parks
- Parking passes not used for official agency business
- Food, beverages, and accommodations, including those provided in direct connection with your attendance at a convention, conference, meeting, social event, meal, or like gathering
- Rebates/discounts not made in the regular course of business to members of the public without regard to official status
- Wedding gifts (See Reference Pamphlet, page 16)
- An honorarium received prior to assuming office (You may report an honorarium as income on Schedule C, rather than as a gift on Schedule D, if you provided services of equal or greater value than the payment received. See Reference Pamphlet, page 10.)
- Transportation and lodging (See Schedule E.)
- Forgiveness of a loan received by you

### Reminders

- Gifts from a single source are subject to a \$590 limit in 2023. (See Reference Pamphlet, page 10.)
- Code filers – you only need to report gifts from reportable sources.

### Gift Tracking Mobile Application

- FPPC has created a gift tracking app for mobile devices that helps filers track gifts and provides a quick and easy way to upload the information to the Form 700. Visit FPPC's website to download the app.

### You are not required to disclose:

- Gifts that were not used and that, within 30 days after receipt, were returned to the donor or delivered to a charitable organization or government agency without being claimed by you as a charitable contribution for tax purposes
- Gifts from your spouse or registered domestic partner, child, parent, grandparent, grandchild, brother, sister, and certain other family members (See Regulation 18942 for a complete list.). The exception does not apply if the donor was acting as an agent or intermediary for a reportable source who was the true donor.
- Gifts of similar value exchanged between you and an individual, other than a lobbyist registered to lobby your state agency, on holidays, birthdays, or similar occasions
- Gifts of informational material provided to assist you in the performance of your official duties (e.g., books, pamphlets, reports, calendars, periodicals, or educational seminars)
- A monetary bequest or inheritance (However, inherited investments or real property may be reportable on other schedules.)
- Personalized plaques or trophies with an individual value of less than \$250
- Campaign contributions
- Up to two tickets, for your own use, to attend a fundraiser for a campaign committee or candidate, or to a fundraiser for an organization exempt from taxation under Section 501(c)(3) of the Internal Revenue Code. The ticket must be received from the organization or committee holding the fundraiser.
- Gifts given to members of your immediate family if the source has an established relationship with the family member and there is no evidence to suggest the donor had a purpose to influence you. (See Regulation 18943.)
- Free admission, food, and nominal items (such as a pen, pencil, mouse pad, note pad or similar item) available to all attendees, at the event at which the official makes a speech (as defined in Regulation 18950(b)(2)), so long as the admission is provided by the person who organizes the event.
- Any other payment not identified above, that would otherwise meet the definition of gift, where the payment is made by an individual who is not a lobbyist registered to lobby the official's state agency, where it is clear that the gift was made because of an existing personal or business relationship unrelated to the official's position and there is no evidence whatsoever at the time the gift is made to suggest the donor had a purpose to influence you.

### To Complete Schedule D:

- Disclose the full name (not an acronym), address, and, if a business entity, the business activity of the source.
- Provide the date (month, day, and year) of receipt, and disclose the fair market value and description of the gift.

**SCHEDULE E**  
**Income – Gifts**  
**Travel Payments, Advances,**  
**and Reimbursements**

Name \_\_\_\_\_

- Mark either the gift or income box.
- Mark the “501(c)(3)” box for a travel payment received from a nonprofit 501(c)(3) organization or the “Speech” box if you made a speech or participated in a panel. Per Government Code Section 89506, these payments may not be subject to the gift limit. However, they may result in a disqualifying conflict of interest.
- For gifts of travel, provide the travel destination.

▶ NAME OF SOURCE *(Not an Acronym)* \_\_\_\_\_

ADDRESS *(Business Address Acceptable)* \_\_\_\_\_

CITY AND STATE \_\_\_\_\_

501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE \_\_\_\_\_

DATE(S): \_\_\_\_/\_\_\_\_/\_\_\_\_ - \_\_\_\_/\_\_\_\_/\_\_\_\_ AMT: \$ \_\_\_\_\_  
*(If gift)*

▶ MUST CHECK ONE:      Gift **-or-**      Income

    Made a Speech/Participated in a Panel \_\_\_\_\_

    Other - Provide Description \_\_\_\_\_

▶ If Gift, Provide Travel Destination \_\_\_\_\_

▶ NAME OF SOURCE *(Not an Acronym)* \_\_\_\_\_

ADDRESS *(Business Address Acceptable)* \_\_\_\_\_

CITY AND STATE \_\_\_\_\_

501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE \_\_\_\_\_

DATE(S): \_\_\_\_/\_\_\_\_/\_\_\_\_ - \_\_\_\_/\_\_\_\_/\_\_\_\_ AMT: \$ \_\_\_\_\_  
*(If gift)*

▶ MUST CHECK ONE:      Gift **-or-**      Income

    Made a Speech/Participated in a Panel \_\_\_\_\_

    Other - Provide Description \_\_\_\_\_

▶ If Gift, Provide Travel Destination \_\_\_\_\_

▶ NAME OF SOURCE *(Not an Acronym)* \_\_\_\_\_

ADDRESS *(Business Address Acceptable)* \_\_\_\_\_

CITY AND STATE \_\_\_\_\_

501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE \_\_\_\_\_

DATE(S): \_\_\_\_/\_\_\_\_/\_\_\_\_ - \_\_\_\_/\_\_\_\_/\_\_\_\_ AMT: \$ \_\_\_\_\_  
*(If gift)*

▶ MUST CHECK ONE:      Gift **-or-**      Income

    Made a Speech/Participated in a Panel \_\_\_\_\_

    Other - Provide Description \_\_\_\_\_

▶ If Gift, Provide Travel Destination \_\_\_\_\_

▶ NAME OF SOURCE *(Not an Acronym)* \_\_\_\_\_

ADDRESS *(Business Address Acceptable)* \_\_\_\_\_

CITY AND STATE \_\_\_\_\_

501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE \_\_\_\_\_

DATE(S): \_\_\_\_/\_\_\_\_/\_\_\_\_ - \_\_\_\_/\_\_\_\_/\_\_\_\_ AMT: \$ \_\_\_\_\_  
*(If gift)*

▶ MUST CHECK ONE:      Gift **-or-**      Income

    Made a Speech/Participated in a Panel \_\_\_\_\_

    Other - Provide Description \_\_\_\_\_

▶ If Gift, Provide Travel Destination \_\_\_\_\_

**Comments:** \_\_\_\_\_

# Instructions – Schedule E Travel Payments, Advances, and Reimbursements

Travel payments reportable on Schedule E include advances and reimbursements for travel and related expenses, including lodging and meals.

Gifts of travel may be subject to the gift limit. In addition, certain travel payments are reportable gifts, but are not subject to the gift limit. To avoid possible misinterpretation or the perception that you have received a gift in excess of the gift limit, you may wish to provide a specific description of the purpose of your travel. (See the FPPC fact sheet entitled “Limitations and Restrictions on Gifts, Honoraria, Travel, and Loans” to read about travel payments under section 89506(a).)

**You are not required to disclose:**

- Travel payments received from any state, local, or federal government agency for which you provided services equal or greater in value than the payments received, such as reimbursement for travel on agency business from your government agency employer.
- A payment for travel from another local, state, or federal government agency and related per diem expenses when the travel is for education, training or other inter-agency programs or purposes.
- Travel payments received from your employer in the normal course of your employment that are included in the income reported on Schedule C.
- A travel payment that was received from a nonprofit entity exempt from taxation under Internal Revenue Code Section 501(c)(3) for which you provided equal or greater consideration, such as reimbursement for travel on business for a 501(c)(3) organization for which you are a board member.

**Note: Certain travel payments may not be reportable if reported via email on Form 801 by your agency.**

**To Complete Schedule E:**

- Disclose the full name (not an acronym) and address of the source of the travel payment.
- Identify the business activity if the source is a business entity.
- Check the box to identify the payment as a gift or income, report the amount, and disclose the date(s).
  - **Travel payments are gifts** if you did not provide services that were equal to or greater in value than the payments received. You must disclose gifts totaling \$500 or more from a single source during the period covered by the statement.

When reporting travel payments that are gifts, you must provide a description of the gift, the **date(s)** received, and the **travel destination**.

- **Travel payments are income** if you provided services that were equal to or greater in value than the

payments received. You must disclose income totaling \$500 or more from a single source during the period covered by the statement. You have the burden of proving the payments are income rather than gifts. When reporting travel payments as income, you must describe the services you provided in exchange for the payment. You are not required to disclose the date(s) for travel payments that are income.

**Example:**

City council member MaryClaire Chandler is the chair of a 501(c)(6) trade association, and the association pays for MaryClaire's travel to attend its meetings. Because MaryClaire is deemed to be providing equal or greater consideration for the travel payment by virtue of serving on the board, this payment may be reported as income. Payments for MaryClaire to attend other events for which they are not providing services are likely considered gifts.

▶ NAME OF SOURCE (Not an Acronym)	
Health Services Trade Association	
ADDRESS (Business Address Acceptable)	
1230 K Street, Suite 610	
CITY AND STATE	
Sacramento, CA	
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE	
Association of Healthcare Workers	
DATE(S):	AMT: \$ 550.00
(if gift)	
▶ MUST CHECK ONE: <input type="checkbox"/> Gift -or- <input checked="" type="checkbox"/> Income	
<input type="radio"/> Made a Speech/Participated in a Panel	
<input checked="" type="radio"/> Other - Provide Description <u>Travel reimbursement for board meeting.</u>	
▶ If Gift, Provide Travel Destination _____	

Note that the same payment from a 501(c)(3) would NOT be reportable.

**Example:**

Mayor Kim travels to China on a trip organized by China Silicon Valley Business Development, a California nonprofit, 501(c)(6) organization. The Chengdu Municipal People's Government pays for Mayor Kim's airfare and travel costs, as well as meals and lodging during the trip. The trip's agenda shows that the trip's purpose is to promote job creation and economic activity in China and in Silicon Valley, so the trip is reasonably related to a governmental purpose.

▶ NAME OF SOURCE (Not an Acronym)	
Chengdu Municipal People's Government	
ADDRESS (Business Address Acceptable)	
2 Caoshi St. CaoShiJie, Qingyang Qu, Chengdu Shi,	
CITY AND STATE	
Sichuan Sheng, China, 610000	
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE	
DATE(S):	AMT: \$ 3,874.38
(if gift)	
▶ MUST CHECK ONE: <input checked="" type="checkbox"/> Gift -or- <input type="checkbox"/> Income	
<input type="radio"/> Made a Speech/Participated in a Panel	
<input checked="" type="radio"/> Other - Provide Description <u>Travel reimbursement for trip to China.</u>	
▶ If Gift, Provide Travel Destination <u>Sichuan Sheng, China</u>	

Thus, Mayor Kim must report the gift of travel, but the gift is exempt from the gift limit. In this case, the travel payments are not subject to the gift limit because the source is a foreign government and because the travel is reasonably related to a governmental purpose. (Section 89506(a)(2).) Note that Mayor Kim could be disqualified from participating in or making decisions about The Chengdu Municipal People's Government for 12 months. Also note that if China Silicon Valley Business Development (a 501(c)(6) organization) paid for the travel costs rather than the governmental organization, the payments would be subject to the gift limits. (See the FPPC fact sheet, Limitations and Restrictions on Gifts, Honoraria, Travel and Loans, at [www.fppc.ca.gov](http://www.fppc.ca.gov).)

## Restrictions and Prohibitions

The Political Reform Act (Gov. Code Sections 81000-91014) requires most state and local government officials and employees to publicly disclose their economic interests including personal assets and income. The Act's conflict of interest provisions also disqualify a public official from taking part in a governmental decision if it is reasonably foreseeable that the decision will have a material financial effect on these economic interests as well as the official's personal finances and those of immediate family. (Gov. Code Sections 87100 and 87103.) The Fair Political Practices Commission (FPPC) is the state agency responsible for issuing the attached Statement of Economic Interests, Form 700, and for interpreting the Act's provisions.

### Gift Prohibition

Gifts received by most state and local officials, employees, and candidates are subject to a limit. In 2023-2024, the gift limit increased to \$590 from a single source during a calendar year.

Additionally, state officials, state candidates, and certain state employees are subject to a \$10 limit per calendar month on gifts from lobbyists and lobbying firms registered with the Secretary of State. See Reference Pamphlet, page 10.

State and local officials and employees should check with their agency to determine if other restrictions apply.

### Disqualification

Public officials are, under certain circumstances, required to disqualify themselves from making, participating in, or attempting to influence governmental decisions that will affect their economic interests. This may include interests they are not required to disclose. For example, a personal residence is often not reportable, but may be grounds for disqualification. Specific disqualification requirements apply to 87200 filers (e.g., city councilmembers, members of boards of supervisors, planning commissioners, etc.). These officials must publicly identify the economic interest that creates a conflict of interest and leave the room before a discussion or vote takes place at a public meeting. For more information, consult Government Code Section 87105, Regulation 18707, and the Guide to Recognizing Conflicts of Interest page at [www.fppc.ca.gov](http://www.fppc.ca.gov).

### Honorarium Ban

Most state and local officials, employees, and candidates are prohibited from accepting an honorarium for any speech given, article published, or attendance at a conference, convention, meeting, or like gathering. (See Reference Pamphlet, page 10.)

