

AGENDA
1064th MEETING OF THE BOARD OF TRUSTEES
OF THE ALAMEDA COUNTY MOSQUITO ABATEMENT DISTRICT

JANUARY 9TH, 2019

TIME: 5:00 P.M.
PLACE: Office of the District, 23187 Connecticut Street, Hayward
TRUSTEES: Elisa Marquez, President, City of Hayward
Wendi Poulson, Vice-President, City of Alameda
Eric Hentschke, Secretary, City of Newark
P. Robert Beatty, City of Berkeley
Alan Brown, City of Dublin
Betsy Cooley, City of Emeryville
George Young, City of Fremont
James N. Doggett, City of Livermore
Jan O. Washburn, City of Oakland
Robert Dickinson, City of Piedmont
Kathy Narum, City of Pleasanton
Ed Hernandez, City of San Leandro
Subru Bhat, City of Union City
County-at-Large, vacant

1. Call to order.
2. Roll call.
3. President Marquez 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 1063rd meeting held December 12th, 2018 (**Board action required**)
5. Election of Board Officers. Gavel transferred from President Marquez to the newly elected President. (**Board action required**)
6. Review of 2019 ACMAD Board Meeting and Event Calendar (**Possible board action required**)
7. Report from the Finance Committee: (Information only)
 - a. Review OPEB Actuarial Report
 - b. Review OPEB Fund Performance
 - c. Review OPEB investment policy & PFM Funding Policy Analysis
 - d. Review current PARS investment policy & investment options
 - e. Review Internal Controls
 - f. Review draft audit
8. Report on Invasive *Aedes* preparedness (Information only).
 - a. ACMAD 2017 Invasive *Aedes* Response Plan
 - b. Unconfirmed Invasive *Aedes* Flowchart
 - c. Confirmed Invasive *Aedes* Flowchart
 - d. Outstanding issues discussion

9. Review Committee Assignments for 2019 (Information only)
10. Financial Reports as of December 31st, 2018: (Information only).
 - a. Check Register
 - b. Income Statement
 - c. Investments, reserves, and cash report
11. Presentation of the Monthly Staff Report for January 2019 (Information only).
12. Presentation of the Manager's Report for January 2019 (Information only).
 - a. Trustee & Staff Anniversaries
 - b. Solar and remodel projects out to bid
 - c. Form 700 FFPP Conflict of Interest Report
 - d. ACSDA Annual Dinner March 28th, 2018. Redwood Canyon Golf Course, Castro Valley.
 - e. Training set to expire: AB1234-Washburn; AB1825-Dickinson, Doggett
 - f. Special District Leadership Academy Conference: July 7-10, Napa
 - g. Upcoming City Council Presentations: 1/10-Newark, 1/14-Livermore, 1/15-Pleasanton, 1/22-Union City, 1/29-Hayward, 2/5-Emeryville, 2/19-Alameda, 3/4-Piedmont, 3/5 Dublin, 3/12-Berkeley,).
 - h. SDLF District of Distinction
13. Board President asks for reports on conferences and seminars attended by Trustees.
14. Board President asks for announcements from members of the Board.
15. Board President asks trustees for items to be added to the agenda for the next Board meeting.
16. Adjournment.

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

Please Note: A copy of this agenda is also available at the District website, www.mosquitoes.org or via email by request. Alternative formats of this agenda can be made available for persons with disabilities. Please contact the district office at (510) 783-7744, via FAX (510) 783-3903 or email at acmad@mosquitoes.org to request an alternative format.

MINUTES

1063rd MEETING OF THE BOARD OF TRUSTEES OF THE ALAMEDA COUNTY MOSQUITO ABATEMENT DISTRICT

December 12th, 2018

TIME: 5:00 P.M.
PLACE: Office of the District, 23187 Connecticut Street, Hayward
TRUSTEES: Elisa Marquez, President, City of Hayward
Wendi Poulson, Vice-President, City of Alameda
Eric Hentschke, Secretary, City of Newark
P. Robert Beatty, City of Berkeley
Alan Brown, City of Dublin
Betsy Cooley, City of Emeryville
George Young, City of Fremont
James N. Doggett, City of Livermore
Jan O. Washburn, City of Oakland
Robert Dickinson, City of Piedmont
Kathy Narum, City of Pleasanton
Ed Hernandez, City of San Leandro
Subru Bhat, City of Union City
County-at-Large, Vacant

1. Board President Marquez called the regularly scheduled board meeting to order at 5:00 P.M.
2. All trustees were present. No trustees were absent.
3. Board President Marquez invited members of the public to speak on any issue relevant to the District. Mosquito Control Technician Jeremy Sette was present to record the minutes. Mike Oliver, President of the Municipal Resource Group, LLC was present to report on item #5. Field Operations Supervisor Joseph Huston and Vector Biologist Miguel Cardenas were also present.
4. Approval of minutes of the 1062th meeting held November 14th, 2018.
Motion: Trustee Beatty moved to approve the minutes
Second: Trustee Narum
Vote: motion carries: unanimous.
5. Proposal from the Municipal Resource Group, LLC to conduct a Capital Asset Replacement Program Analysis
Discussion:
Mike Oliver discussed his proposal for a Capital Asset Replacement Program Analysis for the District and fielded the following questions. Trustee Beatty asked if the analysis covering 20 years' time would be looked at again within that time (the report could be updated periodically, if needed). Trustee Dickinson asked about the effect of this report on the District's accounting (public sector's motivations for depreciation and capital planning differ from the private sector as there is no tax savings benefit, only prudent financial planning stabilities) and if the firm

would evaluate equipment investments that will increase the District's efficiency (not directly but will work with staff on identifying and evaluating all assets over \$5,000 and could compare this list to other mosquito district's asset lists). President Marquez asked if the analysis will cover District vehicles (yes).

Motion: Trustee Narum moved to approve the proposal from the Municipal Resource Group, LLC to conduct a Capital Asset Replacement

Second: Trustee Doggett

Vote: motion carries: unanimous.

6. The Nominating Committee nominated a slate of 2018 District Officers for Board Approval

Discussion:

Trustee Beatty, on behalf of the Nominating Committee, presented the slate of 2018 District Officers. Trustees Hentschke, Poulson and Beatty were nominated for President, Vice-President and Secretary, respectively.

Motion: Trustee Hernandez moved to approve the nominations of Trustees Hentschke, Poulson and Beatty for President, Vice-President and Secretary, respectively.

Second: Trustee Cooley

Vote: motion carries: unanimous.

7. Appointment of members to the Personnel/Salary Committee

Discussion:

The General Manager provided an explanation and purpose of the Personnel/Salary Committee, and then asked for volunteers after fielding the following questions. President Marquez asked if the Board would make this decision during this agenda item (preferably). Trustee Hentschke asked who was on the previous Committee (former Trustees Guarienti and Paulsen, as well as current Trustees Doggett and Poulson). Trustees Narum, Marquez, Brown and Hentschke expressed interest in joining the Personnel/Salary Committee.

Motion: Trustee Beatty moved to approve the appointment of Trustees Narum, Marquez, Brown and Hentschke to the Personnel/Salary Committee

Second: Trustee Washburn

Vote: motion carries: unanimous.

8. Report on the 2018 Annual Meeting of the Entomological Society of America and the Entomological Society of Canada by Trustee Dr. Jan O. Washburn.

Discussion:

Trustee Washburn gave a report on his attendance to the 2018 Annual Meeting of the Entomological Society of America and the Entomological Society of Canada and fielded the following questions. Trustee Beatty asked of how many people attending the conference were from mosquito abatement districts (out of around 3,500 attendees, there were around 600 from mosquito abatement districts).

9. Discussion on Board Packet paper-reduction possible strategies

Discussion:

The General Manager opened up a discussion relating to possible strategies for paper-reduction, specifically relating to Board Agenda packets. Trustee Washburn expressed his preference for paperless, stating he could use his laptop. Trustees Young and Cooley each expressed their preference for paper packets. President Marquez suggested if any Board member would like to opt-out of paper packets, email the General Manager.

10. Schedule a Finance Committee meeting to discuss the OPEB investment policy and the pension rate stabilization fund investment policy.

Discussion:

The General Manager opened up a discussion to schedule a Finance Committee meeting to discuss the OPEB investment policy, the pension rate stabilization fund investment policy, review of the District credit card, and review of internal controls while fielding the following questions. Trustee Cooley requested more information regarding the reported check fraud (Bank of the West bank reported an attempt of check fraud that was handled by the Accounting Associate) The General Manager asked when the Board would like to meet. Trustees Cooley and Narum both suggested before the next Board Meeting. Trustee Young asked if the District credit card had a points program (yes). Trustee Dickinson asked if PFM and PARS must be at the meeting (it is recommended that they attend and provide recommendations). President Marquez asked when a good time for the Finance Committee to meet and the Finance Committee agreed to meet at 3:30 PM on January 9th,2019.

11. Financial Reports as of November 30th, 2018.

Discussion:

The General Manager presented the financial reports as of November 30th, 2018 and fielded the following questions. Trustee Poulson asked who Sacramento Koi was (Mosquitofish vendor).

12. Presentation of the Monthly Staff Report for December 2018.

Discussion:

The General Manager presented the Monthly Staff Report for December 2018 and fielded the following questions. President Marquez suggested sending out a follow up email after service requests were completed promoting our social media outreach which was agreed by Trustee Narum. The General Manager added that the District already has a follow-up survey process in place after service requests but will add this suggestion to the form.

13. Presentation of the Manager's Report for December 2018.

Discussion:

The General Manager presented the Manager's Report for December 2018 and fielded the following questions. The General Manager presented the pewter belt buckle to Trustee Narum for 5 years of service to the Board, congratulated Trustee Cooley for her two years of Board service and acknowledged Vector Biologist Neil Campbell's recent mark of fifteen years of service to the District. The General Manager asked Field Operations Supervisor Joseph Huston if he had more input on the Monthly Staff Report (Huston noted that operations staff were shifting focus on different species and sources as the season changed into winter). The General Manager encouraged the Board to suggest any contractors for the prospective District remodel. Trustee Narum noted that competition and costs are high after the recent fires. Trustee Poulson asked if the District needs electricians and plumbers (yes, but under a General Contractor's purview). Trustee Washburn asked if there was a city council presentation date scheduled for Oakland yet (not yet).

14. Board President Marquez asked for reports on conferences and seminars attended by Trustees. Besides Trustee Washburn's earlier report, the General Manager reported on attending an invasive *Aedes* forum in southern California with the District's Lab Director on December 11th. Trustee Narum asked the General Manager if the budget increase for Los Angeles Vector Control would be specifically focused on hiring new technicians (yes). Trustee Washburn brought up possible challenges if *Aedes* come to Alameda County.

15. Board President Marquez asked for announcements from the Board. None.

16. Board President Marquez asked trustees for items to be added to the agenda for the next Board meeting. Trustee Narum asked Trustee Washburn if the pilot program he reported on could be replicated here (Alameda County does not have the mosquitoes yet, but another study

could be undertaken such as handing out fliers with a survey asking if homeowners would be willing to participate in Aedes trapping). Trustee Narum suggested adding an agenda item addressing the District's plan for invasive *Aedes* response. Mr. Huston added that as part of our service requests, the District already asks residents if they would like to participate in our *Aedes* surveillance by allowing the District to place traps on their property. Trustee Washburn added that he will work on organizing comprehensive data for the report. President Marquez asked if this topic could be added to a future agenda (the General Manager answered that a report on the District's plan for invasive Aedes will be forthcoming). Trustee Hernandez suggested also adding a report on the types of trap technology that exists such those that automatically count mosquitoes.

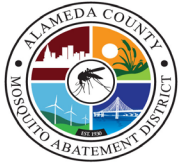
17. The meeting adjourned at 6:14 P.M.