### Loan Restrictions

Certain state and local officials are subject to restrictions on loans. (See Reference Pamphlet, page 14.)

### Post-Governmental Employment

There are restrictions on representing clients or employers before former agencies. The provisions apply to elected state officials, most state employees, local elected officials, county chief administrative officers, city managers, including the chief administrator of a city, and general managers or chief administrators of local special districts and JPAs. The FPPC website has fact sheets explaining the provisions.

### Late Filing

The filing officer who retains originally-signed or electronically filed statements of economic interests may impose on an individual a fine for any statement that is filed late. The fine is \$10 per day up to a maximum of \$100. Late filing penalties may be reduced or waived under certain circumstances.

Persons who fail to timely file their Form 700 may be referred to the FPPC's Enforcement Division (and, in some cases, to the Attorney General or district attorney) for investigation and possible prosecution. In addition to the late filing penalties, a fine of up to \$5,000 per violation may be imposed.

**For assistance** concerning reporting, prohibitions, and restrictions under the Act:

- Email questions to [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov).
- Call the FPPC toll-free at (866) 275-3772.

### Form 700 is a Public Document Public Access Must Be Provided

Statements of Economic Interests are public documents. The filing officer must permit any member of the public to inspect and receive a copy of any statement.

- Statements must be available as soon as possible during the agency's regular business hours, but in any event not later than the second business day after the statement is received. Access to the Form 700 is not subject to the Public Records Act procedures.
- No conditions may be placed on persons seeking access to the forms.
- No information or identification may be required from persons seeking access.
- Reproduction fees of no more than 10 cents per page may be charged.

## Questions and Answers

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### General

- Q. What is the reporting period for disclosing interests on an assuming office statement or a candidate statement?
- A. On an assuming office statement, disclose all reportable investments, interests in real property, and business positions held on the date you assumed office. In addition, you must disclose income (including loans, gifts and travel payments) received during the 12 months prior to the date you assumed office.

On a candidate statement, disclose all reportable investments, interests in real property, and business positions held on the date you file your declaration of candidacy. You must also disclose income (including loans, gifts and travel payments) received during the 12 months prior to the date you file your declaration of candidacy.

- Q. I hold two other board positions in addition to my position with the county. Must I file three statements of economic interests?
- A. Yes, three are required. However, you may instead complete an expanded statement listing the county and the two boards on the Cover Page or an attachment as the agencies for which you will be filing. Disclose all reportable economic interests in all three jurisdictions on the expanded statement. File the expanded statement for your primary position providing an original “wet” signature unless filed with a secure electronic signature. (See page 3 above.) File copies of the expanded statement with the other two agencies as required by Regulation 18723.1(c). Remember to complete separate statements for positions that you leave or assume during the year.
- Q. I am a department head who recently began acting as city manager. Should I file as the city manager?
- A. Yes. File an assuming office statement as city manager. Persons serving as “acting,” “interim,” or “alternate” must file as if they hold the position because they are or may be performing the duties of the position.

- Q. My spouse and I are currently separated and in the process of obtaining a divorce. Must I still report my spouse’s income, investments, and interests in real property?
- A. Yes. A public official must continue to report a spouse’s economic interests until such time as dissolution of marriage proceedings is final. However, if a separate property agreement has been reached prior to that time, your estranged spouse’s income may not have to be reported. Contact the FPPC for more information.
- Q. As a designated employee, I left one state agency to work for another state agency. Must I file a leaving office statement?
- A. Yes. You may also need to file an assuming office statement for the new agency.

### Investment Disclosure

- Q. I have an investment interest in shares of stock in a company that does not have an office in my jurisdiction. Must I still disclose my investment interest in this company?
- A. Probably. The definition of “doing business in the jurisdiction” is not limited to whether the business has an office or physical location in your jurisdiction. (See Reference Pamphlet, page 13.)
- Q. My spouse and I have a living trust. The trust holds rental property in my jurisdiction, our primary residence, and investments in diversified mutual funds. I have full disclosure. How is this trust disclosed?
- A. Disclose the name of the trust, the rental property and its income on Schedule A-2. Your primary residence and investments in diversified mutual funds registered with the SEC are not reportable.
- Q. I am required to report all investments. I have an IRA that contains stocks through an account managed by a brokerage firm. Must I disclose these stocks even though they are held in an IRA and I did not decide which stocks to purchase?
- A. Yes. Disclose on Schedule A-1 or A-2 any stock worth \$2,000 or more in a business entity located in or doing business in your jurisdiction.

## Questions and Answers Continued

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- Q. The value of my stock changed during the reporting period. How do I report the value of the stock?
- A. You are required to report the highest value that the stock reached during the reporting period. You may use your monthly statements to determine the highest value. You may also use the entity's website to determine the highest value. You are encouraged to keep a record of where you found the reported value. Note that for an assuming office statement, you must report the value of the stock on the date you assumed office.
- Q. I am the sole owner of my business, an S-Corporation. I believe that the nature of the business is such that it cannot be said to have any "fair market value" because it has no assets. I operate the corporation under an agreement with a large insurance company. My contract does not have resale value because of its nature as a personal services contract. Must I report the fair market value for my business on Schedule A-2 of the Form 700?
- A. Yes. Even if there are no *tangible* assets, intangible assets, such as relationships with companies and clients are commonly sold to qualified professionals. The "fair market value" is often quantified for other purposes, such as marital dissolutions or estate planning. In addition, the IRS presumes that "personal services corporations" have a fair market value. A professional "book of business" and the associated goodwill that generates income are not without a determinable value. The Form 700 does not require a precise fair market value; it is only necessary to check a box indicating the broad range within which the value falls.
- Q. I own stock in IBM and must report this investment on Schedule A-1. I initially purchased this stock in the early 1990s; however, I am constantly buying and selling shares. Must I note these dates in the "Acquired" and "Disposed" fields?
- A. No. You must only report dates in the "Acquired" or "Disposed" fields when, during the reporting period, you initially purchase a reportable investment worth \$2,000 or more or when you dispose of the entire investment. You are not required to track the partial trading of an investment.
- Q. On last year's filing I reported stock in Encoe valued at \$2,000 - \$10,000. Late last year the value of this stock fell below and remains at less than \$2,000. How should this be reported on this year's statement?
- A. You are not required to report an investment if the value was less than \$2,000 during the **entire** reporting period. However, because a disposed date is not required for stocks that fall below \$2,000, you may want to report the stock and note in the "comments" section that the value fell below \$2,000. This would be for informational purposes only; it is not a requirement.
- Q. We have a Section 529 account set up to save money for our son's college education. Is this reportable?
- A. If the Section 529 account contains reportable interests (e.g., common stock valued at \$2,000 or more), those interests are reportable (not the actual Section 529 account). If the account contains solely mutual funds, then nothing is reported.

### Income Disclosure

- Q. I reported a business entity on Schedule A-2. Clients of my business are located in several states. Must I report all clients from whom my pro rata share of income is \$10,000 or more on Schedule A-2, Part 3?
- A. No, only the clients located in or doing business on a regular basis in your jurisdiction must be disclosed.
- Q. I believe I am not required to disclose the names of clients from whom my pro rata share of income is \$10,000 or more on Schedule A-2 because of their right to privacy. Is there an exception for reporting clients' names?
- A. Regulation 18740 provides a procedure for requesting an exemption to allow a client's name not to be disclosed if disclosure of the name would violate a legally recognized privilege under California or Federal law. This regulation may be obtained from our website at [www.fppc.ca.gov](http://www.fppc.ca.gov). (See Reference Pamphlet, page 14.)



## Questions and Answers Continued

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Q. I am sole owner of a private law practice that is not reportable based on my limited disclosure category. However, some of the sources of income to my law practice are from reportable sources. Do I have to disclose this income?

A. Yes, even though the law practice is not reportable, reportable sources of income to the law practice of \$10,000 or more must be disclosed. This information would be disclosed on Schedule C with a note in the "comments" section indicating that the business entity is not a reportable investment. The note would be for informational purposes only; it is not a requirement.

Q. I am the sole owner of my business. Where do I disclose my income - on Schedule A-2 or Schedule C?

A. Sources of income to a business in which you have an ownership interest of 10% or greater are disclosed on Schedule A-2. (See Reference Pamphlet, page 8.)

Q. My spouse is a partner in a four-person firm where all of their business is based on their own billings and collections from various clients. How do I report my community property interest in this business and the income generated in this manner?

A. If your spouse's investment in the firm is 10% or greater, disclose 100% of your spouse's share of the business on Schedule A-2, Part 1 and 50% of your spouse's income on Schedule A-2, Parts 2 and 3. For example, a client of your spouse's must be a source of at least \$20,000 during the reporting period before the client's name is reported.

Q. How do I disclose my spouse's or registered domestic partner's salary?

A. Report the name of the employer as a source of income on Schedule C.

Q. I am a doctor. For purposes of reporting \$10,000 sources of income on Schedule A-2, Part 3, are the patients or their insurance carriers considered sources of income?

A. If your patients exercise sufficient control by selecting you instead of other doctors, then your patients, rather than their insurance carriers, are sources of income to you. (See Reference Pamphlet, page 14.)

Q. I received a loan from my grandfather to purchase my home. Is this loan reportable?

A. No. Loans received from family members are not reportable.

Q. Many years ago, I loaned my parents several thousand dollars, which they paid back this year. Do I need to report this loan repayment on my Form 700?

A. No. Payments received on a loan made to a family member are not reportable.

### Real Property Disclosure

Q. During this reporting period we switched our principal place of residence into a rental. I have full disclosure and the property is located in my agency's jurisdiction, so it is now reportable. Because I have not reported this property before, do I need to show an "acquired" date?

A. No, you are not required to show an "acquired" date because you previously owned the property. However, you may want to note in the "comments" section that the property was not previously reported because it was used exclusively as your residence. This would be for informational purposes only; it is not a requirement.

Q. I am a city manager, and I own a rental property located in an adjacent city, but one mile from the city limit. Do I need to report this property interest?

A. Yes. You are required to report this property because it is located within 2 miles of the boundaries of the city you manage.

Q. Must I report a home that I own as a personal residence for my daughter?

A. You are not required to disclose a home used as a personal residence for a family member unless you receive income from it, such as rental income.

Q. I am a co-signer on a loan for a rental property owned by a friend. Since I am listed on the deed of trust, do I need to report my friend's property as an interest in real property on my Form 700?

A. No. Simply being a co-signer on a loan for property does not create a reportable interest in that real property.

## Questions and Answers Continued

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### Gift Disclosure

- Q. If I received a reportable gift of two tickets to a concert valued at \$100 each, but gave the tickets to a friend because I could not attend the concert, do I have any reporting obligations?
- A. Yes. Since you accepted the gift and exercised discretion and control of the use of the tickets, you must disclose the gift on Schedule D.
- Q. Julia and Jared Benson, a married couple, want to give a piece of artwork to a county supervisor. Is each spouse considered a separate source for purposes of the gift limit and disclosure?
- A. Yes, each spouse may make a gift valued at the gift limit during a calendar year. For example, during 2023 the gift limit was \$590, so the Bensons may have given the supervisor artwork valued at no more than \$1,080. The supervisor must identify Jared and Julia Benson as the sources of the gift.
- Q. I am a Form 700 filer with full disclosure. Our agency holds a holiday raffle to raise funds for a local charity. I bought \$10 worth of raffle tickets and won a gift basket valued at \$120. The gift basket was donated by Doug Brewer, a citizen in our city. At the same event, I bought raffle tickets for, and won a quilt valued at \$70. The quilt was donated by a coworker. Are these reportable gifts?
- A. Because the gift basket was donated by an outside source (not an agency employee), you have received a reportable gift valued at \$110 (the value of the basket less the consideration paid). The source of the gift is Doug Brewer and the agency is disclosed as the intermediary. Because the quilt was donated by an employee of your agency, it is not a reportable gift.
- Q. My agency is responsible for disbursing grants. An applicant (501(c)(3) organization) met with agency employees to present its application. At this meeting, the applicant provided food and beverages. Would the food and beverages be considered gifts to the employees? These employees are designated in our agency's conflict of interest code and the applicant is a reportable source of income under the code.
- A. Yes. If the value of the food and beverages consumed by any one filer, plus any other gifts received from the same source during the reporting period total \$50 or more, the food and beverages would be reported using the fair market value and would be subject to the gift limit.
- Q. I received free admission to an educational conference related to my official duties. Part of the conference fees included a round of golf. Is the value of the golf considered informational material?
- A. No. The value of personal benefits, such as golf, attendance at a concert, or sporting event, are gifts subject to reporting and limits.

Alameda County Mosquito Abatement Dist.  
**Check Register**  
 For the Period From Dec 1, 2023 to Dec 15, 2023

Filter Criteria includes: Report order is by Date.