Respectfully submitted,

Approved as written and/or corrected
at the 1064th meeting of the Board of
Trustees held January 9th, 2019

Elisa Marquez, President
BOARD OF TRUSTEES

Eric Hentschke, Secretary
BOARD OF TRUSTEES



ACMAD Calendar 2019

January

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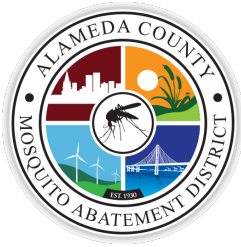
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- Board Meetings
- Holidays
- Conferences: (MVCAC Annual: 2/3-2/5; AMCA Annual: 2/25-3/2; MVCAC Leg Day: 4/1-4/2; CSDA Leg: 5/20-5/22; CSDA GM Summit: 6/23-6/27; CSDA Annual: 9/25-9/28)



Board of Trustees

President

Richard Guarienti

Dublin

Vice-President

Kathy Narum

Pleasanton

Secretary

Robert Dickinson

Piedmont

Humberto Izquierdo

County at Large

Wendi Poulson

Alameda

P. Robert Beatty

Berkeley

Scott Donahue

Emeryville

George Young

Fremont

Elisa Marquez

Hayward

James N. Doggett

Livermore

Eric Hentschke

Newark

Jan O. Washburn

Oakland

Ursula Reed

San Leandro

Ronald E. Quinn

Union City

Ryan Clausnitzer

District Manager

Invasive *Aedes* Mosquito Response Plan

September 2017

1. Overview

The purpose of this document is to guide the Alameda County Mosquito Abatement District (ACMAD) in responding to invasive container breeding mosquitoes, *Aedes aegypti* (yellow fever mosquito) and *Aedes albopictus* (tiger mosquito), that have the potential to breed and become established in Alameda County (County). These two species of mosquito are known to transmit arboviruses that cause dengue, chikungunya, yellow fever, and Zika in people. Plans are needed to survey the County for invasive *Aedes*, confirm the identification of a mosquito specimen as an invasive *Aedes*, and act to limit the dispersal of invasive *Aedes* in the County. Because the breeding, dispersion, and control of invasive *Aedes* mosquitoes differ substantially from that of mosquito species which transmit West Nile virus, a distinct response plan is needed for invasive *Aedes*. The City of Albany is excluded from this response plan because mosquito control for the city is provided by Alameda County Vector Control Services District. The ACMAD Invasive *Aedes* Mosquito Response Plan that is outlined herein was developed using the California Department of Public Health (CDPH) "Guidance for Surveillance of and Response to Invasive *Aedes* Mosquitoes and Locally Acquired Exotic Mosquito-borne Infections Transmitted by These Mosquitoes in California" published in June 2014 and revised February 2017, response plans published by other vector control entities, and knowledge of the environmental factors that drive mosquito abundance in Alameda County. This plan supplements the mosquito control and surveillance activities that are described in the ACMAD Mosquito-Borne Arbovirus Response Plan.

2. Annual Training

Training will focus upon invasive mosquito species currently present in California. Upon completion of training, Operations and Lab Staff should be able to:

- Identify all life stages of invasive mosquito species.
- Have knowledge of the biology and ecology of invasive mosquito species and of the arboviruses they transmit.
- Be current on latest surveillance and control methods used for invasive mosquitoes in California.

3. Pre-Detection of Invasive *Aedes* Mosquito Response Plan

- A. ***Aedes* Surveillance.** Oviposition traps are placed throughout Alameda County, with a focus on sites where invasive *Aedes* mosquitoes are more likely to be introduced or have habitats that are more supportive of *Aedes* mosquito breeding (e.g. cemeteries, nurseries, US Customs inspection sites).
- B. **Service Requests.** If a service request indicates daytime biting mosquitoes, and a native *Aedes* mosquito sample is not provided, Operations Staff will inspect the site for all life stages of invasive *Aedes* mosquitoes.
- C. **Human Case Surveillance.** When local public health agencies notify ACMAD of a suspected case of invasive mosquito-vectored disease, Lab Staff may place mosquito traps near to where the individual resided while they were potentially viremic.
- D. **Public Outreach.** The goal is to educate the community on the differences between invasive *Aedes* and mosquitoes that are native to Alameda County. The focus is on prevention and detection by encouraging residents to reduce potential invasive *Aedes* breeding sources, and to report daytime biting mosquitoes to ACMAD.

4. Plan for Confirmation of an Invasive *Aedes* Mosquito in the County

- A. **Mosquito Specimen Documentation.** ACMAD Staff that collect mosquito specimens suspected to be invasive *Aedes* will document the location at which the specimen was collected (address or GPS coordinates are required), the date and time of collection, and the name of the Staff that collected the specimen.
- B. **Mosquito Sample Transport.** All suspected invasive *Aedes* specimens will be transported to the ACMAD Lab for identification. Suspected adult invasive mosquitoes that are collected by Staff should be immediately killed without damaging the specimen, and subsequently placed into a container for transport to the ACMAD Lab for identification. Larval specimens should be collected in a specimen container using the water in which the larvae were found, and efforts made to keep the specimens alive. Suspected invasive *Aedes* eggs should be collected in a manner that does not damage or desiccate the eggs, preferably by placing the container that contains the eggs into a moistened plastic bag for transport.
- C. **Identification of Suspected Invasive *Aedes*.** ACMAD Staff will identify the specimen using taxonomic keys and verified photographs of invasive *Aedes* and local mosquito species. If the specimen keys to an invasive *Aedes*, two additional ACMAD Staff members having extensive expertise in identifying mosquitoes will independently confirm the identification (e.g. Laboratory Director, Biological Specialist, or Operations Supervisor).
- D. **External Confirmation of Invasive *Aedes*.** If ACMAD Staff members concur that the specimen is likely invasive *Aedes*, external experts will be consulted for confirmation. All specimens will be photographed before being transported for external confirmation. Eggs will be sent to the UC Davis Arbovirus Research and Training (DART) facility for identification. Larvae should be reared to adult in a contained insectary and identified to species. For adults, the Supervising

Public Health Biologist and Senior Public Health Biologist for Alameda County at CDPH will be advised of the identification. The specimens may be preserved for genotype analysis.

5. Post-Detection of Confirmed Invasive *Aedes* Mosquito Response Plan

- A. **Confirmed Invasive *Aedes*.** If CDPH or DART confirms the identification of a specimen as an invasive *Aedes*, the Public Health Emergency Committee of the ACMAD Board of Trustees, nearby Mosquito Abatement and Vector Control agencies, and the Emergency Operations Center (EOC) for each affected and nearby city will be notified. A press release will be distributed to the ACMAD Board of Trustees, the media, and local agencies to inform the public of the detection.
- B. **Operations Control Response.** The broad goal of the Operations Response is to limit the intensity and geographic distribution of invasive *Aedes*. All equipment that leave an area with invasive *Aedes* should first be inspected and sanitized (interior and exterior of the vehicle). Collected mosquito specimens will be placed within sealed containers before leaving the infested area to prevent the spread of mosquitoes. Residents where inspections are made should be provided with a Post Inspection Form, outreach materials, and be available to answer questions.
- i. **Catch Basin Treatment.** Catch basins in and around the area having invasive *Aedes* will be treated to reduce the abundance of all mosquitoes in the area.
 - ii. **Outside of the Invasive *Aedes* Response Area.** Vector Biologists and Mosquito Control Technicians will treat mosquito breeding sources and respond to service requests by County residents, although potentially at reduced intervals to permit increased staffing in the invasive *Aedes* Response Area.
 - iii. **Inspection and Treatment Inside the Invasive *Aedes* Response Area.** Operations Staff should work as groups that include a Vector Biologist or Mosquito Control Technician. Each group forms a field invasive *Aedes* response team, which will inspect and sanitize properties within the invasive *Aedes* Response Area, and educate residents on how to eliminate potential breeding sources. Treatments to suppress adult invasive *Aedes* mosquitoes may be made at properties after they have been sanitized to prevent mosquito breeding. Non-*Aedes* breeding sources will be treated within the invasive *Aedes* Response Area to reduce overall mosquito abundance. Home Invasive *Aedes* Surveillance Kits may be provided to residents within the invasive *Aedes* Response Areas. Instructions included with the Home Invasive *Aedes* Surveillance Kits will provide guidance for effective trap placement and the return of specimens to the ACMAD Lab for identification. Teams will encourage the voluntary removal of containers that may contain invasive *Aedes*, and return these to the ACMAD Lab for identification and external confirmation, if needed. Once containers are no longer needed for identification (preferably within a day of collection), they will be sanitized, damaged to prevent water accumulation and disposed of at a site that buries the waste underground. If the field invasive *Aedes* response teams are unable to gain permission to enter a property for inspection or treatment, a twenty-four hour notice to enter the property will be affixed to the entry door(s) on the property.
 - iv. **Treatment in Response to Travel-Related Patient-Case.** Operations or Lab Staff will work in groups to inspect properties around where the case-patient resided in the two weeks before the onset of illness and while viremic (at least a 150 m radius around the residence(s)), and other locations where exposure to invasive *Aedes* mosquitoes may have occurred (e.g. neighborhood and workplace). Patients should be advised to take all steps to avoid mosquito bites to minimize the risk of local transmission. If invasive

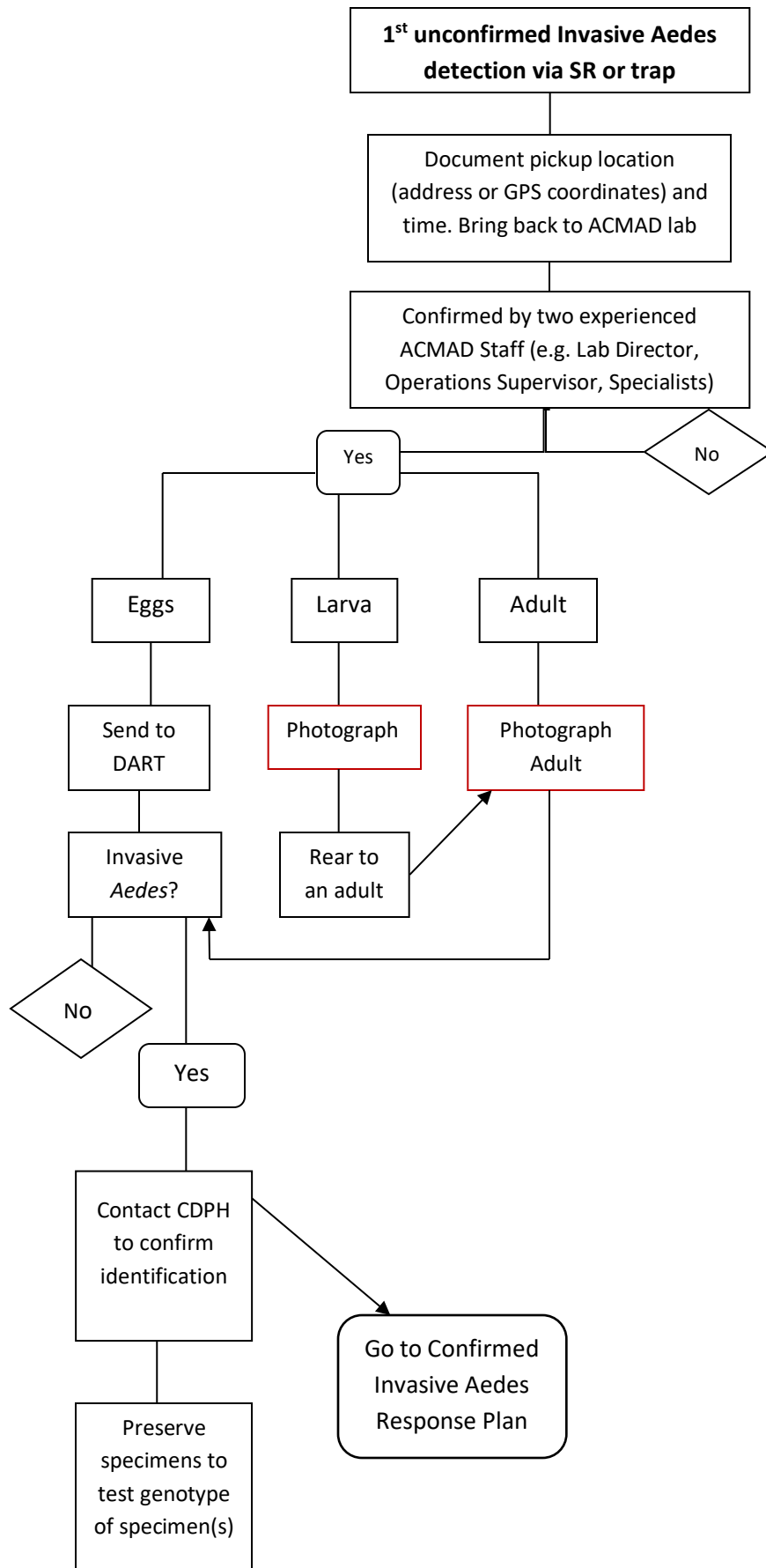
Aedes are observed within the inspection areas, efforts should be made by Operations Staff to eliminate all life stages of the mosquitoes from all properties in that area (*i.e.* eggs, larvae and adults). Particular attention should be made to identifying and treating cryptic breeding and adult resting sites. Residents within the inspection areas will be strongly encouraged to eliminate potential breeding sites and may be provided autocidal mosquito traps to reduce mosquito abundance. ACMAD Staff are prohibited from disclosing any personal information related to the case. This includes but is not limited to the address where the case-patient resides, the size of the area being inspected, the name of case, their travel history, or suspected disease.