<b>Check #</b>	<b>Date</b>	<b>Payee</b>	<b>Amount</b>
4250	12/13/23	Airgas	430.02
4251	12/13/23	Alco Sheet Metal and Heating, Inc.	175.00
4252	12/13/23	AT&T	96.64
4253	12/13/23	Bay Alarm	270.99
4254	12/13/23	Capital Program Management, Inc.	1,142.00
4255	12/13/23	Cintas	677.12
4256	12/13/23	Coverall North America, Inc.	495.00
4257	12/13/23	GCJ, Inc.	40,203.05
4258	12/13/23	Grainger	340.12
4259	12/13/23	Leading Edge Associate, Inc.	18,600.00
4260	12/13/23	PFM Asset Management LLC	1,617.83
4261	12/13/23	PG&E	216.18
4262	12/13/23	Techniclean	66.82
4263	12/13/23	UMPQUA Bank Commerical Card OPS	18,833.78
4264	12/13/23	Voya Institutional Trust Company	185.16
ACH	12/13/23	Alameda County Mosquito Abatement Dist (Payroll)	91,943.35
ACH	12/13/23	CalPERS Retirement	18,399.85
ACH	12/13/23	CalPERS 457	3,812.33
ACH	12/13/23	Lopez, Robin	700.00
<b>Total Expenditures - December 15, 2023</b>			<b>198,205.24</b>

## Alameda County Mosquito Abatement Dist.

## Check Register

For the Period From Dec 16, 2023 to Dec 31, 2023

Filter Criteria includes: Report order is by Date.

Check #	Date	Payee	Amount
4265	12/20/23	Airgas	166.10
4266	12/20/23	Bay Alarm	640.24
4267	12/20/23	Beck's Shoes	190.00
4268	12/20/23	CarQuest	5.80
4269	12/20/23	Cintas	342.01
4270	12/20/23	Delta Dental	4,928.56
4271	12/20/23	Grainger	315.53
4272	12/20/23	Hentschke, Eric Armin	100.00
4273	12/20/23	NBC Supply Corp	398.70
4274	12/20/23	NRAAA Janitorial Services	1,950.00
4275	12/20/23	Rusmisl, Benjamin	1,495.50
4276	12/20/23	Target Specialty Products	4,877.94
4277	12/20/23	Technical Safety Services, LLC	468.87
4278	12/20/23	Verizon	322.31
4279	12/20/23	Voya Institutional Trust Company	185.16
4280	12/20/23	WEX Bank	538.65
4281	12/20/23	Regional Government	689.00
ACH	12/20/23	Alameda County Mosquito Abatement Dist (Payroll)	92,686.37
ACH	12/20/23	Aguilar, Victor	100.00
ACH	12/20/23	Arkin, Valerie	100.00
ACH	12/20/23	Beatty, Robert .P	100.00
ACH	12/20/23	Bhat, Subrahmanya Y	100.00
ACH	12/20/23	CalPERS Health	45,506.85
ACH	12/20/23	CalPERS Retirement	18,399.85
ACH	12/20/23	CalPERS 457	3,812.33
ACH	12/20/23	Lopez, Robin	100.00
ACH	12/20/23	Qaadri, Kashef	100.00
ACH	12/20/23	Roache, Cathy J Pinkerton.	100.00
ACH	12/20/23	Salzer, Hope	100.00
ACH	12/20/23	Savage, Tyler	100.00
ACH	12/20/23	Syrop, George	100.00
ACH	12/20/23	Zlatnik, John	100.00
<b>Total Expenditures - December 31, 2023</b>			<b>179,119.77</b>

**Alameda County Mosquito Abatement District  
Income Statement  
December 31, 2023. (6 of 12 mth, 50%)**

<b>REVENUES</b>	Actual 2021/22	Actual 2022/23	Current Month	Year to Date 2023/24	Budget 2023/24	Actual vs Budget
<b>Total Revenue</b>	\$ 5,416,367.00	\$ 5,926,614.00	\$ 2,707,936.29	\$ 3,346,434.91	\$ 5,008,804.00	67%

<b>EXPENDITURES</b>	Actual 2021/22	Actual 2022/23 <sup>1</sup>	Current Month <sup>2</sup>	Year to Date 2023/24	Budget 2023/24	Actual vs Budget
Salaries	\$ 2,129,077.24	\$ 2,309,118.48	\$ 204,757.26	\$ 1,206,229.99	\$2,462,469	49%
CalPERS Retirement	\$ 471,085.19	\$ 525,486.67	\$ 21,751.06	\$ 417,058.01	\$553,955	75%
Medicare & Social Security	\$ 30,025.60	\$ 33,691.96	\$ 2,916.08	\$ 15,689.12	\$40,292	39%
Fringe Benefits	\$ 484,487.10	\$ 604,257.75	\$ 50,435.41	\$ 289,700.62	\$605,491	48%
<b>Total Salaries, Retirement, &amp; Benefits</b>	<b>\$ 3,114,675.13</b>	<b>\$ 3,472,554.86</b>	<b>\$ 279,859.81</b>	<b>\$ 1,928,677.74</b>	<b>\$3,662,207</b>	<b>53%</b>
Clothing and personal supplies (purchased)	\$ 7,881.80	\$ 7,517.57	\$ 391.36	\$ 1,325.84	\$9,000	15%
Laundry service and supplies (rented)	\$ 10,417.41	\$ 12,853.29	\$ 1,019.13	\$ 6,152.49	\$13,000	47%
Utilities	\$ 18,134.35	\$ 19,415.68	\$ 1,113.24	\$ 4,513.96	\$23,700	19%
Communications-IT	\$ 74,950.03	\$ 97,711.30	\$ 20,878.16	\$ 39,887.77	\$104,000	38%
Maintenance: structures & improvements	\$ 26,671.36	\$ 18,062.12	\$ 2,175.83	\$ 11,212.27	\$30,000	37%
Maintenance of equipment	\$ 25,354.56	\$ 36,209.89	\$ 3,663.55	\$ 7,797.56	\$30,000	26%
Transportation, travel, training, & board	\$ 120,418.29	\$ 133,124.33	\$ 15,864.87	\$ 63,988.20	\$127,990	50%
Professional services	\$ 97,726.00	\$ 93,114.84	\$ 2,306.83	\$ 48,606.61	\$122,950	40%
Memberships, dues, & subscriptions	\$ 25,103.23	\$ 24,593.62	\$ -	\$ 20,785.94	\$27,000	77%
Insurance - (VCJPA, UAS)	\$ 160,932.64	\$ 177,962.64	\$ -	\$ 209,342.00	\$211,959	99%
Community education	\$ 26,225.45	\$ 28,193.67	\$ 232.08	\$ 14,506.45	\$53,000	27%
Operations	\$ 182,575.57	\$ 120,638.42	\$ 1,439.48	\$ 125,163.58	\$261,500	48%
Household expenses	\$ 25,388.02	\$ 18,517.21	\$ 1,532.78	\$ 8,617.25	\$21,350	40%
Office expenses	\$ 7,002.84	\$ 7,247.77	\$ 314.73	\$ 2,266.43	\$13,000	17%
Laboratory supplies	\$ 82,354.03	\$ 106,783.12	\$ 5,126.54	\$ 68,454.56	\$140,000	49%
Small tools and instruments	\$ 1,963.31	\$ 2,119.69	\$ 61.57	\$ 455.35	\$3,000	15%
<b>Total Staff Budget</b>	<b>\$ 893,098.89</b>	<b>\$ 904,065.16</b>	<b>\$ 56,120.15</b>	<b>\$ 633,076.26</b>	<b>\$1,191,449</b>	<b>53%</b>
<b>Total Operating Expenditures</b>	<b>\$ 4,007,774.02</b>	<b>\$ 4,376,620.02</b>	<b>\$ 335,979.96</b>	<b>\$ 2,561,754.00</b>	<b>\$4,853,656</b>	<b>53%</b>

1 - As of June 30, 2023.

2 - Total Operating Expenditures in current month may not match the check register due to accounts receivable, petty cash transactions, and transactions related to the last fiscal year.

**Alameda County Mosquito Abatement District  
Investment, Reserves, and Cash Balance Report  
December 31, 2023. (6 of 12 mth, 50%)**

Account #	Investment Accounts	Beginning Balance	Deposits	Withdrawals	Earnings <sup>1</sup>	Ending Balance
1004	LAIF	\$ 108,311.53	\$ -	\$ -	\$ -	\$ 108,311.53
1005	OPEB Fund	\$ 4,540,043.16	\$ -	\$ -	\$ 206,589.78	\$ 4,746,632.94
1006	VCJPA Member Contingency <sup>2</sup>	\$ 308,734.00	\$ -	\$ -	\$ -	\$ 308,734.00
1011	CAMP: Capital Reserve Fund	\$ 424,136.85	\$ -	\$ (41,345.05)	\$ 1,886.75	\$ 384,678.55
1012	PARS: Pension Stabilization <sup>3</sup>	\$ 2,287,594.80	\$ -	\$ -	\$ 132,507.95	\$ 2,420,102.75
1013	California CLASS: Public Health Emergency Fund	\$ 533,485.20	\$ -	\$ -	\$ 2,510.91	\$ 535,996.11
1014	California CLASS: Operational Fund	\$ 1,346,308.06	\$ -	\$ (335,290.96)	\$ 5,610.58	\$ 1,016,627.68
1015	California CLASS: Repair and Replace Fund	\$ 3,276,556.31	\$ -	\$ -	\$ 15,421.50	\$ 3,291,977.81
1016	California CLASS: Operating Reserve Fund	\$ 2,067,262.59	\$ -	\$ -	\$ 9,729.82	\$ 2,076,992.41
<b>Total</b>		<b>\$ 14,892,432.50</b>	<b>\$ -</b>	<b>\$ (376,636.01)</b>	<b>\$ 374,257.29</b>	<b>\$ 14,890,053.78</b>
Account #	Cash Accounts	Beginning Balance	Deposits	Activity	Ending Balance	
1001	Bank of America (Payroll Account) *	\$ 145,637.57	\$ -	\$ -	\$ 150,124.42	
1003	County Account	\$ 904,024.26	\$ -	\$ 2,707,936.29	\$ 3,611,960.55	
1017	Five Star Bank (Transfer Account) *	\$ 225,354.16	\$ -	\$ -	\$ 203,442.63	
1018	Petty Cash	\$ 248.96	\$ -	\$ -	\$ 248.96	
<b>Total</b>		<b>\$ 1,275,264.95</b>	<b>\$ -</b>	<b>\$ 2,707,936.29</b>	<b>\$ 3,965,776.56</b>	

1 - Earnings are booked as unrealized gains/losses. These earnings would not be recognized as "realized" gains/losses until the accounts are liquidated.

2 - VCJPA Member Contingency balance is as of September 30, 2023.

3- PARS - Pension Stabilization balance is as of November 30, 2023.

\* - Ending balance differs from beginning balance due to checks clearing the account.

Alameda County Mosquito Abatement  
Balance Sheet Comparison  
December

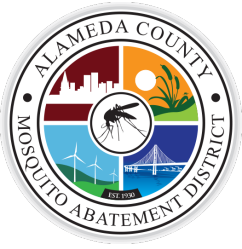
ASSETS	12/31/2023	12/31/2022	12/31/2021
Current Assets			
Bank of America payroll	\$ 144,945.89	\$ 153,730.00	\$ 93,727.26
Bank of the West <sup>1</sup>	-	439,401.38	394,069.65
County	3,611,960.55	3,391,907.31	3,245,909.27
Cash with LAIF	108,311.53	585,385.10	1,703,552.12
VCJPA- Member Contingency	308,734.00	346,337.00	371,021.00
CAMP - Repair and Replace <sup>2</sup>	-	2,667,094.10	1,355,614.26
CAMP - Public Health Emergency <sup>3</sup>	-	-	526,355.65
CAMP - Operating Reserve <sup>4</sup>	-	1,978,863.55	1,944,828.90
CAMP - Capital Reserve Fund	384,678.55	371,515.51	30,004.88
PARS	2,420,102.75	2,027,893.70	1,868,569.30
Five Star Bank	242,018.58	-	-
California CLASS: Public Health Emergency Fund	535,996.11	534,913.63	-
California CLASS: Operational Fund	1,016,627.68	-	-
California CLASS: Repair and Replace Fund	3,291,977.81	-	-
California CLASS: Operating Reserve Fund	2,076,992.41	-	-
Accounts Receivable	-	-	-
Petty cash	248.96	275.59	276.06
<b>Total Current Assets</b>	<b>14,142,594.82</b>	<b>12,497,316.87</b>	<b>11,533,928.35</b>
Property and Equipment			
Acc Dep - equipment	(1,737,755.00)	(1,709,382.00)	(1,594,225.00)
Acc Dep - stru & improv	(2,833,179.00)	(2,723,997.00)	(2,604,632.00)
Construction in progress	90,616.11	3,757.50	-
Equipment	1,849,716.30	1,830,175.69	1,769,859.00
Structure/improvement	4,760,618.00	4,760,618.00	4,760,618.00
Land	61,406.00	61,406.00	61,406.00
Total Property and Equipment	2,191,422.41	2,222,578.19	2,393,026.00
Other Assets			
Net OPEB Asset	1,199,826.00	1,225,311.00	2,522,763.00
Total Other Assets	1,199,826.00	1,225,311.00	2,522,763.00
<b>Total Assets</b>	<b>\$ 17,533,843.23</b>	<b>\$ 15,945,206.06</b>	<b>\$ 16,449,717.35</b>
<b>LIABILITIES AND CAPITAL</b>			
Current Liabilities			
Accounts payable	\$ 98,767.47	\$ 127,730.01	\$ 127,459.74
Acc payroll/vacation	210,892.93	201,023.94	208,228.89
Def inflow - 75	667,236.00	1,046,869.00	1,254,695.00
Def inflow pen defer GASB 68	272,874.00	1,941,395.00	208,602.00
Defer outflow pen cont GASB 68	(1,900,029.00)	(822,206.00)	(936,411.00)
Net pension liability GASB 68	4,327,920.00	2,034,280.00	3,603,091.00
Total Current Liabilities	\$ 3,677,661.40	\$ 4,529,091.95	\$ 4,465,665.63
<b>Total Liabilities</b>	<b>3,677,661.40</b>	<b>4,529,091.95</b>	<b>4,465,665.63</b>
Capital			
Designated fund balances	3,851,684.55	3,044,832.55	4,412,645.55
Investment in general fixed as	8,970,984.88	7,642,845.18	6,677,881.96
Net Income	1,033,512.40	728,436.38	893,524.21
Total Capital	13,856,181.83	11,416,114.11	11,984,051.72
<b>Total Liabilities &amp; Capital</b>	<b>\$ 17,533,843.23</b>	<b>\$ 15,945,206.06</b>	<b>\$ 16,449,717.35</b>

1 - Bank of the West account was closed June 2023.