- v. **Treatment in Response to Locally Acquired Human Transmission.** ACMAD will coordinate response and public notification activities with CDPH, Alameda County Public Health Department, and the governance of affected cities. The EOC of the affected and nearby cities will be notified of Operations activities. In addition to processes described for Treatment in Response to Travel-Related Patient-Case (section 5.B.iv), ACMAD will continue monitoring the identified areas of concern for 45 days (three virus replication cycles in mosquitoes), and enact additional control measures if indicated. Female mosquitoes that are collected in traps will be sent to DART for arbovirus testing.
- C. **Laboratory Surveillance Response.** The broad goal of the Lab Response is to quantify the intensity and geographic distribution of invasive *Aedes* so that Operations can focus control efforts where they are most needed. Lab Staff will also continue surveillance of non-*Aedes* mosquito abundance and West Nile virus in the County. As with Operations, all equipment that leave invasive *Aedes* Response Areas should first be inspected and sanitized, and collected mosquito specimens contained before leaving that area to prevent the spread of mosquitoes.
- i. **Surveillance Overview.** Lab Staff will conduct surveillance for invasive *Aedes* mosquitoes by forming invasive *Aedes* surveillance teams, each of which should be led by the Laboratory Director or Biological Specialist. Invasive *Aedes* surveillance teams may also inspect and sanitize properties, and treat sources of breeding mosquitoes. They will employ a range of specialized invasive *Aedes* traps and standard mosquito traps to quantify mosquito abundance, the relative proportion of invasive to native mosquitoes, and geographic distribution of mosquitoes within and around the invasive *Aedes* Response Area. Lab Staff will generate mosquito abundance maps for each invasive *Aedes* Response Area that document the location and abundance of invasive *Aedes* and native mosquitoes. Adult invasive *Aedes* mosquitoes that are collected should be sent to DART for arbovirus testing.
 - ii. **Surveillance in a Newly-Identified Invasive *Aedes* Response Area.** Mosquito specimens that are collected from sites outside of a current invasive *Aedes* Response Area and are likely to be invasive *Aedes*, will be identified to species by the ACMAD Lab and confirmed using external experts.
 - iii. **Surveillance in an Ongoing Invasive *Aedes* Response Area.** Mosquito specimens that are collected within a current invasive *Aedes* Response Area, and are likely to be invasive *Aedes*, should be identified to species by ACMAD Lab Staff. Surveillance in an invasive *Aedes* detection area should be conducted for at least two years after the last detection. If multiple and sustained detections are made in an area, long-term invasive *Aedes* monitoring sites should be established for that area.
 - iv. **Surveillance for a Human Case of an Arbovirus Transmitted by Invasive *Aedes*.** ACMAD will activate the Laboratory Surveillance Response (Section C). Additionally, all *Culex* and *Aedes* mosquitoes that are collected in traps will be sent to DART for arbovirus testing. If invasive *Aedes* are detected near a person that is infected with an arbovirus,

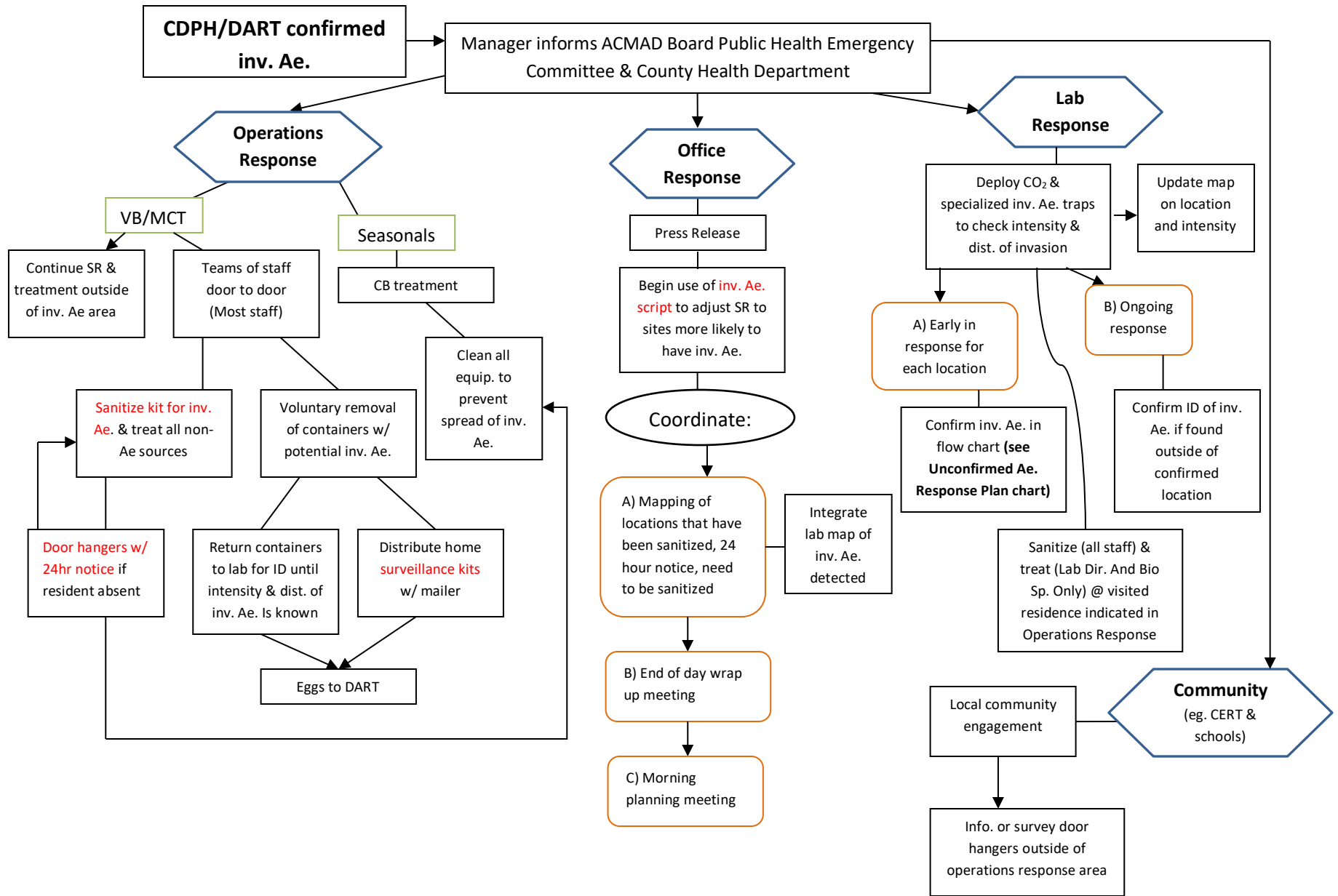
ACMAD will activate the Treatment in Response to Travel-Related Patient-Case or Treatment in Response to Locally Acquired Human Transmission (Sections 5. B. vi. and 5. B. v.).

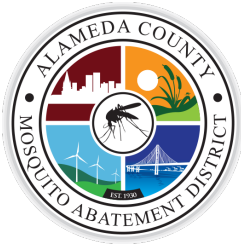
- D. **Office Response.** The goal of the Office Response is to inform County residents and relevant entities of the invasive *Aedes* Response Area, coordinate the Operations and Lab Responses, and engage in public outreach to encourage County-wide efforts to suppress the breeding and dispersion of invasive *Aedes* mosquitoes.
- i. **Service Request Script for Invasive *Aedes*.** For service request calls, the Office Staff will employ a script and reporting form that is designed to identify calls with a higher likelihood of being initiated by invasive *Aedes*.
 - ii. **Coordination of Operations and Lab Responses.** Inspection maps will be generated by Office Staff for guiding Operations Staff to sites in and around the invasive *Aedes* Response Area that have been sanitized, need inspection, or have twenty-four hour entry notices placed at the property. Office Staff will integrate inspection and mosquito abundance maps for coordinating Operations and Lab Staff efforts. The Office Staff will coordinate the meetings of the ACMAD Staff.
 - iii. **Public Outreach Response.** The goal of the Public Outreach Response is to increase the awareness of invasive *Aedes* in the community to encourage residents to report daytime biting mosquitoes to ACMAD, and inspect and sanitize properties in the County so that the spread of invasive *Aedes* can be curtailed. Outreach to the elected representatives, government agencies, and community officials in the affected areas are also included in this response.
 - iv. **Community Engagement.** Community groups (e.g. Community Emergency Response Teams (CERT), Home Owners Associations (HOAs), and volunteer groups) within and adjacent to the Response Area may be activated to aid ACMAD Staff in distributing information related to the invasive *Aedes* response. The public should be reassured that the risks of arbovirus transmission is low if no locally acquired human infections have been confirmed.

Unconfirmed Invasive *Aedes* Response Plan



Confirmed Invasive *Aedes* Response Plan





23187 Connecticut Street
Hayward, CA 94545

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

acmad@mosquitoes.org

Committee Assignments for 2019

Board of Trustees

President

Elisa Marquez

Hayward

Vice-President

Wendi Poulson

Alameda

Secretary

Eric Hentschke

Newark

Humberto Izquierdo

County at Large

P. Robert Beatty

Berkeley

Betsy Cooley

Emeryville

Alan Brown

Dublin

George Young

Fremont

James N. Doggett

Livermore

Jan O. Washburn

Oakland

Robert Dickinson

Piedmont

Kathy Narum

Pleasanton

Ed Hernandez

San Leandro

Subru Bhat

Union City

Ryan Clausnitzer

General Manager

Financial 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.

Membership: Bhat, Cooley, Dickinson, Hernandez, Narum, Young

Policy Committee

Purpose: The Policy Committee evaluates the District's Policies and updates and adds policies as needed. All District policies must be approved by a majority of the Board.

Membership: Bhat, Doggett, Hernandez, Marquez

Ad-Hoc Manager Evaluation Committee

Purpose: The primary task of this committee is to review the performance of the District Manager, annually by the June board meeting. Compensation changes and contract adjustments will be based on this evaluation.

Membership: Past, present, and future Board Presidents: Marquez, Hentschke, Poulson

Ad-Hoc Public Health Emergency Committee

Purpose: To meet with Staff to review District surveillance and treatment information pertaining to current or emerging public health threats and make recommendations to the board if necessary.

Membership: Washburn, Doggett, Poulson

Status: This committee only meets on an as needed basis.

Ad-Hoc Personnel/ Salary Committee

Purpose: To meet as needed if personnel issues rise to the level of an appeal to the board and to negotiate MOU with employee association.

Membership: Hentschke, Brown, Marquez, Narum

Status: This committee only meets on an as needed basis and at scheduled negotiating times.

Ad-Hoc Sustainability Committee

Purpose: To evaluate areas the District can improve its sustainability such as solar energy, refuse reduction, and fuel efficiency.

Membership: Marquez, Poulson, Washburn

Status: This committee only meets on an as needed basis.