2 - CAMP: Repair and Replace Fund was closed February 2023.

3 - CAMP: Public Health Emergency Fund was closed September 2022.

4 - CAMP: Operating Reserve Fund was closed February 2023.



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## MONTHLY STAFF REPORT –1121

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General Manager

### OPERATIONS REPORT

With low rainfall in December, very few larval detections of our three winter *Aedes spp.* mosquitoes were made by operations staff. Eggs laid in prior seasons by *Aedes squamiger*, *Aedes washinoi*, and *Aedes. sierrensis* need to be inundated by rainwater to hatch. Much of the rainfall received during the month percolated into the ground. Once the soil is saturated and the environmental conditions including temperature and water chemistry are right, eggs will begin to hatch. During the next few months, much of operations staff time will be dedicated to inspecting sources conducive to these three species who will begin moving through their larval stages. If left untreated these larvae typically pupate and emerge as adults in the latter part of March.

Each of the three aforementioned species, though in the same genera, have quite different life histories and ecological needs. *Ae. squamiger* tend to occur in diked salt marsh habitats. The adults have significant flight ranges flying up over fifteen miles from emergence sites. They are very aggressive day-biters feeding on large mammals, including humans. This mosquito was the primary reason our district was founded in 1930. *Ae. washinoi* is also quite aggressive and feeds on large mammals and humans but is very strongly associated to woodland areas with willow trees. Adults of this mosquito tend to not fly far from their emergence sites. Our final winter *Aedes spp.* *Ae. Sierrensis*, also known as the “western treehole mosquito” tends to utilize treeholes in woodland areas with oak and bay trees. This mosquito has the shortest average flight range of any of our mosquito species, tending to not travel more than a few hundred yards from emergence sites. It is an aggressive biter, locating and treating cryptic treehole sites in dense understory vegetation, including poison oak, can be challenging for operations staff. This mosquito is long lived as an adult and is capable of vectoring dog heartworm. They are also similar in both morphology and habits to two potential invasive *Ae. spp.* mosquitoes currently found in many California counties. Adults of this mosquito receives close scrutiny by both operations and lab staff to be sure potential invasive mosquitos are detected as early as possible.

Much of the treatment efforts by operations staff in December continued to focus on larvae of *Culiseta inornata*. detected in several marsh and vernal pool sources throughout our county. This species will continue to be active for several months to come. A few detections and some treatments were made for *Culex spp.* mosquitoes during the month though no further birds or mosquitoes tested positive for West Nile virus (WNV) by the ACMAD lab.

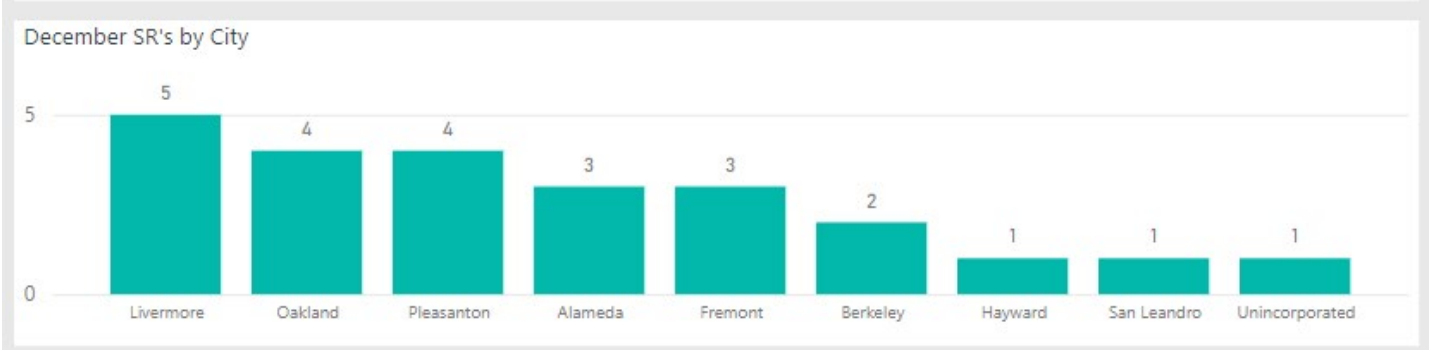
Requests for service received from the public in December totaled twenty-four. This was above the ten-year average for the month. Requests to “report a mosquito problem” totaled six, about half of these were attributable to non-biting “mosquito like” insects. Six requests to “report standing water” were responded to and six requests for mosquito fish for ornamental ponds, unmaintained swimming pools and livestock watering troughs were received. There were three requests to “report a dead bird” all of which were determined to be WNV negative. There were also three requests for an “insect I.D.” Several members of the ACMAD staff have entomological backgrounds and help identify insects provided to us by the public as an educational service.

*Field Operations Supervisor*  
*Joseph Huston*

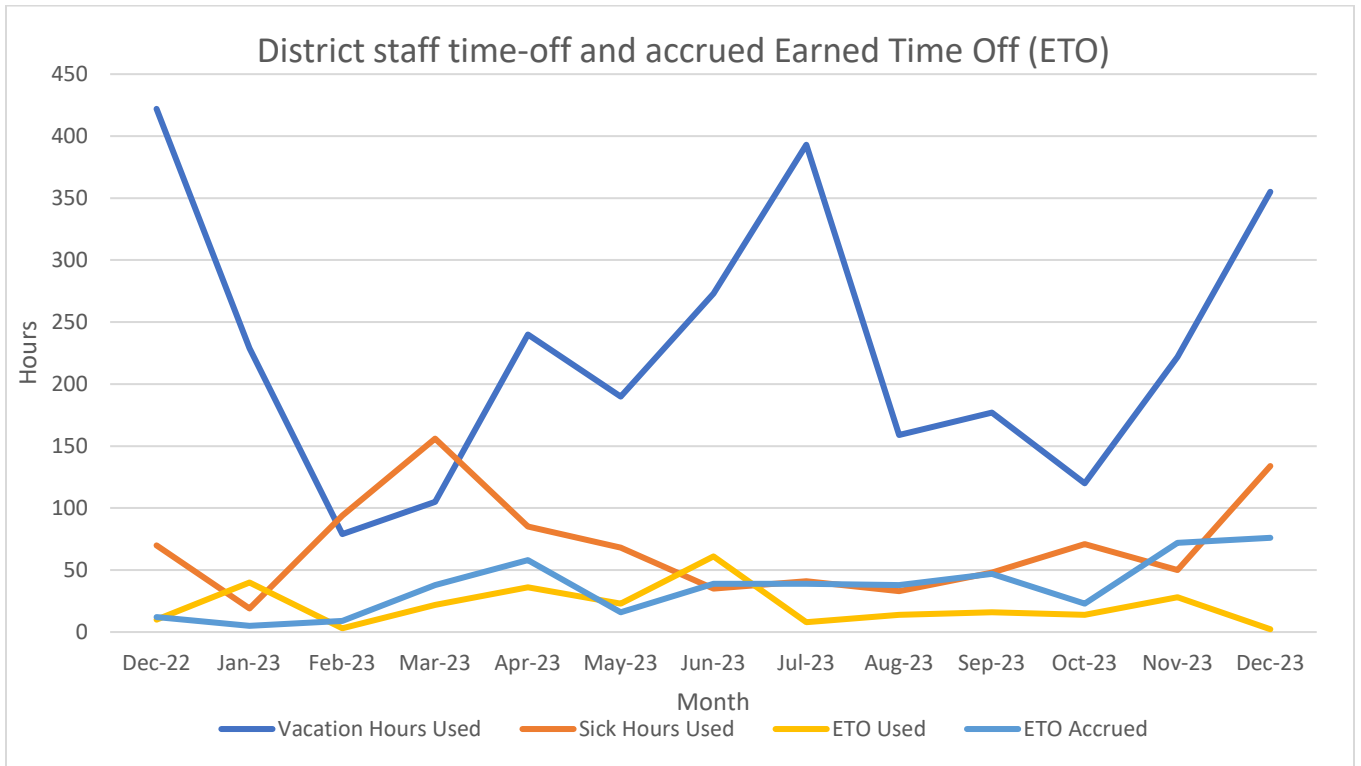


## Service Requests December 2023

December SR Count	December 10 Year Min Count	December 10 Year Max Count	December 10 Year Average
<b>24</b>	<b>5</b>	<b>40</b>	<b>18.70</b>

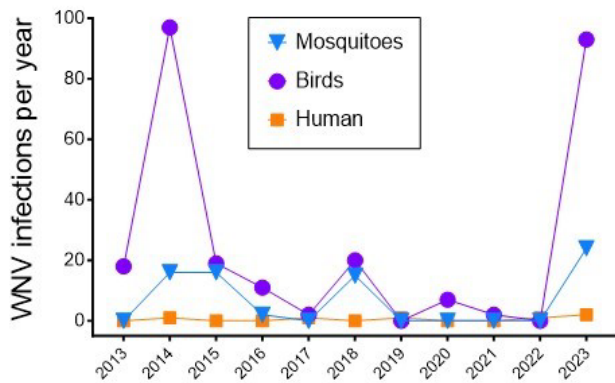


**Activity Report**

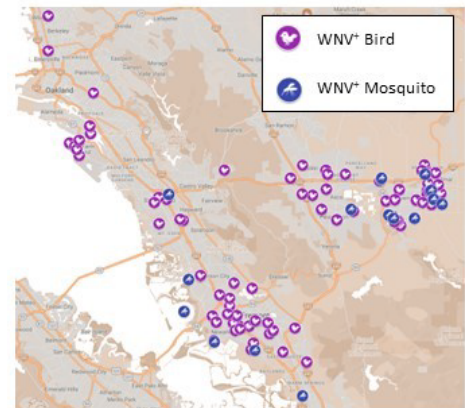


**WNV Activity**

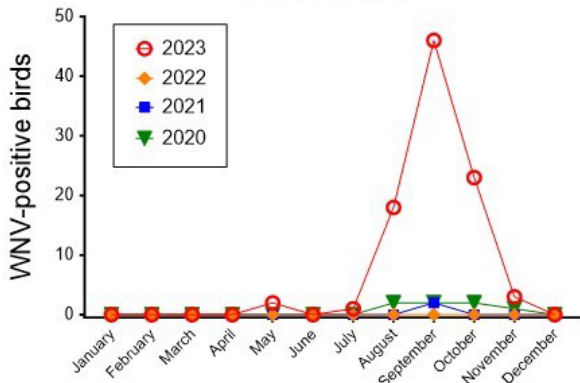
WNV infections detected in Alameda County 2013 – 2023



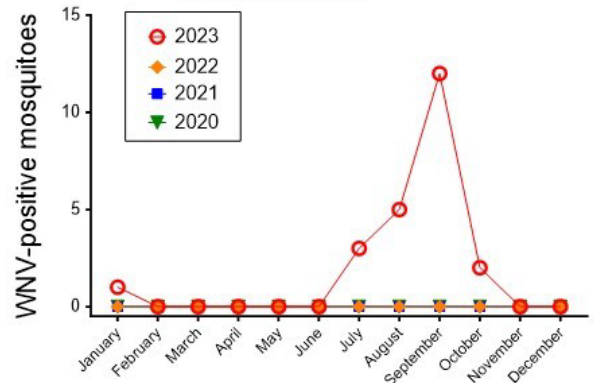
Locations of WNV-infected mosquitoes and birds in Alameda County during 2023