Alameda County Mosquito Abatement Dist.
Check Register
For the Period From Dec 1, 2018 to Dec 15, 2018

Filter Criteria includes: Report order is by Date.

Check #	Date	Payee	Amount
1334	12/13/18	Payroll	68,343.35
1335	12/15/18	All-Ways Green Services	820.00
1338	12/15/18	Argo Adventure	135.60
1339	12/12/18	Airgas	58.02
1340	12/15/18	Tom Branan	139.00
1341	12/15/18	Cintas	450.64
1342	12/15/18	CSDA	894.70
1343	12/15/18	California Chamber of Commerce	111.70
1344	12/15/18	California School Boards Association	1,875.00
1345	12/15/18	CalPERS 457	3,220.00
1346	12/15/18	Grainger	39.95
1347	12/15/18	Industrial Park Landscape Maintenance	215.00
1348	12/15/18	MAZE & ASSOCIATES	5,225.00
1349	12/15/18	Naylor Steel, Inc.	80.64
1350	12/15/18	PFM Asset Management	1,711.94
1351	12/15/18	PG&E	272.91
1352	12/15/18	Regional Government	2,480.89
1353	12/15/18	The Hartford	77.78
1354	12/15/18	Voya Institutional Trust Company	150.00
1355	12/15/18	Jan Washburn	1,313.80
1356	12/15/18	Waste Management of Alameda County	248.94
1357	12/12/18	U.S Bank Corporate Payment System	12,077.11
ACH	12/15/18	CalPERS Retirement	11,931.56

Voided checks

1336V

1337V

Total Expenditures 12/15/18 111,873.53

Alameda County Mosquito Abatement Dist.
Check Register
 For the Period From Dec 16, 2018 to Dec 31, 2018

Filter Criteria includes: Report order is by Date.

Check #	Date	Payee	Amount
1358	12/20/18	Payroll	68,060.22
1359	12/28/18	P. Robert Beatty	100.00
1360	12/28/18	Subrahmanya Y Bhat	100.00
1361	12/28/18	Alan Brown	100.00
1362	12/28/18	Elizabeth Cooley	100.00
1363	12/28/18	James N Doggett	100.00
1364	12/28/18	Robert Dickinson	100.00
1365	12/28/18	Eric Armin Hentschke	100.00
1366	12/28/18	Edward Hernandez	100.00
1367	12/28/18	Elisa Marquez	100.00
1368	12/28/18	Katherine Narum	100.00
1369	12/28/18	Wendi Lynn Poulson	100.00
1370	12/28/18	Jan Washburn	100.00
1371	12/28/18	George Young	100.00
1372	12/28/18	CalPERS 457	3,220.00
1373	12/28/18	Cintas	401.62
1374	12/28/18	PG&E	1,704.23
1375	12/28/18	Voya Institutional Trust Company	150.00
1376	12/28/18	VCJPA	217.92
1377	12/28/18	Verizon	1,418.75
1378	12/28/18	WEX Bank	2,403.82
ACH	12/28/18	CalPERS Health	32,114.10
ACH	12/28/18	CalPERS Retirement	11,958.92
Total Expenditures 12/31/18			122,949.58

Alameda County Mosquito Abatement District
Income Statement
Consolidated
December 31, 2018. (6 of 12 mth, 50%)

REVENUES	Actual 2015/16 ¹	Actual 2016/17 ¹	Current Month	Year to Date 2018/2019	Budget 2018/2019	Actual vs Budget
Total Revenue	\$ 4,180,831.00	\$ 4,366,903.00	\$ 2,153,907.03	\$ 2,153,907.03	\$ 4,476,728.00	48%

EXPENDITURES	Actual 2015/16	Actual 2016/17	Current Month ²	Year to Date 2018/2019	Budget 2018/19	Actual vs Budget
Salaries	\$1,661,234	\$1,677,469	\$ 151,371.69	\$ 944,144.53	\$1,933,182	49%
CalPERS Retirement	\$205,340	\$219,892	\$ 13,636.72	\$ 228,436.38	\$301,812	76%
Medicare	\$21,160	\$21,368	\$ 2,025.64	\$ 12,684.81	\$28,031	45%
Fringe Benefits	\$554,630	\$453,877	\$ 32,330.88	\$ 227,763.38	\$508,680	45%
Total Salaries, Retirement, & Benefits	\$2,442,364	\$2,372,606	\$199,365	\$1,413,029	\$2,771,705	51%
Clothing and personal supplies (purchased)	\$7,169	\$8,955	\$ -	\$ 2,952.36	\$6,000	49%
Laundry service and supplies (rented)	\$7,162	\$8,840	\$ 852.26	\$ 5,829.67	\$9,500	61%
Utilities	\$22,214	\$27,084	\$ 2,226.08	\$ 12,283.66	\$36,500	34%
Communications-IT	\$32,756	\$54,128	\$ 3,353.81	\$ 42,400.73	\$122,200	35%
Maintenance: structures & improvements	\$6,739	\$19,503	\$ 442.60	\$ 4,728.91	\$25,000	19%
Maintenance of equipment	\$24,175	\$27,051	\$ 406.53	\$ 7,725.20	\$35,000	22%
Transportation, travel, training, & board	\$75,326	\$124,827	\$ 10,341.64	\$ 45,214.67	\$134,210	34%
Professional services	\$159,499	\$82,082	\$ 11,706.69	\$ 52,650.92	\$190,620	28%
Memberships, dues, & subscriptions	\$14,540	\$20,191	\$ -	\$ 20,698.00	\$21,402	97%
Insurance - (VCJPA, UAS)	\$106,268	\$113,867	\$ 217.92	\$ 124,921.84	\$127,851	98%
Community education	\$12,450	\$40,222	\$ 202.31	\$ 12,944.28	\$33,000	39%
Operations	\$187,490	\$176,758	\$ 1,076.26	\$ 57,787.26	\$234,000	25%
Household expenses	\$13,790	\$17,373	\$ 820.00	\$ 12,592.35	\$19,350	65%
Office expenses	\$14,195	\$18,590	\$ 305.45	\$ 5,361.84	\$15,100	36%
Laboratory supplies	\$76,130	\$80,008	\$ 2,974.73	\$ 29,858.82	\$118,148	25%
Small tools and instruments	\$1,155	\$2,513	\$ -	\$ 2,021.44	\$2,500	81%
Total Staff Budget	\$ 780,944.00	\$833,192	\$ 34,926.28	\$ 439,971.95	\$1,130,381	39%
Total Operating Expenditures	\$ 3,032,263.00	\$3,479,710	\$ 234,291.21	\$ 1,853,001.05	\$3,902,086	47%

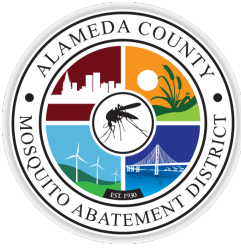
1 - Subcategories in Fiscal years 2015/16 and 2016/17 do not add up due to accruals not being posted

2 - Total Operating Expenditures in current month do not match the check register due to Accounts receivable

**Alameda County Mosquito Abatement District
Investment, Reserves, and Cash Balance Report
December 31, 2018. (6 of 12 mth, 50%)**

Account #	Investment Accounts	Beginning Balance	Deposits	Withdrawals	Interest Activity	New Balance
800005	LAIF	\$ 444,013.19	\$ -	\$ (200,000.00)		\$ 244,013.19
800006	OPEB Fund	\$ 4,068,861.48			\$ (167,062.17)	\$ 3,901,799.31
101106	VCJPA Member Contingency	\$ 338,010.00	\$ -			\$ 338,010.00
101106.1	VCJPA Property Contingency	\$ 50,263.00	\$ -			\$ 50,263.00
800007.1	CAMP: Repair and Replace ¹	\$ 621,145.38	\$ -	\$ (33,233.33)	\$ 1,258.62	\$ 589,170.67
800007.2	CAMP: Public Health Emergency	\$ 509,170.88	\$ -		\$ 1,065.47	\$ 510,236.35
800007.3	CAMP: Operating Reserve	\$ 1,881,332.97	\$ -		\$ 3,936.80	\$ 1,885,269.77
800007.4	CAMP: Capital Reserve Fund ²	\$ 252,066.09	\$ -	\$ (1,920.00)	\$ 525.08	\$ 250,671.17
800008	PARS: Pension Stabilization ³	\$ 987,585.13	\$ -		\$ 7,179.03	\$ 994,764.16
Total		\$ 9,152,448.12	\$ -	\$ (235,153.33)	\$ (153,097.17)	\$ 8,764,197.62
		Beginning			Activity	New Balance
Cash Accounts		Balance				
101110	Bank of America (Payroll Account)	\$ 119,117.51				\$ 55,407.82
101111	Bank of The West (Transfer Account)	\$ 302,769.39				\$ 332,643.93
100001	County Account	\$ 448,976.39			\$ 2,153,907.03	\$ 2,602,883.42
Total		\$ 870,863.29			\$ 2,153,907.03	\$ 2,990,935.17

- 1 - \$33,233.33 transferred from CAMP - Repair and Replace to cover the down payment for the roof project
2 - \$1,920.00 transferred from CAMP - Capital Reserve Fund to cover 30% of the Solar project consultant services
3- PARS - Pension Stabilization balance is as of November 30, 2018.



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MONTHLY STAFF REPORT – January 2019

Board of Trustees

President

Elisa Marquez

Hayward

Vice-President

Wendi Poulson

Alameda

Secretary

Eric Hentschke

Newark

Humberto Izquierdo

County at Large

P. Robert Beatty

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Union City

Ryan Clausnitzer

General Manager

1. OPERATIONS REPORT

Rainfall totals for the month of December were below the expected average. The rain that did fall, coupled with lingering ponded areas from heavy rains in late November, began producing larvae of all four of ACMAD's winter mosquito species; *Aedes squamiger*, *Aedes washinoi*, *Aedes sierrensis*, and *Culiseta inornata*. Breeding in smaller, confined sources provides operations with the opportunity to treat larvae before more rainfall occurs. More rain will make most sources larger and there will be a wider larval distribution in the source. As more rainfall occurs, water levels will rise, inundate, and hatch out more *Aedes* eggs laid in previous years. These sources will require more inspections and treatments as more rain occurs, however, the overall larval numbers in these environments will be lower.

Many of the treatments in December were for *Culiseta inornata*. Adults of this species over-summer in sheltered areas and come out as cooler weather and rain set in. *Cs. inornata* lay eggs continually during the rainy season so operations can significantly reduce the numbers of new adults by treating larvae in smaller, concentrated sources. In normal rain years with many hundreds of acres breeding *Ae. squamiger* (the main species responsible for the formation of our district in 1930) and *Ae. Washinoi*, it can be challenging to treat all the sources breeding *Cs. inornata* before at least some new adults emerge. Many sources that produce *Ae. squamiger* or *Ae. washinoi* also produce *Cs. inornata* and both species can be treated simultaneously, but there are also many sources that will produce *Cs. inornata* exclusively. With smaller amounts of water standing in all these sources, operations have the luxury of being able to inspect and treat all pertinent sources for these species and limiting larval numbers throughout the county.

Our fourth winter species, *Aedes sierrensis*, breeds in different habitats from the other three--in tree holes and containers filled with leaves. These sources will typically only hold a given amount of water. This coupled with a very standard pattern of adult emergence sometime in later March allows treatments to be postponed until February or early March, if needed, so focus can be maintained on the other three winter species.