WNV-infected birds collected in Alameda County



WNV-infected mosquitoes collected in Alameda County



A. **LAB**

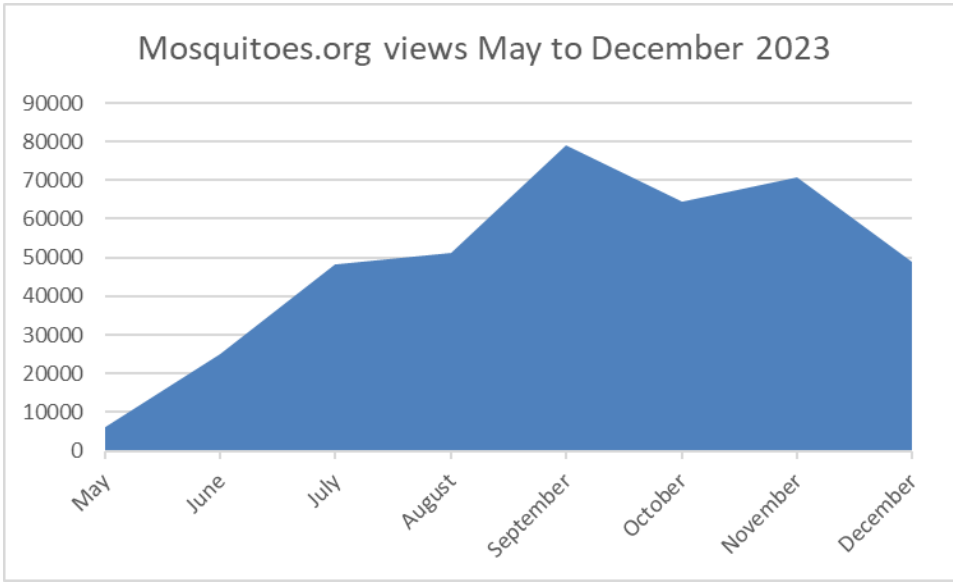
**Summary**

- *Arboviruses in mosquitoes.* Arboviruses were not detected in mosquitoes during December. For 2023, 24 of 884 mosquito pools that have been tested in the lab contained WNV (2.7 % of the mosquito pools were WNV-positive).
- *Arboviruses in birds.* West Nile virus (WNV) was not detected in birds during December. 93 birds have tested positive for WNV during 2023. Saint Louis encephalitis virus (SLEV) and Western equine encephalitis virus (WEEV) have not been detected in birds from Alameda County this year.
- *Native mosquitoes.* Cool and wet weather limited mosquito trapping during December. Sixteen CO<sub>2</sub> encephalitis virus survey (EVS) traps were placed during December, catching 84 adult female mosquitoes (5.3 mosquitoes per trap). SLEV and WEEV have not been detected mosquitoes from Alameda County for nearly two decades.
- *Human cases.* A third human WNV case was reported by Alameda County Public Health Department. To date, one case has been reported for Alameda, Livermore, and San Lorenzo.
- Invasive *Aedes* mosquitoes have not been detected in Alameda County during 2023.

Analysis and report by Eric Haas-Stapleton, PhD, Laboratory Director

**B. PUBLIC EDUCATION**

**Google Analytics**



48,838 site views in December

**Social media**

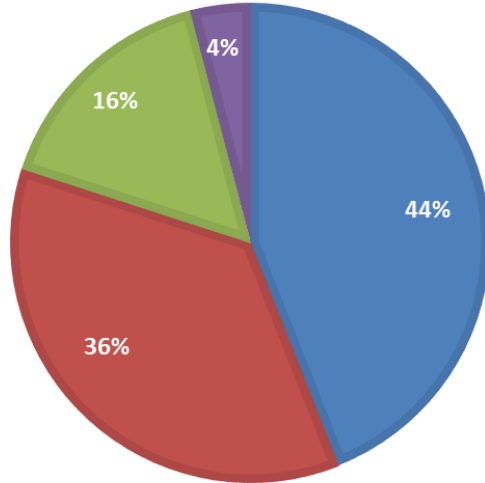
**Top Facebook Post**  
Posts: 8 Reach: 361 Followers: 524 (4 increase)

**Top Twitter Post**   
Posts: 8 Reach: 451 Followers: 827 (2 increase)

**Channel used for Service Request for December**

### CHANNELS USED FOR SERVICE REQUESTS

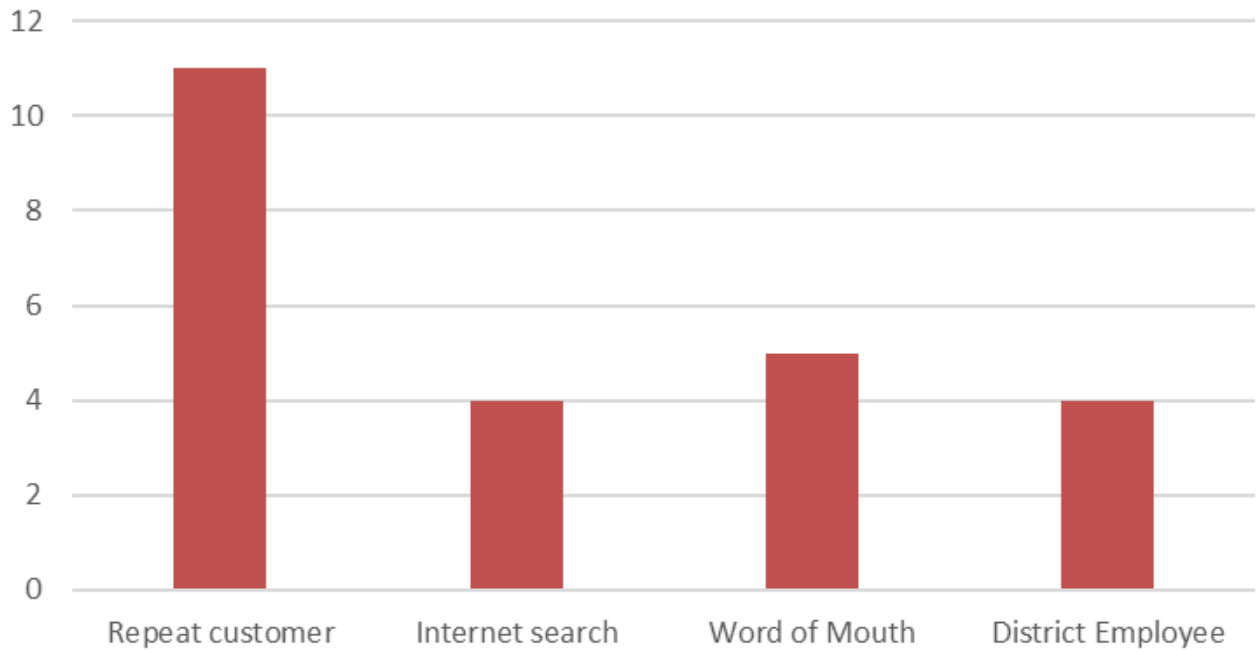
■ Website Submission ■ Call Into Office ■ Email ■ Text



Calls: 9 Email: 4 Online submissions: 10 Text: 1

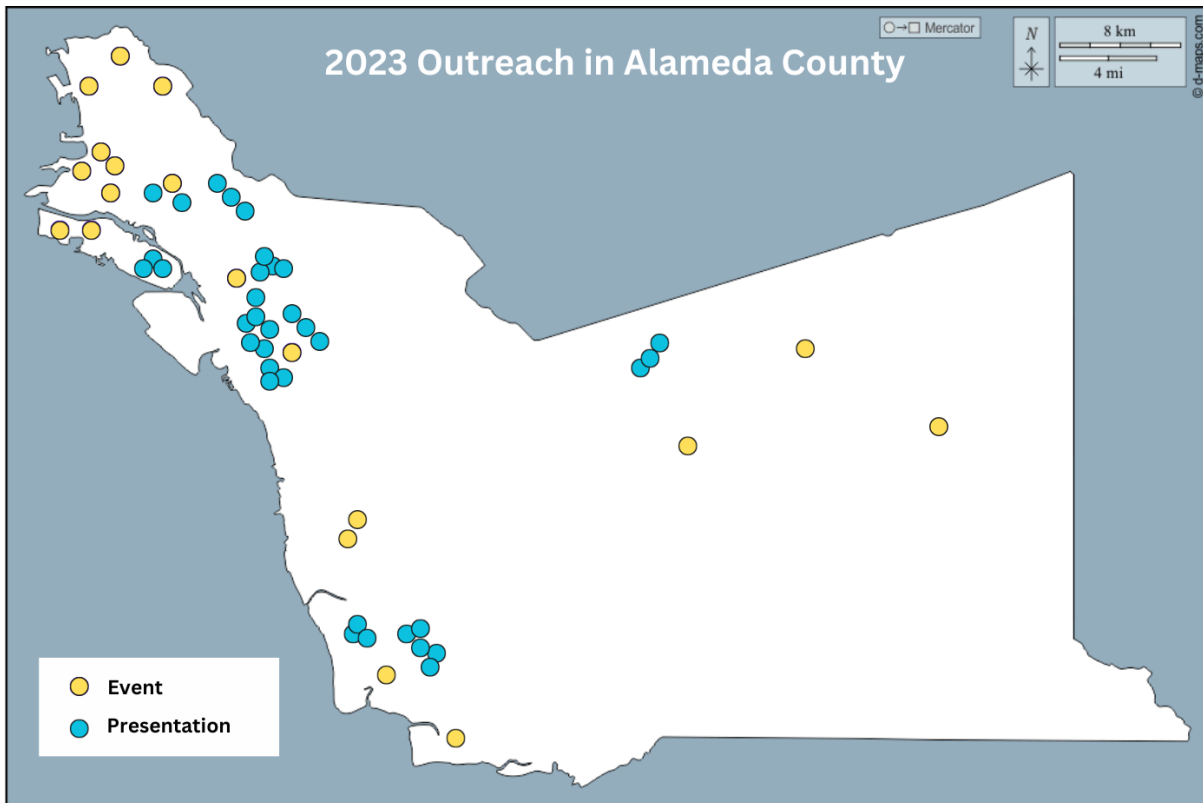
### Service Request Referral Summary for December

#### Service Request Referrals December 2023



# Outreach and communications wrap up 2023.

## In person outreach and engagement

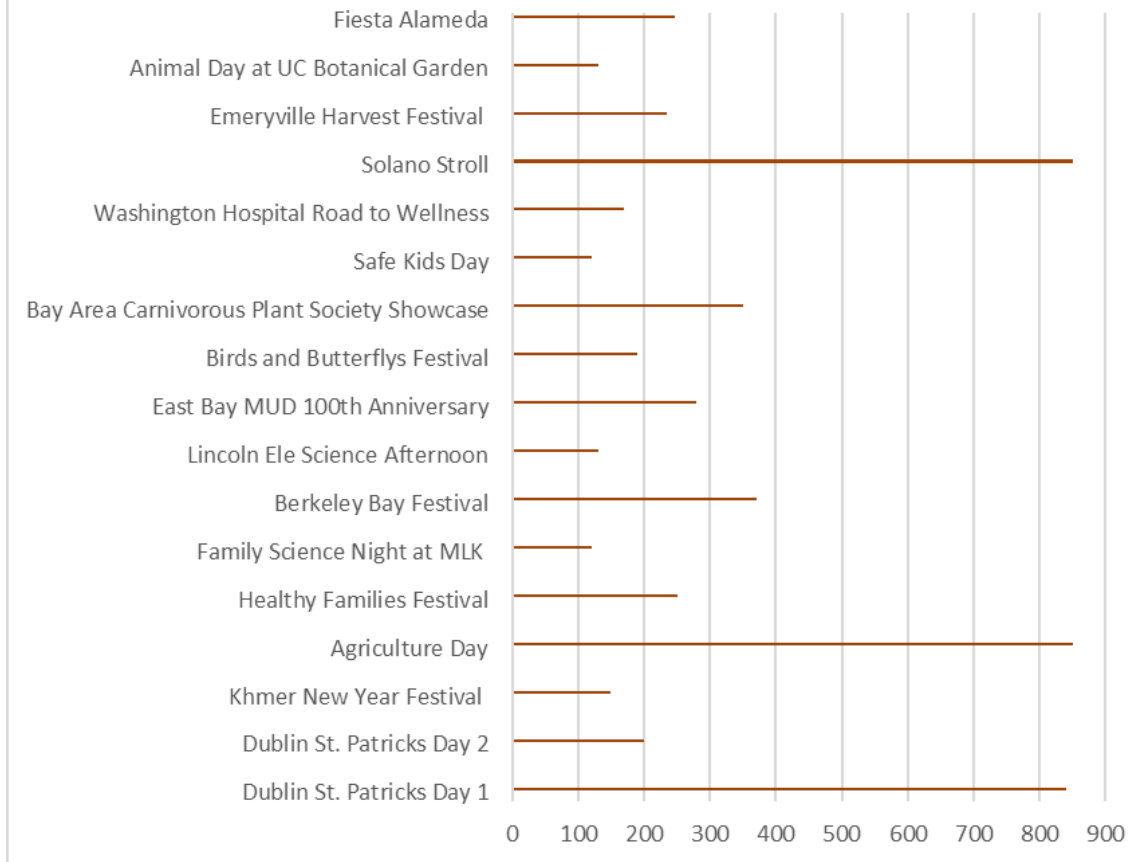


School Districts which hosted presentations: Newark Unified, Livermore Valley Junction Unified, Oakland Unified, San Leandro Unified and Alameda Unified