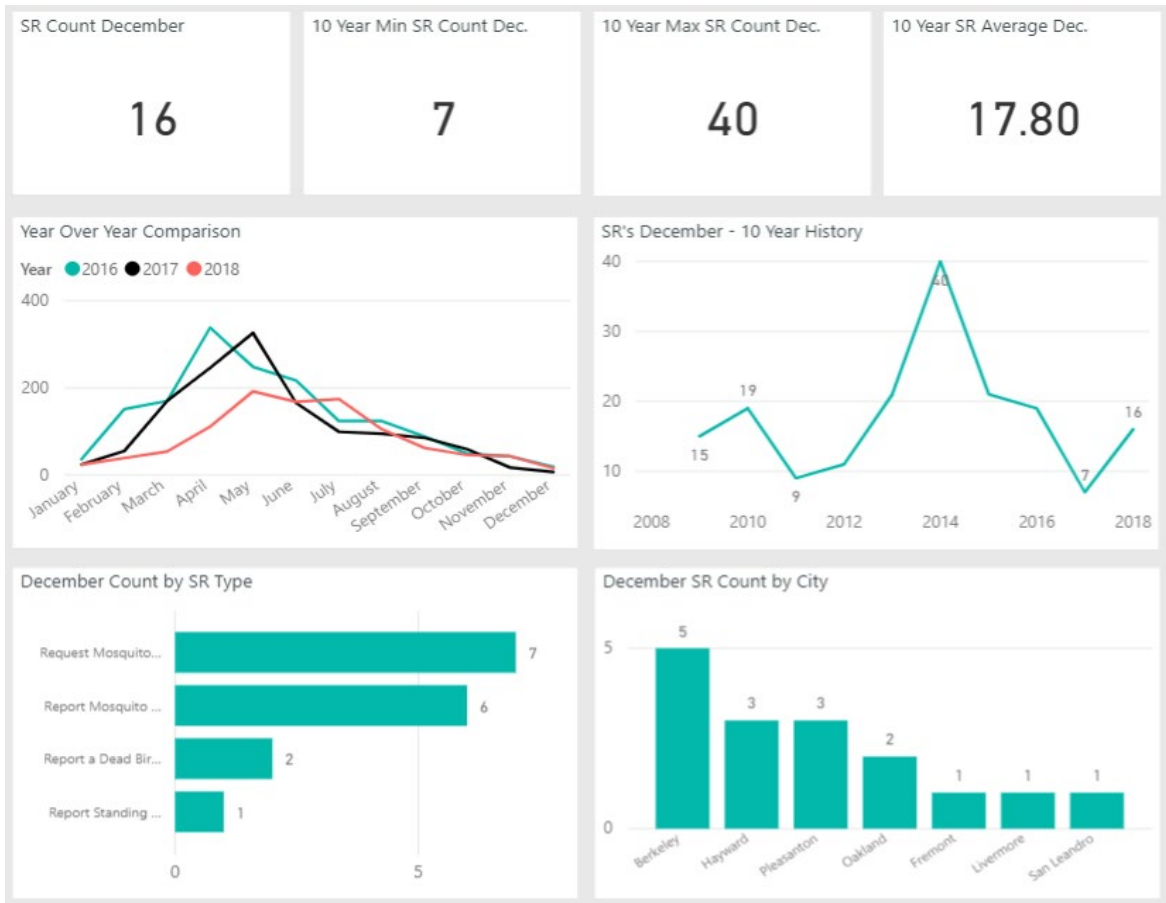
Ditching efforts continued throughout the month of December in permitted marsh sources. These efforts will continue until the expiration of this season's permit at the end of January. Operations continued to make great progress on ditches that have not been cleared in many years. Operations will be monitoring these areas closely in months to come to see what impact the work has on future breeding, inspections, and treatments.

Service requests for the month of December were around average for the month. It is expected that service request numbers will remain lower to average for the months of January and February. This is the norm for these months, and it helps operations to continue focus on inspecting and treating for our winter species and to continue ditching efforts on a consistent basis.

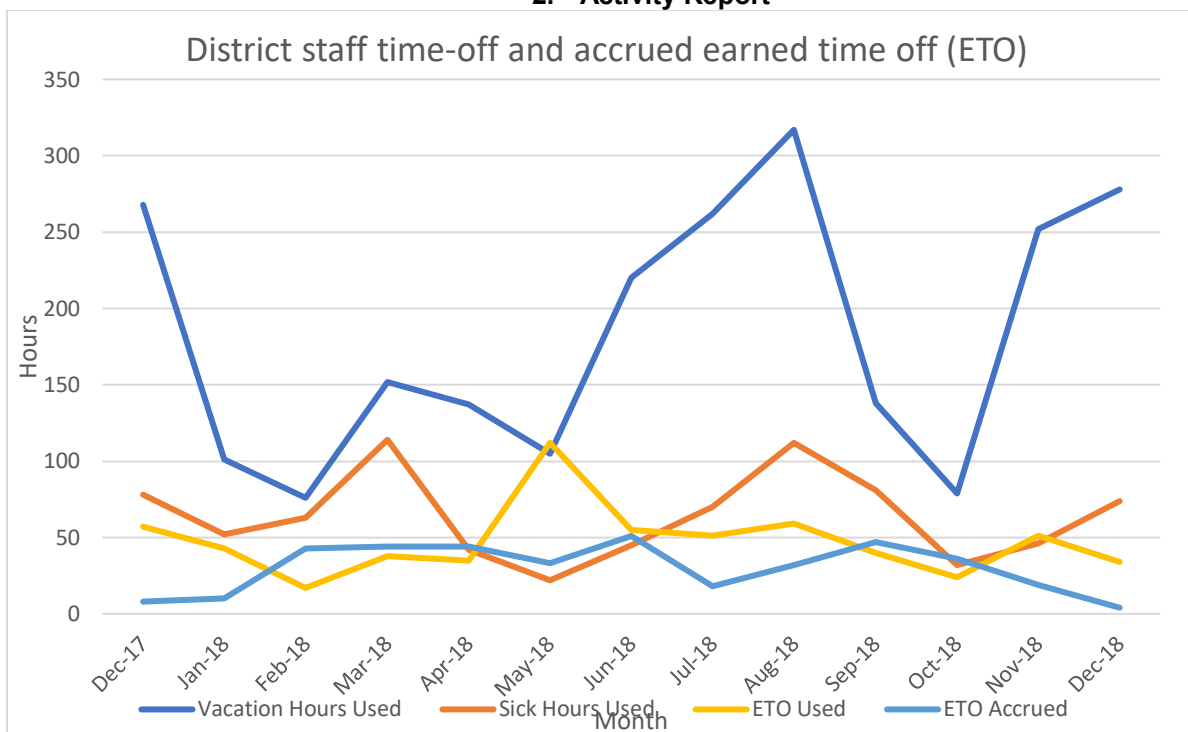
Joseph Huston
Field Operations Supervisor

A. District Data

1. Service Requests

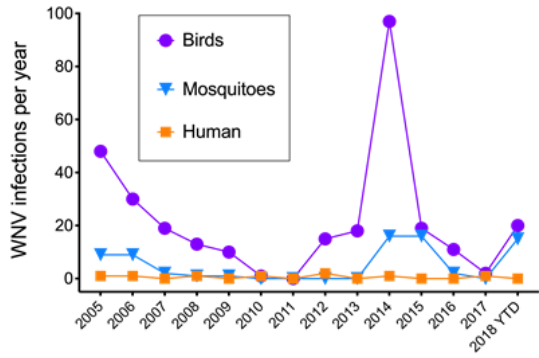


2. Activity Report

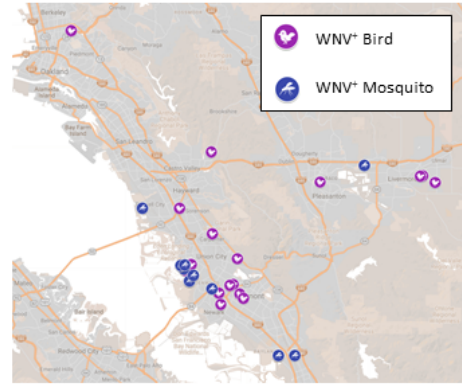


3. WNV Activity

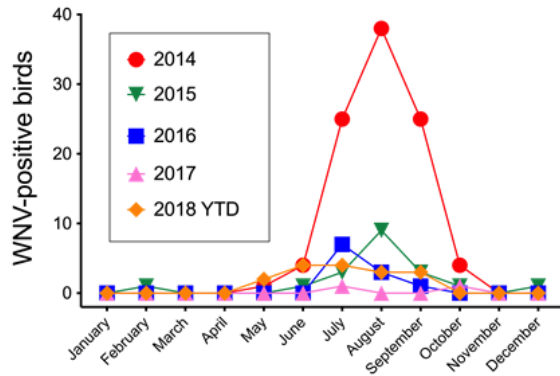
WNV infections detected in Alameda County
2005 – 2018 YTD



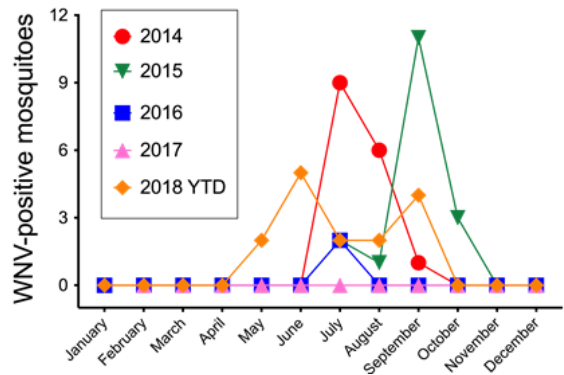
Locations of WNV-infected mosquitoes and birds
collected in Alameda County during 2018



WNV-infected birds collected in
Alameda County



WNV-infected mosquitoes collected in
Alameda County



2. LAB

Summary

- West Nile virus (WNV) was not detected in birds or mosquitoes during the month of December.
- Mosquito abundance in December was similar to the prior month.
- The ACMAD drone was used to image the landscape of Ecology Marsh to evaluate the impact of ditching on water accumulation in the marsh.

Arbovirus Monitoring

- West Nile virus (WNV) was not detected in birds or mosquitoes during the month of December. During 2018, a total of 20 birds and 15 collections of mosquitoes have been found to contain WNV.
- None of the mosquitoes or birds that were collected during 2018 were found to contain Saint Louis encephalitis virus (SLEV) or Western equine encephalitis virus (WEEV).

Native Mosquito Abundance

- For the month of December, there was 1.11 inches of rainfall and the average maximum temperature was 58 °F, (Hayward, CA). The prior two months had average maximum temperatures of 68 °F and 72 °F.
- EVS CO₂ traps were not placed during the month of December because of the rainfall and cooler temperatures.
- Mosquito abundance, as measured using NJLT, was similar to the prior month (Figure 1; 0.75 vs 0.47 mosquitoes / trap night, respectively; total of 418 mosquitoes over 560 trap nights). *Culiseta incidens* was the most prevalent species collected in NJLT during December 2018, followed by *Culex tarsalis* and *Culiseta incidens* (Figure 2).

Invasive Aedes Monitoring

- Invasive *Aedes* mosquitoes have not been detected in any mosquito trap placed in Alameda County during 2018. The only *Aedes* spp. of mosquito eggs that have been collected in oviposition traps were confirmed to be *Aedes sierrensis*.

Aerial Imaging Prior to Ditching

- Prior to ditching, the landscape of Ecology Marsh in Union City was fully imaged using the ACMAD drone and multispectral camera (Figure 3; 3.47 square miles, or 135 acres). Pre- and post-ditching imagery will be compared to determine the impact of ditching on water retention in the marsh.

FIGURES

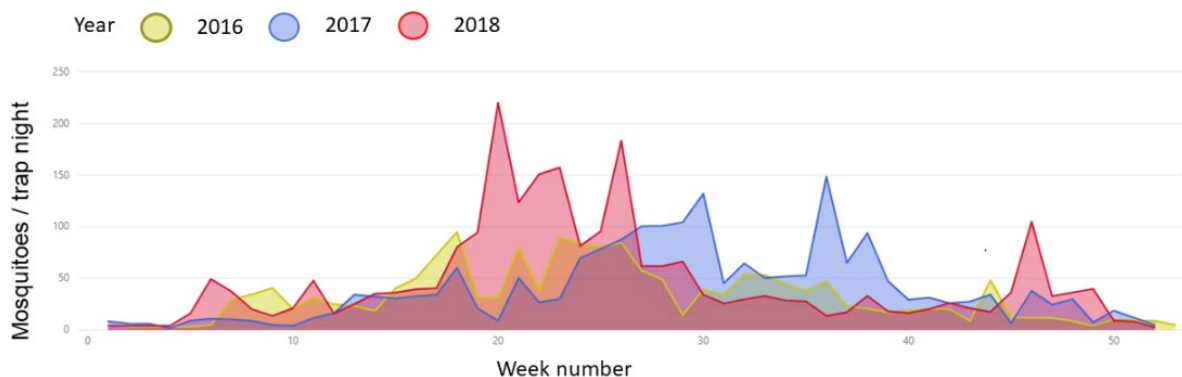


Figure 1. Mosquitoes captured in NJLT from 2016 – 2018. A total of 418 mosquitoes were captured in NJLT during December 2018 and identified to species.