Summer camp presentations: Oakland and Castro Valley

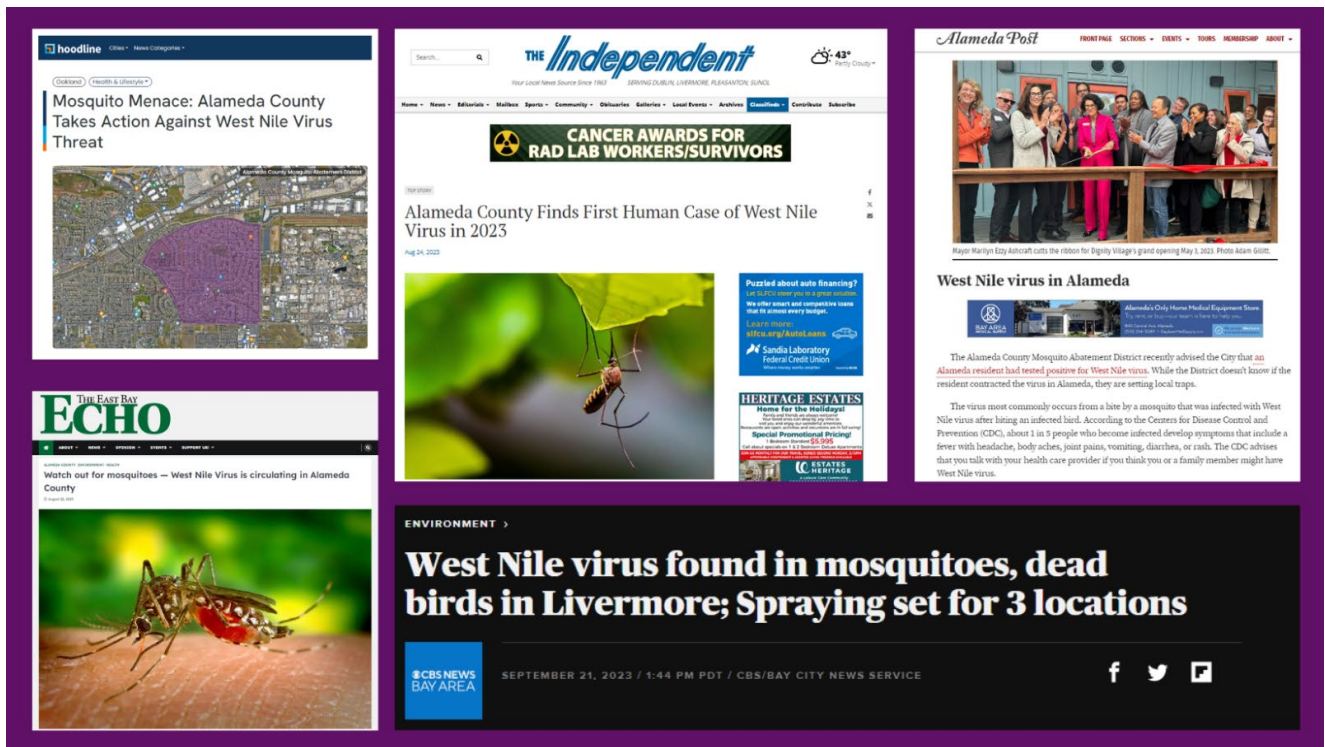
Event cities: Albany, Berkeley, Emeryville, Alameda, Oakland, San Leandro, Fremont, Newark, Pleasanton, Dublin, Livermore

## 2023 Events Number of Interactions



### District in the news

The district was the subject of at least fifteen news articles in 2023. Most news articles were lifted from the district press releases and repackaged specifically for the targeted community, such as the articles for Hoodline and The Independent. Judith Pierce was interviewed by the East Bay Echo about WNV and city of Alameda Mayor Marilyn Ezzy Ashcraft mentioned WNV and the district in her regular Mayor Update in the Alameda Post and in an Op-Ed for the East Bay Times.



## Online outreach and engagement

### Constant Contact






This service provides email outreach to individuals and organizations that have opted to receive email notifications. Users can sign up for specific notifications such as Quarterly Newsletters, Press Releases, Fogging Notices etc.

Quarterly newsletters (Spring, Summer, Fall and Winter) have an open rate between 53-63%

Press releases: In 2023 we sent out 8 press releases. We send out an advanced copy of the release to trustees, staff and specific government agencies (Alameda County Public Health Department, neighboring mosquito districts, specific city agencies) first and then send out the far-reaching press release to anyone who signed up for the notification. We also place the release on social media, where it is often picked up by local media and Patch.com which will amplify the message by posting it on their social media. Advanced notice press releases have between a 65% to 85% open rate, whereas the larger press releases have between a 50-60% open rate.

In the three weeks between adult mosquito control treatments in Livermore, 52 people signed up for notifications of adult mosquito control, or fogging notifications.



	<b>ACMAD Fall Newsletter 2023</b> <b>Sent</b> Email • Sent Sep 29, 2023 at 2:43pm PST <a href="#">269 send</a> • <a href="#">155 (63%) open</a> • <a href="#">3 (1%) click</a> • <a href="#">22 (8%) bounce</a> • <a href="#">2 (1%) unsubscribe</a>
	<b>Adult Mosquito Control treatment in Livermore on Thursday September</b> <b>Sent</b> Email • Sent Sep 20, 2023 at 4:45pm PST <a href="#">328 send</a> • <a href="#">165 (56%) open</a> • <a href="#">20 (7%) click</a> • <a href="#">32 (10%) bounce</a> • <a href="#">1 (1%) unsubscribe</a>
	<b>Advanced notice - ADC in Livermore 9.21.23</b> <b>Sent</b> Email • Sent Sep 20, 2023 at 4:26pm PST <a href="#">44 send</a> • <a href="#">27 (68%) open</a> • <a href="#">5 (13%) click</a> • <a href="#">4 (9%) bounce</a> • <a href="#">0 (0%) unsubscribe</a>
	<b>Adult Mosquito Control Treatment in Southwestern Livermore on Sept 13</b> <b>Sent</b> Email • Sent Sep 13, 2023 at 1:51pm PST <a href="#">289 send</a> • <a href="#">130 (50%) open</a> • <a href="#">14 (5%) click</a> • <a href="#">30 (10%) bounce</a> • <a href="#">0 (0%) unsubscribe</a>
	<b>ADVANCE NOTICE Adult Mosquito Control in Southwestern Livermore</b> <b>Sent</b> Email • Sent Sep 13, 2023 at 12:53pm PST <a href="#">44 send</a> • <a href="#">28 (68%) open</a> • <a href="#">6 (15%) click</a> • <a href="#">3 (7%) bounce</a> • <a href="#">0 (0%) unsubscribe</a>

## Mosquitoes.org

The public facing ACMAD website is hosted by Streamline, which is a web platform dedicated to serving Special Districts. Streamline website is structured to ensure information found on the site is compliant with California state laws for accessibility and fiscal transparency.

Google Analytics for the site changed in summer 2023, and we are still determining the most useful information we can get from the tool, given that Google Analytics 4 is heavily geared towards monetization. We had noticed for seven months in a row that user numbers would spike upwards, often to 3,000 or more, on the first and last days of each month, which seemed to indicate bot activity. We are looking forward a more accurate and useful analytics tool in the coming months.

Given the large amount of West Nile activity the county experienced this year, it is not a surprise that 4 of the top 10 pages this year were about West Nile virus. We also often refer to our website when mosquito like insects, such as gnats or crane flies, become common, and the page Mosquito Like Insects has historically been one of the top three pages individuals visit.

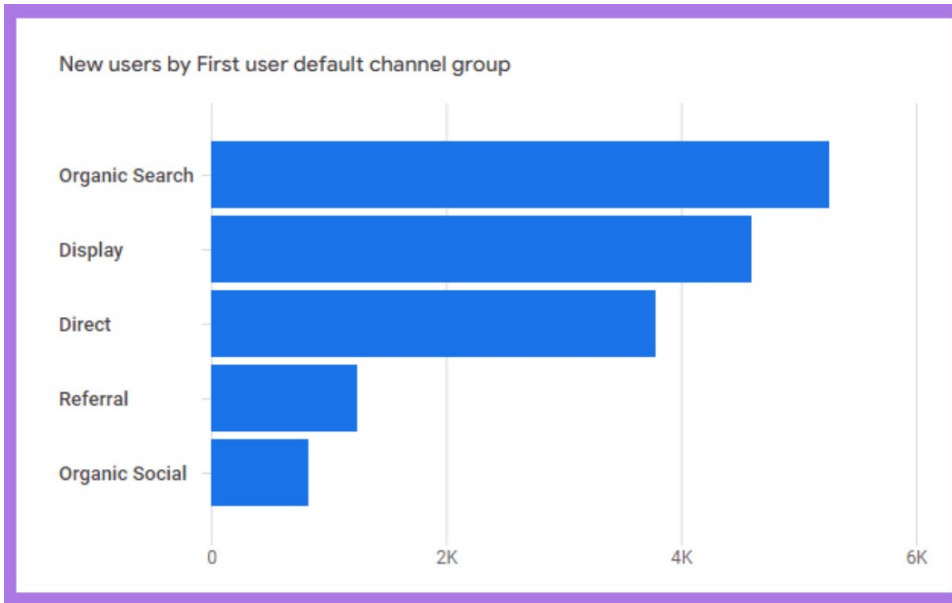
*Top 10 most viewed pages*

Most visited pages on mosquitoes.org		↓ Views	Users	Views per user
		26,912 100% of total	15,828 100% of total	1.70 Avg 0%
1	Alameda County Mosquito Abatement District	10,857	8,748	1.24
2	Mosquito-Like Insects - Alameda County Mosquito Abatement District	4,118	3,563	1.16
3	California Species - Alameda County Mosquito Abatement District	1,070	732	1.46
4	August 31, 2023 Adult Mosquito Control Scheduled in Eastern Livermore Area to Suppress West Nile Virus Activity - Alameda County Mosquito Abatement District	962	738	1.30
5	West Nile Virus Activity - Alameda County Mosquito Abatement District	792	444	1.78
6	West Nile Virus - Alameda County Mosquito Abatement District	680	504	1.35
7	September 13, 2023 Adult Mosquito Control Scheduled in Southwestern Livermore Area to Suppress West Nile Virus Activity - Alameda County Mosquito Abatement District	515	356	1.45
8	Contact Us - Alameda County Mosquito Abatement District	444	318	1.40
9	Chemical Control - Alameda County Mosquito Abatement District	399	309	1.29
10	Services - Alameda County Mosquito Abatement District	363	259	1.40

*Top 10 locations of website users*

City	↓ Users	New users	Engaged sessions
	15,828 100% of total	15,716 100% of total	3,157 100% of total
1 (not set)	3,965	3,792	116
2 Hampton	945	943	0
3 San Jose	831	810	256
4 Livermore	577	569	164
5 San Francisco	531	520	133
6 Ashburn	344	343	3
7 Columbus	338	337	4
8 Los Angeles	315	307	94
9 Fremont	311	303	126
10 Oakland	301	296	114

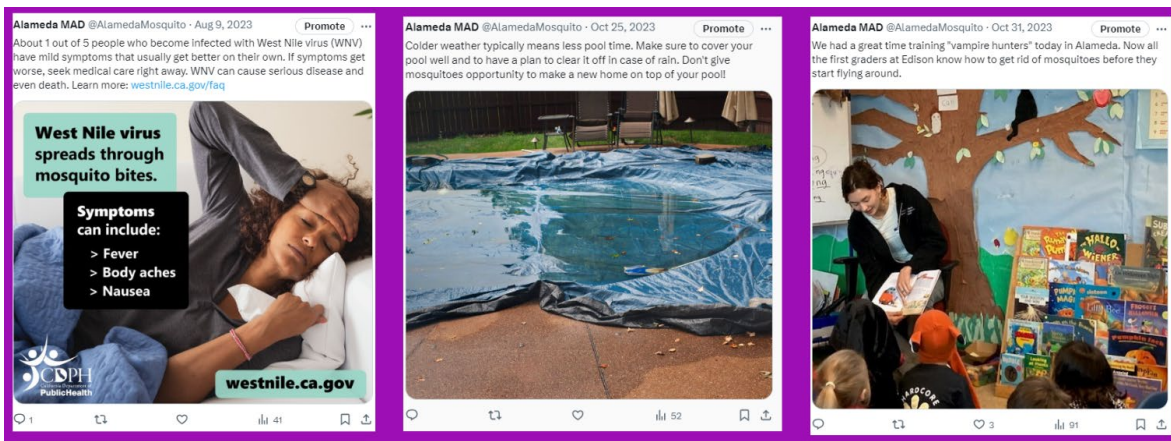
How users find the website



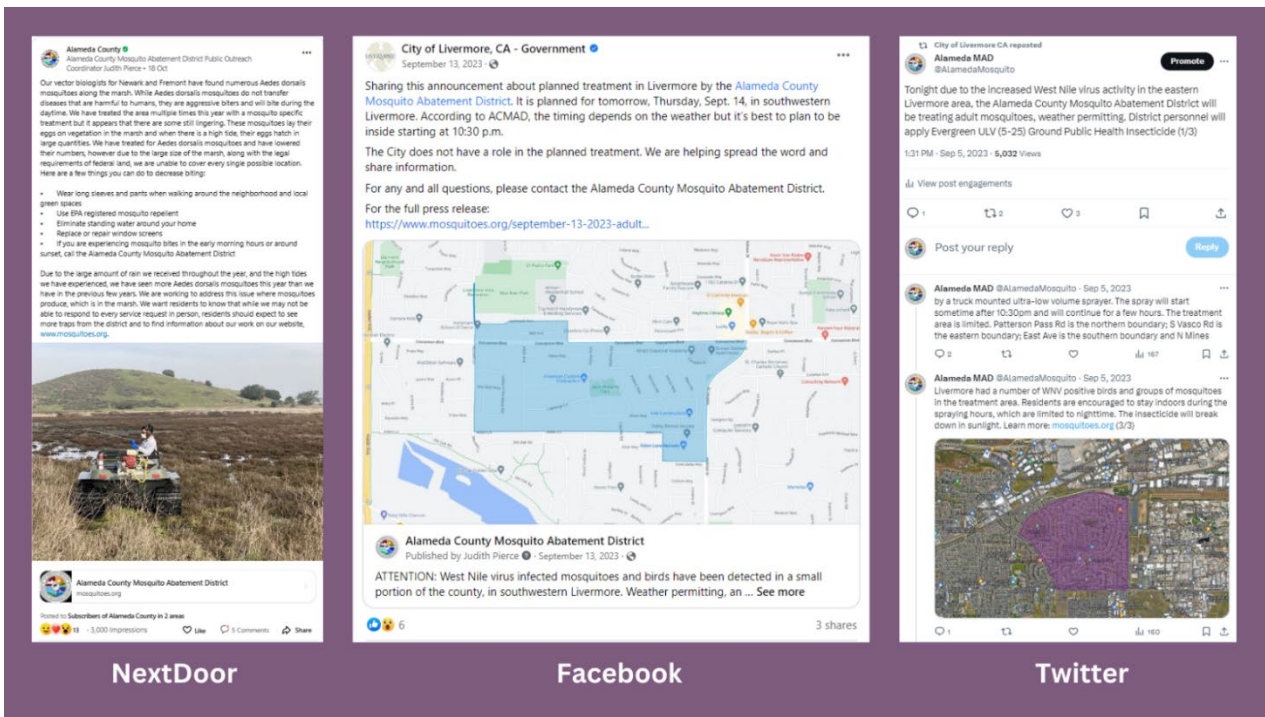
**Social Media:** Facebook, NextDoor and Twitter

Social media continues to be a low cost, easy and effective means to disseminate information to a large audience. For Facebook and Twitter, the district’s number of followers continued to grow in 2023. The district gained 33 followers on Twitter and 138 followers on Facebook. Given the large amount of agencies and individuals who have left Twitter since ownership changed in October 2022, we expect small numbers for the social network.

Regular posts are a mix of mosquito prevention reminders, news articles about mosquitoes, and reposts of partner organizations content.



Posts about adult mosquito control operations had the furthest reach, one post received over 5,000 impressions. We worked with the city of Livermore Public Information and Police departments to amplify the message before each operation, and will continue to reach out to local officials for future treatments. NextDoor is a great tool for targeting specific communities, and we set aside time to answer questions on the website after each post.



**Internet Ads**

The district contracts with a LocalIQ, a service to place ads on websites and social media. In 2022 the district used LemonLight, a digital video production company to make a short commercial and translated it into Spanish and Chinese. The LocalIQ ads are a combination of video and static ads. The district plans to make another video in 2024.

**Your campaigns have resulted in 42 lead events year to date.**

Jan 01, 2023 to Dec 12, 2023 Frequency: Weekly All Campaigns



Lead events means a person made a service request on the mosquitoes.org website

**SOCIAL REACH**

**You're reaching an average of 6,562 people each day on social networks.**

Jan 01, 2023 to Dec 12, 2023 Frequency: Weekly All Campaigns

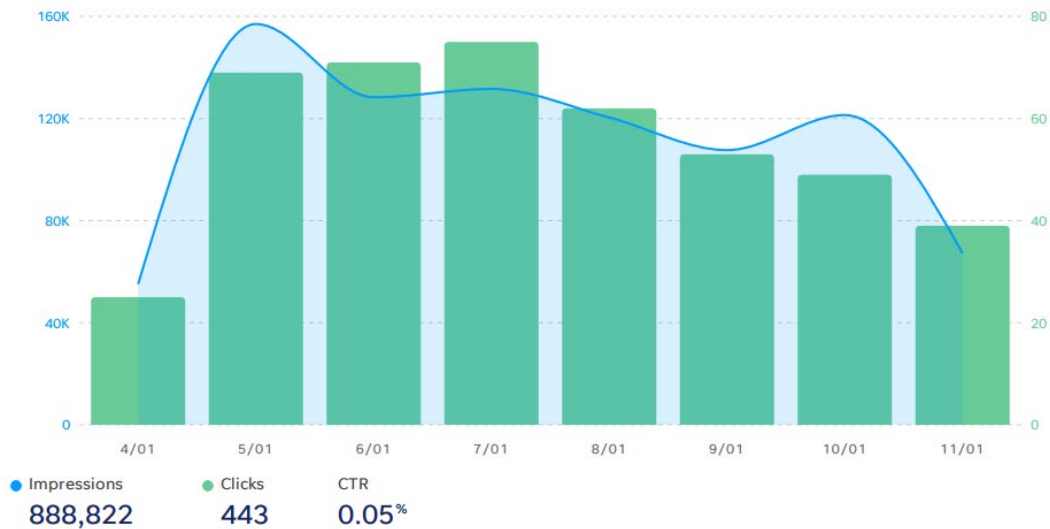


Social networks include Facebook, Instagram and YouTube. They see the video ad, not the static image ads.

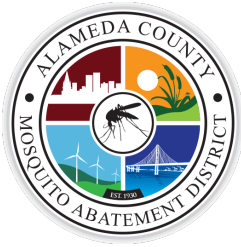
**IMPRESSIONS AND CLICKS**

**Your ads drove 443 clicks year to date.**

Jan 01, 2023 to Dec 12, 2023 Frequency: Monthly 29 Campaigns



For the static ad on websites, 443 clicked on the ad and went to the mosquitoes.org website. 888,822 people saw the static ad on a website.



23187 Connecticut Street  
Hayward, CA 94545

T: (510) 783-7744  
F: (510) 783-3903

[acmad@mosquitoes.org](mailto:acmad@mosquitoes.org)

### Trustee & Staff Anniversary Recognitions:

#### Board of Trustees

**President**

Victor Aguilar

**San Leandro**

**Vice-President**

Cathy Roache

**County-at-Large**

**Secretary**

Tyler Savage

**Alameda**

Robin López

**Albany**

P. Robert Beatty

**Berkeley**

Kashef Qaadri

**Dublin**

Courtney Welch

**Emeryville**

John Zlatnik

**Fremont**

George Syrop

**Hayward**

*vacant*

**Livermore**

Eric Hentschke

**Newark**

Jan O. Washburn

**Oakland**

Hope Salzer

**Piedmont**

Valerie Arkin

**Pleasanton**

Subru Bhat

**Union City**

**Ryan Clausnitzer**

*General Manager*

**Background:**

ACMAD is pleased to recognize and thank the following Trustees and Staff on their anniversaries in January.

Trustee	City	Years of Service	Anniversary Date
Eric Hentschke	Newark	8	January 14 <sup>th</sup>
Subru Bhat	Union City	6	January 9 <sup>th</sup>
Tyler Savage	Alameda	2	January 4 <sup>th</sup>
Employee	Title	Years of Service	Anniversary Date
Danny Sharkey	Mosquito Control Technician	1	January 9 <sup>th</sup>

# ACHIEVING DISTRICT GOALS... TOGETHER.

## Three Opportunities for Training Throughout The State!



- February 4 – 7, 2024 - San Luis Obispo
- April 14 – 17, 2024 – San Diego
- November 3 – 6, 2024 – San Rafael

*All New Sessions for Returning Attendees (San Diego and San Rafael)*



CSDA's 2024  
**Special District  
Leadership Academy Conference**

*A Comprehensive Governance Leadership Conference for Elected and Appointed Directors/Trustees*



**California Special  
Districts Association**  
*Districts Stronger Together*

# BOARD & STAFF LEARN TO WORK AS A TEAM.

Participate in the **Special District Leadership Academy Conference** and complete all four modules of the Academy during the course of two and a half days.

This conference content is based on CSDA's Special District Leadership Academy (SDLA) groundbreaking, curriculum-based continuing education program, which recognizes the necessity for the board and general manager to work closely toward a common goal. SDLA provides the knowledge base to perform essential governance responsibilities and is designed for both new and experienced special district board members.



Complete all Four Modules of the **Special District Leadership Academy** as Virtual Workshops

**Module 1: Governance Foundations**

February 21 – 22, 2024

9:00 a.m. – 12:00 p.m. each day

**Module 2: Setting Direction / Community Outreach**

April 3 – 4, 2024

9:00 a.m. – 12:00 p.m. each day

**Module 3: Board's Role in Finance and Fiscal Accountability**

September 25 – 26, 2024

9:00 a.m. – 12:00 p.m. each day

**Module 4: Board's Role in Human Resources**

December 4 – 5, 2024

9:00 a.m. – 12:00 p.m. each day



FOR DIRECTORS AND TRUSTEES

## CERTIFICATE IN SPECIAL DISTRICT GOVERNANCE

Designed to acknowledge special district board members and trustees who have taken extra steps to become better educated in core areas of governance.

Complete the Special District Leadership Academy + 10 additional professional development hours and receive this recognition.



# ATTEND

## CSDA'S SPECIAL DISTRICT LEADERSHIP ACADEMY CONFERENCE

Local boards are the reason why local control is local. Special district boards are the voices of the community, and they are also a large reason why special districts exist.

The truth is that every elected or appointed public official needs to worry about governance; governance is what boards do. It's what they bring to the table.

Governance is taking the wishes, needs, and desires of the community and transforming them into policies that govern the district.

***Whether you're new to the board or someone who has served for many years, this conference provides essential tools and information to effectively govern your district!***

### Attendees will learn:

- Working as a team: The roles of the board and staff in your district
- Attributes and characteristics of highly effective boards
- How culture, norms, values, and operating styles influence the district
- Specific jobs that the board must perform
- How individual values, skills, and knowledge help to shape how effective boards operate
- The importance of moving from "I" to "we" as the governance team
- The board's role in setting direction for the district
- The board's role in finance and fiscal accountability
- And much more!



### SDRMA Credit Incentive Points

Special District Risk Management Authority (SDRMA) is committed to establishing a strategic partnership with our members to provide maximum protection, help control losses, and positively impact the overall cost of property/liability and workers' compensation coverage through the Credit Incentive Program. Credit incentive points can be earned based on an agency's attendance at the Special District Leadership Academy Conference, reducing SDRMA member's annual contribution amount.



SHOWCASE YOUR DISTRICT'S  
COMMITMENT TO EXCELLENCE

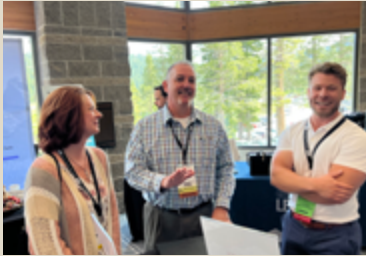
# DISTRICT OF DISTINCTION ACCREDITATION

Designed as a way for districts to highlight their prudent fiscal practices along with other areas important to effectively operate and govern a special district.



# FIRST-TIME ATTENDEE

## SCHEDULE OF EVENTS



### SUNDAY

**5:30 – 7:00 p.m.**  
**REGISTRATION AND NETWORKING RECEPTION**

Take a moment to connect with your peers from throughout the state at this informal networking reception. Reception includes light appetizers.

### TUESDAY

**8:30 – 10:00 a.m.**  
**FULFILLING YOUR DISTRICT'S MISSION: CHARTING THE COURSE**

*\* This session covers Module 2 of the Special District Leadership Academy: Setting Direction/Community Leadership*

This conference session will highlight the importance of setting the direction for your district. Learn the critical components of direction-setting for your district along with how to avoid planning pitfalls. Attendees will walk through the steps of establishing and fulfilling your district's mission, vision, values, strategic goals, and how to communicate those objectives to your constituents.

**10:00 – 10:30 a.m.**  
**BREAK (All Attendees)**

**10:30 – 12:00 p.m.**  
**FULFILLING YOUR DISTRICT'S MISSION: CHARTING THE COURSE (continued)**

**12:00 – 1:00 p.m.**  
**LUNCH PROVIDED (All Attendees)**

**1:15 – 2:45 p.m.**  
**GET THE WORD OUT! BEST PRACTICES FOR COMMUNICATION AND OUTREACH**

*\* This session covers Module 2 of the Special District Leadership Academy: Setting Direction/Community Leadership.*

This conference session looks at common communication breakdowns and potential areas for improvement in public agency communications. It will discuss proper and effective communication methods to be aware of as a governing official including:

- Identifying audiences
- Responding to public input
- Media relations
- Legislative outreach and advocacy

**2:45 – 3:00 p.m.**  
**BREAK (All Attendees)**

### MONDAY

**8:30 – 10:00 a.m.**  
**BUILDING A FOUNDATION FOR GOOD GOVERNANCE**

*\* This session covers Module 1 of the Special District Leadership Academy: Governance Foundations.*

In this conference session, the instructor will lay the groundwork for good governance in your district.