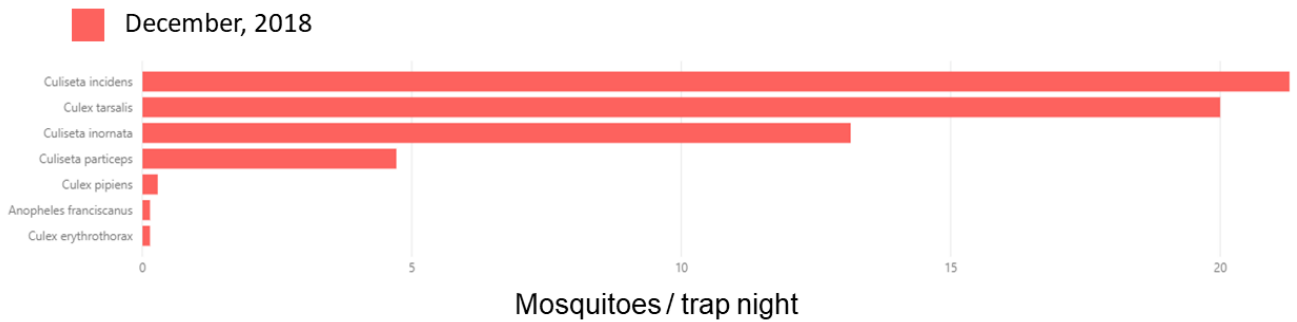


Figure 2. The six most abundant species of mosquito captured in NJLT during December 2018.

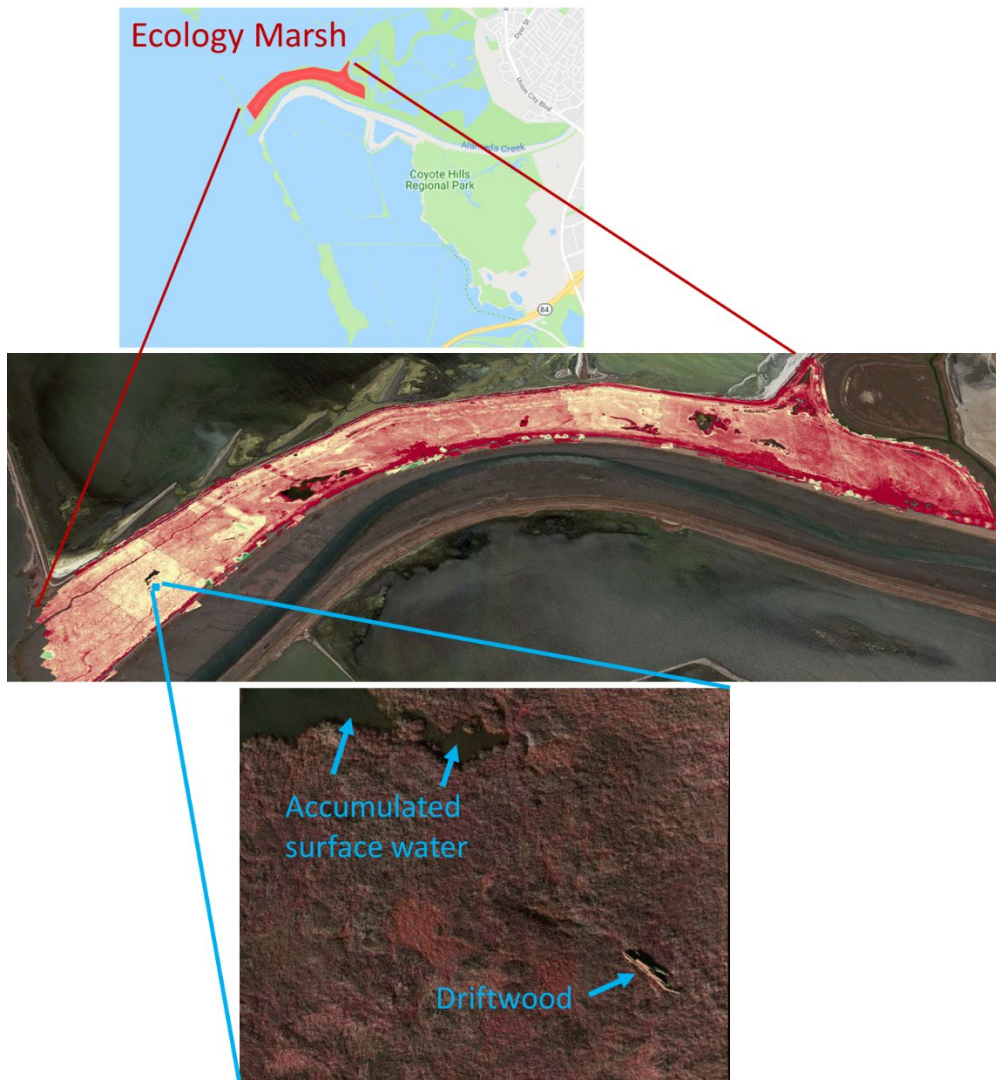


Figure 3. Multispectral aerial imagery of Ecology Marsh prior to ditching. A DJI Matrice 210 RTK drone that was fitted with a Siantrange 3px multispectral camera was used to image Ecology Marsh in Union City, CA at a resolution of 1.8 cm / pixel (top image highlighted in red; 3.47 square miles). Preliminary analysis of the orthomosaic map for green normalized difference vegetation index (NDVI) shows that the marsh was fully imaged and that a high proportion of the marsh contains plants having a red color profile (middle image). This suggests that the plant community in this marsh is comprised predominantly of red-colored *Salicornia* spp. (*i.e.* pickleweed; a plant that is a preferred oviposition substrate for *Aedes dorsalis*). Empty spaces on the green NDVI orthomosaic map indicate highly reflective surfaces, such as accumulated water. The lower panel is a 90 square foot image captured by the multispectral camera that shows accumulated water and driftwood indicated by blue

arrows. Ongoing analysis of the data will quantify the area of Ecology Marsh that has surface water prior to ditching. Aerial imaging during 2019 is aimed at quantifying the impact of ditching for reducing the quantity of accumulated water that supports the breeding of *Ae. dorsalis*.

PUBLIC EDUCATION

A. Events

i. Upcoming

- **Career Day Presentation** – Friday, January 11th (Oakland)
- **UC Berkeley Center for Emerging & Neglected Diseases (CEND) Symposium “Tech Show & Tell”** – Friday, January 11th (UC Berkeley)
- **Spring Home & Garden Show** – Friday, February 15th to Sunday, February 17th (Pleasanton)
- **St. Patrick’s Day Celebration** – Saturday, March 16th & Sunday, March 17th (Dublin)