Attendees will discover:

- Why good governance is so important to the overall wellbeing of the district
- The traits of effective board members
- What good governance means and how to effectively put it into practice
- How to move your board from "I" to "we," including how to become an effective team, establish team standards, and essential conditions for team building

**10:00 – 10:30 a.m.**  
**BREAK (All Attendees)**

**10:30 a.m. – 12:30 p.m.**  
**BUILDING A FOUNDATION FOR GOOD GOVERNANCE (continued)**

**12:30 – 1:30 p.m.**  
**LUNCH PROVIDED (All Attendees)**

**1:45 – 3:00 p.m.**  
**DEFINING BOARD/STAFF ROLES AND RELATIONSHIPS**

*\* This session covers Module 4 of the Special District Leadership Academy: Board's Role in Human Resources.*

This conference session will teach participants how to determine the human resource (HR) health of their district and what areas to focus on as a board and individual governing official including:

- Identifying the board's role in human resources
- Recognizing HR red flags and positive indicators
- Developing and maintaining essential HR policies
- Covering confidentiality and legal liabilities
- Evaluating the general manager

**3:00 – 3:30 p.m.**  
**BREAK (All Attendees)**

**3:30 – 4:30 p.m.**  
**DEFINING BOARD/STAFF ROLES AND RELATIONSHIPS (continued)**

**5:30 – 7:00 p.m.**  
**SIP AND SAVOR EVENING RECEPTION**



*Sponsored by the Special District Risk Management Authority (SDRMA)*

Join us for a lively evening of networking and refreshments.



**3:00 – 4:00 p.m.**

**GET THE WORD OUT! BEST PRACTICES FOR COMMUNICATION AND OUTREACH**  
(continued)

**OPEN EVENING**

## WEDNESDAY

**8:30 – 10:00 a.m.**

**SHOW ME THE MONEY! WHAT DO BOARD MEMBERS NEED TO KNOW ABOUT DISTRICT FINANCES?**

*\* This session covers Module 3 of the Special District Leadership Academy: Board's Role in Finance and Fiscal Accountability.*

This conference session will provide a review and insight of important financial concepts, reports, and policies specific to public agencies including special districts.

Attendees will learn:

- How to ask the right questions.
- How to link the finance process to the district mission and goals.
- Budget process, budget assessment, and communicating budget information to the public.
- How to develop and analyze capital improvement plans and reserve guidelines.

**10:00 – 10:15 a.m.**

**BREAK** (All Attendees)

**10:15 a.m. – 12:00 p.m.**

**SHOW ME THE MONEY! WHAT DO BOARD MEMBERS NEED TO KNOW ABOUT DISTRICT FINANCES?** (continued)

**12:00 p.m.**

**GRADUATION CERTIFICATE DISTRIBUTION**

*First-time attendees must attend all sessions and turn in their completed certificate application in order to receive their certificate at the conclusion of the conference.*

# RETURNING ATTENDEE

## SCHEDULE OF EVENTS

**SDLA Graduate? Join us for our Returning Attendee Track with Two Days of Breakout Sessions with topics such as:**

- **Promoting Civility in a Time of Heightened Partisanship and Polarization**
- **Rules of Engagement**
- **Community Outreach**
- **Financial Reporting**
- **Board / Manager Relationship Best Practices**
- **Leading Challenging Board Meetings**

Check the SDLA Website for Returning Attendee Track Session details when agenda is confirmed. Returning Attendee Track available only in San Diego and San Rafael.



## SUNDAY

5:30 – 7:00 p.m.

**REGISTRATION AND NETWORKING RECEPTION**

Take a moment to network with your peers from throughout the state at this informal networking reception. Reception includes light appetizers.

## MONDAY

**8:30 a.m. – 12:30 p.m.**  
**BREAKOUT SESSIONS**

**10:00 – 10:30 a.m.**  
**BREAK (ALL ATTENDEES)**

**12:30 – 1:30 p.m.**  
**LUNCH PROVIDED (ALL ATTENDEES)**

**1:45 – 4:30 p.m.**  
**BREAKOUT SESSIONS**

**3:00 – 3:30 p.m.**  
**BREAK (ALL ATTENDEES)**

**5:30 – 7:00 p.m.**  
**SIP AND SAVOR EVENING RECEPTION**

*Sponsored by the Special District Risk Management Authority (SDRMA)*



Join us for an entertaining evening of networking and refreshments.

## TUESDAY

**8:30 a.m. – 12:00 p.m.**  
**BREAKOUT SESSIONS**

**10:00 – 10:30 a.m.**  
**BREAK (ALL ATTENDEES)**

**12:00 – 1:00 p.m.**  
**LUNCH PROVIDED (ALL ATTENDEES)**

**1:15 – 4:00 p.m.**  
**BREAKOUT SESSIONS**

**2:45 – 3:00 p.m.**  
**BREAK (ALL ATTENDEES)**

**4:00 p.m.**  
**CONFERENCE ENDS FOR RETURNING ATTENDEES**



**February 4 – 7, 2024**

**Embassy Suites  
by Hilton San Luis Obispo**

333 Madonna Rd, San Luis Obispo, CA 93405

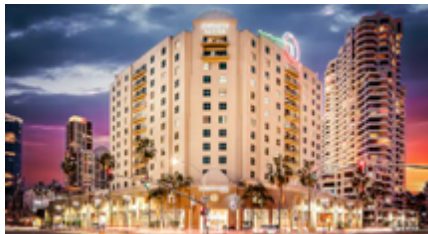
HOTEL ROOM RESERVATIONS: CSDA room reservations in the CSDA room block start at the rate of \$149 plus tax and fees per day. The room reservation cut-off is January 11, 2024; however, space is limited and may sell out before this date. Information regarding hotel reservations and link to book in the CSDA room block will be emailed within 24 hours of registration.

CSDA rate includes: complimentary full, cooked-to-order breakfast buffet, complimentary Nightly Managers Reception, and complimentary guest room Wi-Fi.



**EARLY BIRD DISCOUNT:** The early bird discount for this location requires registration on or before Thursday, January 11, 2024.

Cancellations must be in writing and received by CSDA no later than January 11, 2024, at 5:00 p.m. All cancellations received by this date will be refunded less a \$75 cancellation fee. There will be no refunds for cancellations made after January 11, 2024. Substitutions are acceptable and must be done in writing no later than January 26, 2024, at 5:00 p.m. Please submit any cancellation notice or substitution requests to [meganh@csda.net](mailto:meganh@csda.net) or fax to 916-520-2465.



**April 14 – 17, 2024**

**Embassy Suites  
by Hilton San Diego Bay Downtown**

601 Pacific Hwy, San Diego, CA 92101

HOTEL ROOM RESERVATIONS: CSDA room reservations in the CSDA room block are available at the rate of \$194\* or prevailing federal per diem at time of check in plus tax. The room reservation cut-off is March 19, 2024; however, space is limited and may sell out before this date. Information regarding hotel reservations and link to book in the CSDA room block will be emailed within 24 hours of registration. \*current federal per diem as of 9/14/23 but subject to change

CSDA rate includes: complimentary full, cooked-to-order breakfast buffet, complimentary Nightly Managers Reception, \$40/night overnight parking, and complimentary guest room Wi-Fi.



**EARLY BIRD DISCOUNT:** The early bird discount for this location requires registration on or before Tuesday, March 19, 2024.

Cancellations must be in writing and received by CSDA no later than March 19, 2024, at 5:00 p.m. All cancellations received by this date will be refunded less a \$75 cancellation fee. There will be no refunds for cancellations made after March 19, 2024. Substitutions are acceptable and must be done in writing no later than April 5, 2024, at 5:00 p.m. Please submit any cancellation notice or substitution requests to [meganh@csda.net](mailto:meganh@csda.net) or fax to 916-520-2465.



**November 3 – 6, 2024**

**Embassy Suites  
by Hilton San Rafael - Marin County**

101 McInnis Parkway, San Rafael, CA 94903

HOTEL ROOM RESERVATIONS: CSDA room reservations in the CSDA room block start at the rate of \$166 plus tax and fees per day. The room reservation cut-off is October 13, 2024; however, space is limited and may sell out before this date. Information regarding hotel reservations and link to book in the CSDA room block will be emailed within 24 hours of registration.

CSDA rate includes: complimentary full, cooked-to-order breakfast buffet, complimentary Nightly Managers Reception, \$7/night overnight parking, and complimentary guest room Wi-Fi.



**EARLY BIRD DISCOUNT:** The early bird discount for this location requires registration on or before Sunday, October 13, 2024.

Cancellations must be in writing and received by CSDA no later than October 13, 2024, at 5:00 p.m. All cancellations received by this date will be refunded less a \$75 cancellation fee. There will be no refunds for cancellations made after October 13, 2024. Substitutions are acceptable and must be done in writing no later than October 25, 2024, at 5:00 p.m. Please submit any cancellation notice or substitution requests to [meganh@csda.net](mailto:meganh@csda.net) or fax to 916-520-2465.



# 2024 Registration Form

## Special District Leadership Academy Conference

(Use one form per registrant)

### Three Ways to Register

- **Register online** by visiting the SDLA Conference website at [sdla.csda.net](http://sdla.csda.net).
- **Fax number:** 916-520-2465. All faxed registration forms must include credit card payment.
- **Mail:** CSDA, 1112 I Street, Suite 200, Sacramento, CA 95814. Please include registration form and payment. Checks should be made payable to: California Special Districts Association.

### Not sure if you are a member?

Contact the CSDA office at 877-924-2732 to find out if your agency or company is already a member. To learn more about the many benefits of CSDA membership, contact Member Services Director Cassandra Strawn at [membership@csda.net](mailto:membership@csda.net) or call toll-free at the number listed above.



Name/Title:		
<input type="checkbox"/> First-time Attendee <input type="checkbox"/> Returning Attendee		
District:		
Address:		
City:	State:	Zip:
Phone:	Fax:	
<input type="checkbox"/> Member <input type="checkbox"/> Non-member	Email:	
Emergency Contact - Name & Phone:		
<b>WHICH CONFERENCE WILL YOU BE ATTENDING?</b>		
<input type="checkbox"/> FEBRUARY 4 – 7, 2024 - SAN LUIS OBISPO EARLY BIRD DISCOUNT: JANUARY 11, 2024  <input type="checkbox"/> CSDA Member                 \$720 <input type="checkbox"/> Non-member                     \$1,080  <b>AFTER JANUARY 11</b> <input type="checkbox"/> CSDA Member                 \$775 <input type="checkbox"/> Non-member                     \$1,160	<input type="checkbox"/> APRIL 14 – 17, 2024 - SAN DIEGO EARLY BIRD DISCOUNT: MARCH 19, 2024  <input type="checkbox"/> CSDA Member                 \$720 <input type="checkbox"/> Non-member                     \$1,080  <b>AFTER MARCH 19</b> <input type="checkbox"/> CSDA Member                 \$775 <input type="checkbox"/> Non-member                     \$1,160	<input type="checkbox"/> NOVEMBER 3 – 6, 2024 - SAN RAFAEL EARLY BIRD DISCOUNT: OCTOBER 13, 2024  <input type="checkbox"/> CSDA Member                 \$720 <input type="checkbox"/> Non-member                     \$1,080  <b>AFTER OCTOBER 13</b> <input type="checkbox"/> CSDA Member                 \$775 <input type="checkbox"/> Non-member                     \$1,160
<b>SEND MORE - SAVE MORE! -- SPECIAL DISCOUNTED PRICING!</b>		
<b>ADDITIONAL ATTENDEE FROM THE SAME DISTRICT BEFORE EARLY BIRD DISCOUNT</b> <input type="checkbox"/> CSDA Member                 \$490 <input type="checkbox"/> Non-member                     \$735	<b>ADDITIONAL ATTENDEE FROM THE SAME DISTRICT AFTER EARLY BIRD DISCOUNT</b> <input type="checkbox"/> CSDA Member                 \$545 <input type="checkbox"/> Non-member                     \$820	
<b>Payment</b>		
<input type="checkbox"/> Check <input type="checkbox"/> Visa <input type="checkbox"/> MasterCard <input type="checkbox"/> Discover <input type="checkbox"/> American Express		
Acct. Name:		Acct. Number:
Expiration Date:	CVC:	Authorized Signature:
<b>Special Needs (including Dietary, all special dietary needs must be indicated in advance of conference)</b>		
<input type="checkbox"/> Vegetarian <input type="checkbox"/> Other:		

**Consent to Use Photographic Images:** Registration and attendance at, or participation in, CSDA meeting and other activities constitutes an agreement by the registrant to CSDA's use and distribution (both now and in the future) of the registrant or attendee's image or voice in photographs, videotapes, electronic reproductions, and audiotapes of such events and activities.

**Anti-Discrimination and Harassment Policy:** CSDA is dedicated to a harassment-free event experience for everyone. Our Anti-Discrimination and Harassment Policy can be found under "CSDA Transparency" at [www.csda.net/about-csda/who-we-are](http://www.csda.net/about-csda/who-we-are).



## Steady as you go.

When your team and ours all pull together, you get the sure-footed stability you need to proceed with confidence. As an extension of your staff, we are always at the sidelines delivering service and expertise. For everything from Workers' Compensation and Property/Liability coverages to Health Benefits options available throughout California, we are here to keep you going strong. For more information, visit [sdrma.org](http://sdrma.org).

**SDRMA**  
SPECIAL DISTRICT RISK MANAGEMENT AUTHORITY

*Maximizing Protection. Minimizing Risk.*

800-537-7790 • [SDRMA.ORG](http://SDRMA.ORG)