B. Google Analytics

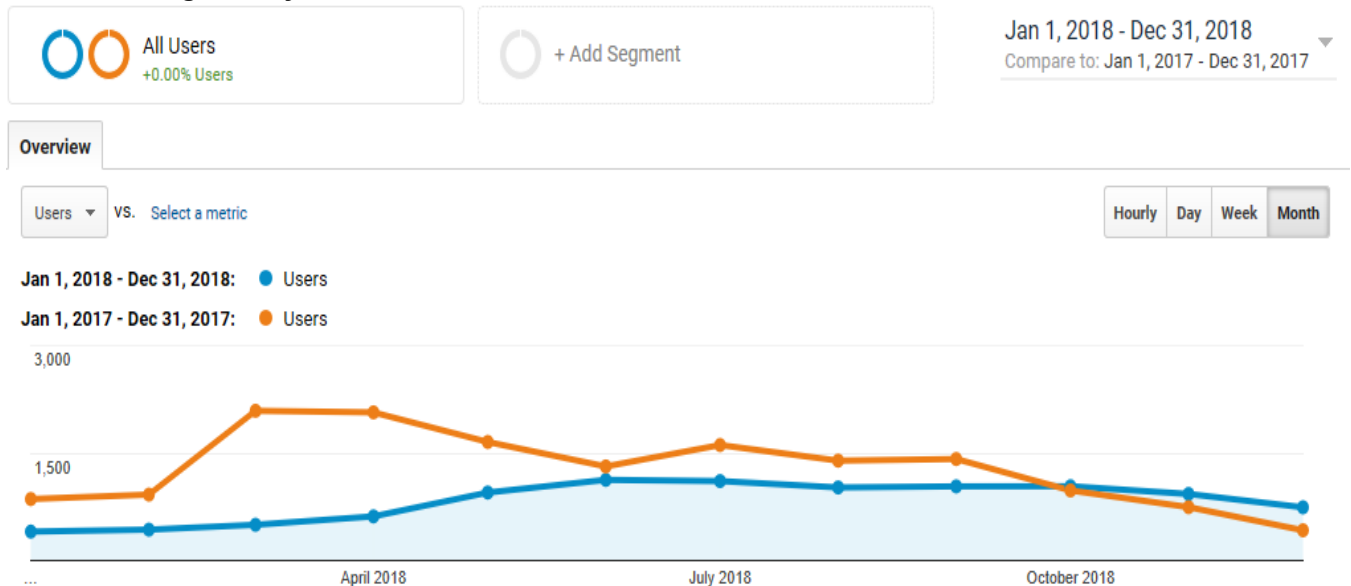


Figure 2. Comparison of website users over the past two years

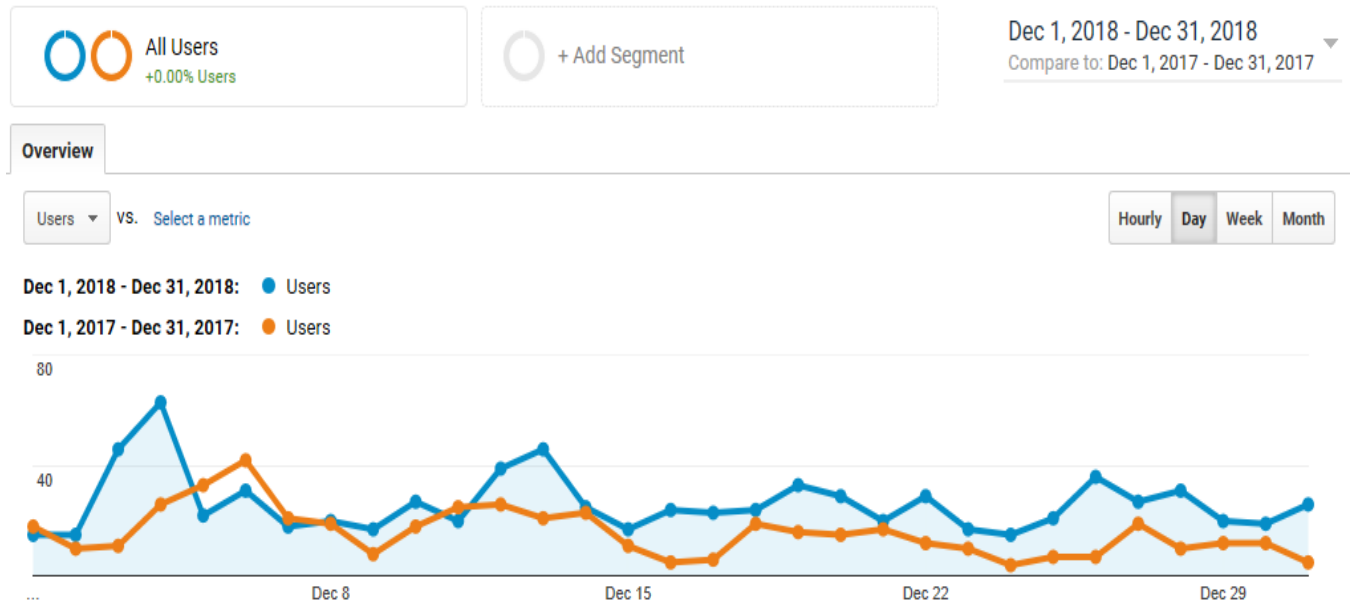
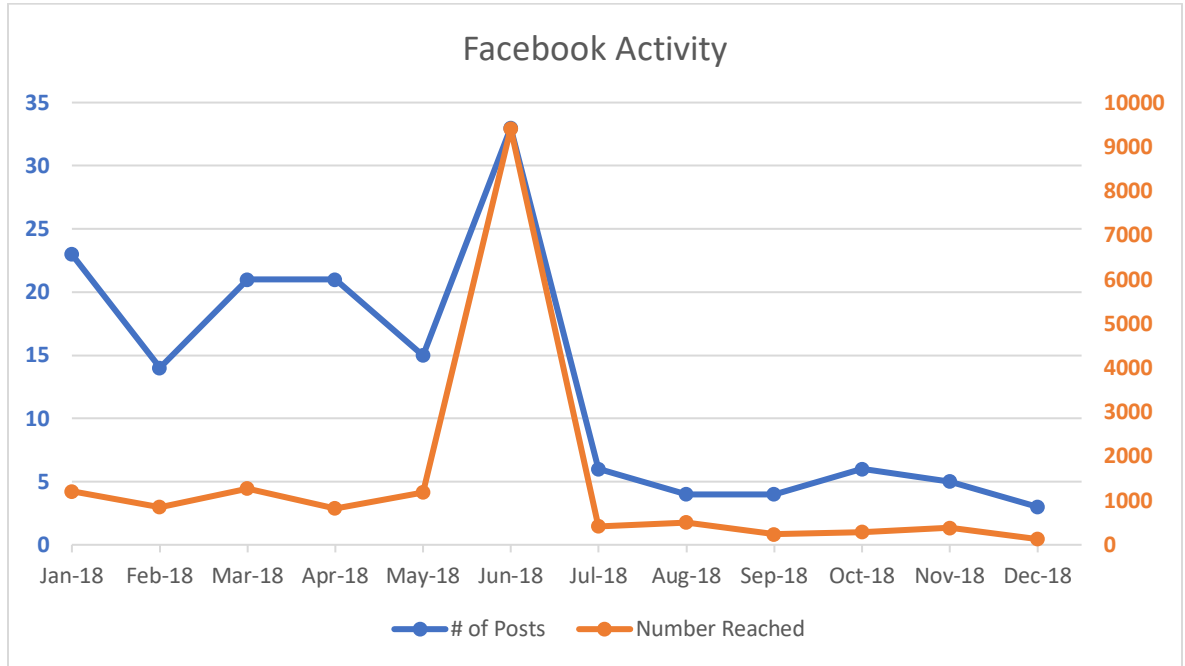


Figure 3. Comparison of website users over the past two years for the month of December.

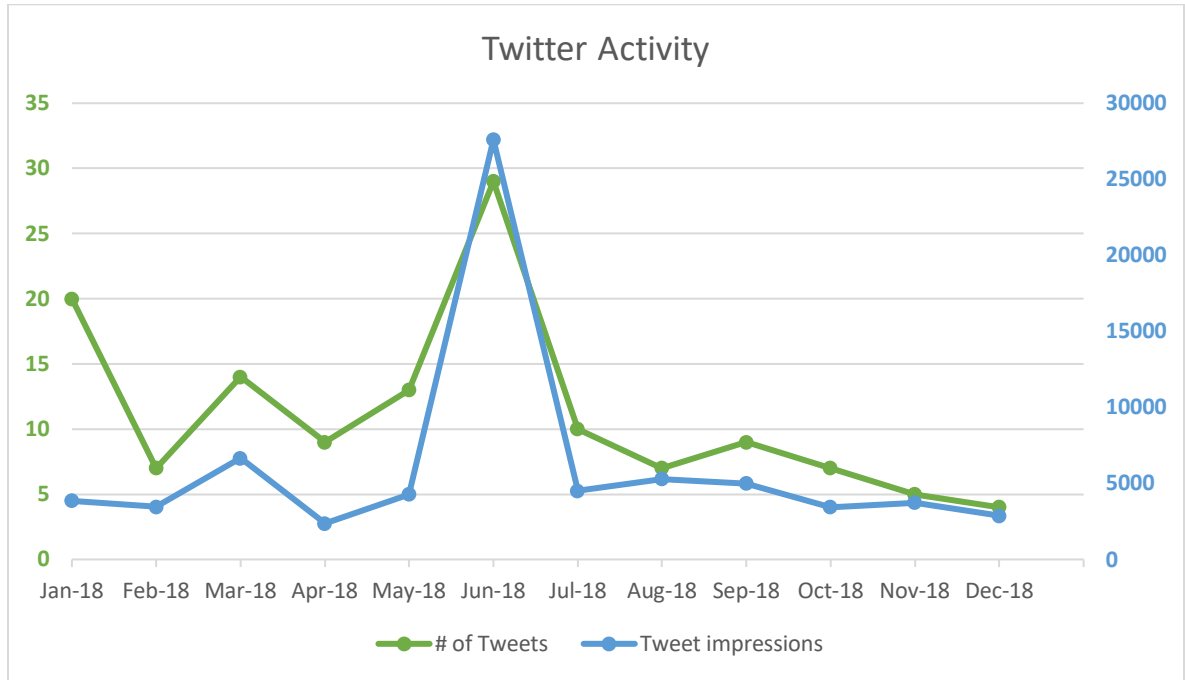
C. Facebook



Total Number of Followers: 174 (up from 173 in November)

December's Most Popular Post: We are hoping everyone has a safe holiday weekend. Happy Holidays from ACMAD! (Photo)

D. Twitter

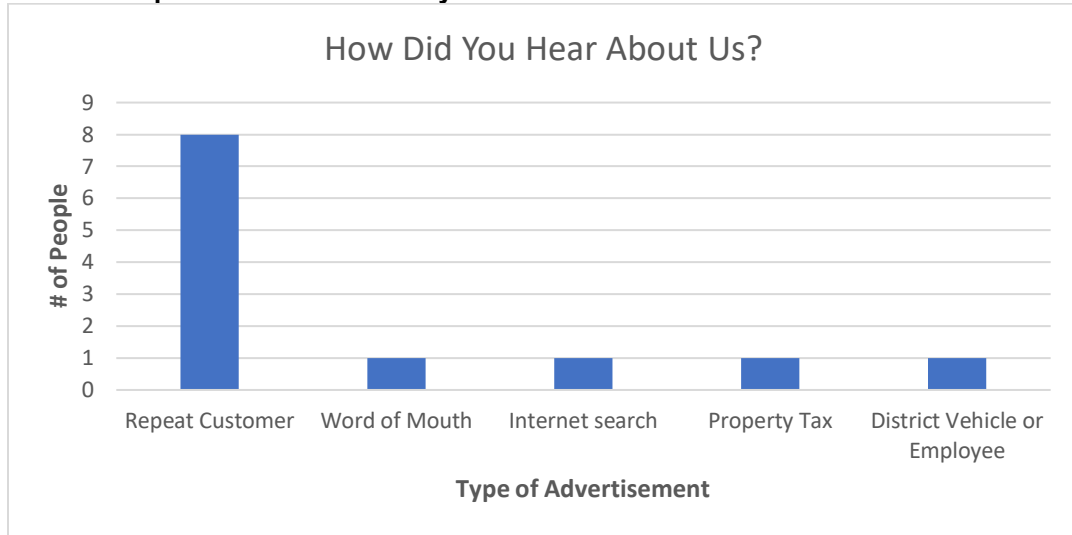


Number of Profile Visits in October: 46

Total Number of Followers (New This Month): 617 (up from 615 in November)

Top November Tweet: We are hoping everyone has a safe holiday weekend. Happy Holidays from ACMAD! (photo)

E. Service Request Referral Summary



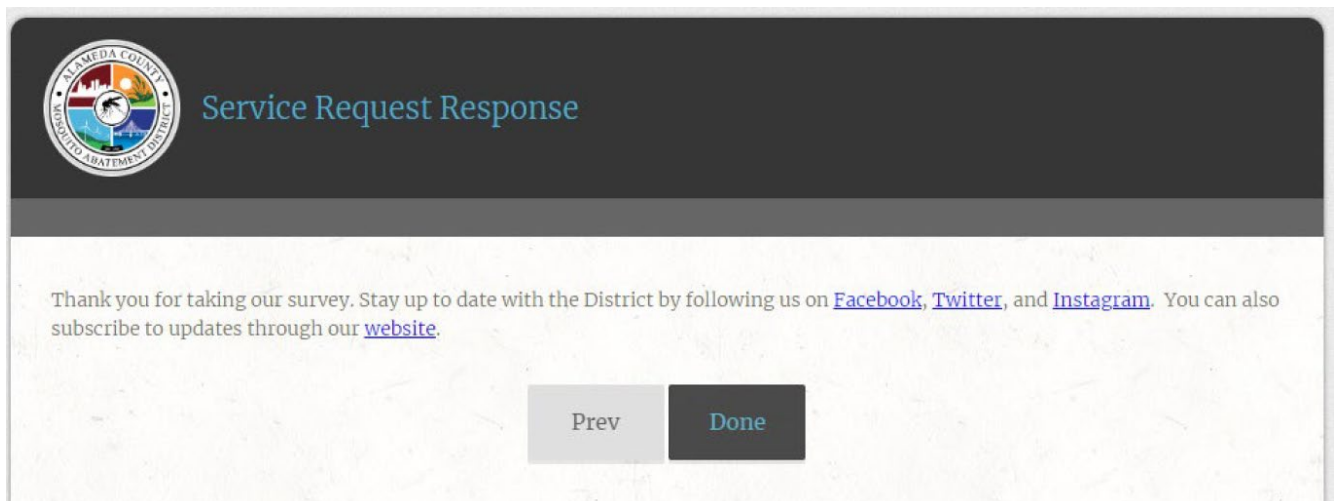
Note: Event, Social Media, Other, Internet Ad, Billboard Ad, Movie Theater Ads, Phone Book, and News Story are also options for this question, but were not included on this chart, because they were not selected in the month of December.

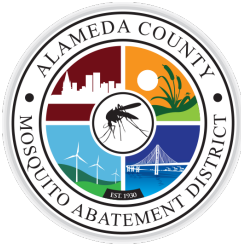
4. LEGISLATIVE UPDATE:

The District sent a comment letter to the CA Department of Pesticide Regulations (DPR) regarding proposed regulatory action regarding the Pest Control Aircraft Pilot Certification. While a bill was signed into law in the 2017 legislative session allowing mosquito abatement districts to apply pesticides with UAS technology without a pilot’s license, the regulations to allow for this application are still being considered by DPR staff. Our letter, on behalf of the District and MVCAC, support the regulatory process while providing background to our intended use.

5. OTHER UPDATES:

Member of the Board requested promotion of our social media to those who request service. The following is a screenshot of a page that was added to our survey questionnaire.





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Trustee Anniversary Recognitions:

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Pleasanton

Ed Hernandez

San Leandro

Subru Bhat

Union City

Ryan Clausnitzer

General Manager

Background:

ACMAD is pleased to recognize and thank the following Trustees on their anniversaries in the month of January

Trustee	City	Years of Service	Anniversary Date
James N. Doggett	Livermore	41	January 1st
Eric Hentschke	Newark	3	January 14th
Ed Hernandez	San Leandro	2	January 3rd
Subru Bhat	Union City	1	January 9th
Alan Brown	Dublin	1	January 9th

2018/2019 Statement of Economic Interests



Form 700

A Public Document

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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 3000 • Sacramento, CA 95811

Email Advice: 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

December 2018

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. Be sure to 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, 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
- (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.

What's New

Gift Limit Increase

The gift limit increased to \$500 for calendar years 2019 and 2020. The gift limit in 2018 was \$470.

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.

- Members of newly created boards and commissions not yet covered under a conflict of interest code
- Employees in newly created positions of existing agencies

See Reference Pamphlet, page 3, at 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 Boards and Commissions of Newly Created Agencies:

File with your newly created agency or with your agency's code reviewing body.

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 with your local elections office.

How to file:

The Form 700 is available at www.fppc.ca.gov. Form 700 schedules are also available in Excel format. All statements must have an original "wet" signature or be duly authorized by your filing officer to file electronically under Government Code Section 87500.2.

When to file:

Annual Statements

⇒ March 1, 2019

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

⇒ April 2, 2019

- Most other filers

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

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, 2018, and December 31, 2018, and filed an assuming office statement, you are not required to file an annual statement until March 2, 2020, or April 1, 2020, whichever is applicable. In that case, the annual statement will cover the day after you assumed office through December 31, 2019. (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. Obtain amendment schedules at 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.

- 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 is reportable.

For positions subject to confirmation by the State Senate or the Commission on Judicial Performance, 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 she 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.

- 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 is reportable.

Annual Statement:

Generally, the period covered is January 1, 2018, through December 31, 2018. If the period covered by the statement is different than January 1, 2018, through December 31, 2018, (for example, you assumed office between October 1, 2017, and December 31, 2017 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 2018.

- 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, 2018, through the date you stopped performing the duties of your position. If the period covered differs from January 1, 2018, through the date you stopped performing the duties of your position (for example, you assumed office between October 1, 2017, and December 31, 2017, or you are combining statements), the period covered must be specified. The reporting period can cover parts of two calendar years.

- 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 2018.

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.

Note that once you file your statement, you may not withdraw it. All changes must be noted on amendment schedules.

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 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, 2018, through December 31, 2018.
Leaving Office: Date Left
Assuming Office: Date assumed
Candidate: Date of Election and office sought, if different than Part 1:

4. Schedule Summary (must complete) Total number of pages including this cover page:

Schedules attached

- Schedule A-1 - Investments - schedule attached
Schedule A-2 - Investments - schedule attached
Schedule B - Real Property - schedule attached
Schedule C - Income, Loans, & Business Positions - schedule attached
Schedule D - Income - Gifts - 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 Signature
(month, day, year) (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 statements with each agency. To simplify your filing obligations, you may complete an expanded statement.
- To do this, enter the name of the other agency(ies) with which you are required to file and your position title(s) in the space provided. **Do not use acronyms.** Attach an additional sheet if necessary. Complete one statement covering the disclosure requirements for all positions. Each copy must contain an original signature. Therefore, before signing the statement, make a copy for each agency. Sign each copy with an original signature and file with each agency.

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 his or her 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 Placer and Yuba counties. Brian will complete one Form 700 using full disclosure (as required for the city position) and covering interests in both Placer and Yuba counties (as required for the multi-county position) and list both positions on the Cover Page. Before signing the statement, Brian will make a copy and sign both statements. One statement will be filed with City of Lincoln and the other will be filed with Camp Far West Irrigation District. Both will contain an original signature.

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.

1. Office, Agency, or Court	
Agency Name (Do not use acronyms) Feather River Irrigation District	
Division, Board, Department, District, if applicable N/A	Your Position Board Member
▶ If filing for multiple positions, list below or on an attachment. (Do not use acronyms)	
Agency: N/A	Position: _____
2. Jurisdiction of Office (Check at least one box)	
<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 2018 annual statement, **do not** change the pre-printed dates to reflect 2019. Your annual statement is used for reporting the **previous year's** economic interests. Economic interests for your annual filing covering January 1, 2019, through December 31, 2019, will be disclosed on your statement filed in 2020. See Reference Pamphlet, page 4.

Combining Statements: Certain types of statements 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. All statements must have an original “wet” signature or be duly authorized by your filing officer to file electronically under Government Code Section 87500.2.

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:
_____/_____/18 ____/_____/18
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:
_____/_____/18 ____/_____/18
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:
_____/_____/18 ____/_____/18
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:
_____/_____/18 ____/_____/18
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:
_____/_____/18 ____/_____/18
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:
_____/_____/18 ____/_____/18
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
- Insurance policies
- Annuities
- Commodities
- Shares in a credit union
- Government bonds (including municipal bonds)
- 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.
- 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. His conflict of interest code requires full disclosure of investments. Frank must disclose his 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 his spouse or registered domestic partner and dependent children.

Alice Lance is a city council member. She 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.

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.

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

<p>FAIR MARKET VALUE</p> <input type="checkbox"/> \$0 - \$1,999 <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	<p>IF APPLICABLE, LIST DATE:</p> <p style="text-align: center;">____/____/18 ____/____/18</p> <p style="text-align: center;">ACQUIRED DISPOSED</p>
--	--

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

<p>FAIR MARKET VALUE</p> <input type="checkbox"/> \$0 - \$1,999 <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	<p>IF APPLICABLE, LIST DATE:</p> <p style="text-align: center;">____/____/18 ____/____/18</p> <p style="text-align: center;">ACQUIRED DISPOSED</p>
--	--

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)

<input type="checkbox"/> \$0 - \$499	<input type="checkbox"/> \$10,001 - \$100,000
<input type="checkbox"/> \$500 - \$1,000	<input type="checkbox"/> OVER \$100,000
<input type="checkbox"/> \$1,001 - \$10,000	

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

<input type="checkbox"/> \$0 - \$499	<input type="checkbox"/> \$10,001 - \$100,000
<input type="checkbox"/> \$500 - \$1,000	<input type="checkbox"/> OVER \$100,000
<input type="checkbox"/> \$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 _____

<p>FAIR MARKET VALUE</p> <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	<p>IF APPLICABLE, LIST DATE:</p> <p style="text-align: center;">____/____/18 ____/____/18</p> <p style="text-align: center;">ACQUIRED DISPOSED</p>
--	--

NATURE OF INTEREST
 Property Ownership/Deed of Trust Stock Partnership

Leasehold _____ Yrs. remaining Other _____

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 _____

<p>FAIR MARKET VALUE</p> <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	<p>IF APPLICABLE, LIST DATE:</p> <p style="text-align: center;">____/____/18 ____/____/18</p> <p style="text-align: center;">ACQUIRED DISPOSED</p>
--	--

NATURE OF INTEREST
 Property Ownership/Deed of Trust Stock Partnership

Leasehold _____ Yrs. remaining Other _____

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.

SCHEDULE B
Interests in Real Property
 (Including Rental Income)

Name _____

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS _____

CITY _____

FAIR MARKET VALUE IF APPLICABLE, LIST DATE:

\$2,000 - \$10,000 _____/_____/18

\$10,001 - \$100,000 _____/_____/18

\$100,001 - \$1,000,000 ACQUIRED DISPOSED

Over \$1,000,000

NATURE OF INTEREST

Ownership/Deed of Trust Easement

Leasehold _____ _____

Yrs. remaining Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

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

\$10,001 - \$100,000 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.

None

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS _____

CITY _____

FAIR MARKET VALUE IF APPLICABLE, LIST DATE:

\$2,000 - \$10,000 _____/_____/18

\$10,001 - \$100,000 _____/_____/18

\$100,001 - \$1,000,000 ACQUIRED DISPOSED

Over \$1,000,000

NATURE OF INTEREST

Ownership/Deed of Trust Easement

Leasehold _____ _____

Yrs. remaining Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

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

\$10,001 - \$100,000 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.

None

* You are not required to report loans from a commercial lending institution made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER* _____

ADDRESS (Business Address Acceptable) _____

BUSINESS ACTIVITY, IF ANY, OF LENDER _____

INTEREST RATE TERM (Months/Years)

_____% None _____

HIGHEST BALANCE DURING REPORTING PERIOD

\$500 - \$1,000 \$1,001 - \$10,000

\$10,001 - \$100,000 OVER \$100,000

Guarantor, if applicable

NAME OF LENDER* _____

ADDRESS (Business Address Acceptable) _____

BUSINESS ACTIVITY, IF ANY, OF LENDER _____

INTEREST RATE TERM (Months/Years)

_____% None _____

HIGHEST BALANCE DURING REPORTING PERIOD

\$500 - \$1,000 \$1,001 - \$10,000

\$10,001 - \$100,000 OVER \$100,000

Guarantor, if applicable

Comments: _____

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.)

Please note: A non-reportable residence can still be grounds for a conflict of interest and may be disqualifying.

- Interests in real property held through a blind trust (See Reference Pamphlet, page 16.)

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, disclose the number of years remaining on the lease.

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?

- 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 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, she received rental income of \$12,000, from a single tenant who rented property she 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 4600 24th Street	
CITY Sacramento	
FAIR MARKET VALUE <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input checked="" type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	IF APPLICABLE, LIST DATE: ACQUIRED _____ DISPOSED _____ 18 18
NATURE OF INTEREST <input type="checkbox"/> Ownership/Deed of Trust <input type="checkbox"/> Easement <input type="checkbox"/> Leasehold Yrs. remaining _____ Other _____	
IF RENTAL PROPERTY, GROSS INCOME PERIOD <input type="checkbox"/> \$0 - \$499 <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	
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 Henry Wells	
NAME OF LENDER* Sophia Petroillo	
ADDRESS (Business Address Acceptable) 2121 Blue Sky Parkway, Sacramento	
BUSINESS ACTIVITY, IF ANY, OF LENDER Restaurant Owner	
INTEREST RATE 8 % <input type="checkbox"/> None	TERM (Months/Years) 15 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: _____	

SCHEDULE C

Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name _____

▶ 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME _____

ADDRESS *(Business Address Acceptable)* _____

BUSINESS ACTIVITY, IF ANY, OF SOURCE _____

YOUR BUSINESS POSITION _____

GROSS INCOME RECEIVED No Income - Business Position Only

\$500 - \$1,000 \$1,001 - \$10,000

\$10,001 - \$100,000 OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

Salary Spouse's or registered domestic partner's income
(For self-employed use Schedule A-2.)

Partnership (Less than 10% ownership. For 10% or greater use
Schedule A-2.)

Sale of _____
(Real property, car, boat, etc.)

Loan repayment

Commission or Rental Income, list each source of \$10,000 or more

_____ *(Describe)*

Other _____
(Describe)

NAME OF SOURCE OF INCOME _____

ADDRESS *(Business Address Acceptable)* _____

BUSINESS ACTIVITY, IF ANY, OF SOURCE _____

YOUR BUSINESS POSITION _____

GROSS INCOME RECEIVED No Income - Business Position Only

\$500 - \$1,000 \$1,001 - \$10,000

\$10,001 - \$100,000 OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

Salary Spouse's or registered domestic partner's income
(For self-employed use Schedule A-2.)

Partnership (Less than 10% ownership. For 10% or greater use
Schedule A-2.)

Sale of _____
(Real property, car, boat, etc.)

Loan repayment

Commission or Rental Income, list each source of \$10,000 or more

_____ *(Describe)*

Other _____
(Describe)

▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER* _____

ADDRESS *(Business Address Acceptable)* _____

BUSINESS ACTIVITY, IF ANY, OF LENDER _____

HIGHEST BALANCE DURING REPORTING PERIOD

\$500 - \$1,000

\$1,001 - \$10,000

\$10,001 - \$100,000

OVER \$100,000

INTEREST RATE TERM (Months/Years)

_____ % None _____

SECURITY FOR LOAN

None Personal residence

Real Property _____
Street address

_____ *City*

Guarantor _____

Other _____
(Describe)

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 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

You are **not** required to disclose:

Reminders

- Gifts from a single source are subject to a \$500 limit in 2019. (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.

- 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.

Name _____

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

- 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 \$50 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 her 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 she is not providing services are likely considered gifts. Note that the same payment from a 501(c)3 would NOT be reportable.

▶ 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: \$ 150.00
(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>	

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 his 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. 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.)

▶ 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	
Sichuan Sheng, China	

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 personal assets and income. They also must disqualify themselves from participating in decisions that may affect their personal economic interests. 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 law's provisions.

Gift Prohibition

Gifts received by most state and local officials, employees, and candidates are subject to a limit. In 2017 and 2018, the gift limit was \$470 from a single source during a calendar year. In 2019-2020, the gift limit increased to \$500 from a single source during a calendar year.

In addition, 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 at 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.
- 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

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 complete one statement listing the county and the two boards on the Cover Page or an attachment as the agencies for which you will be filing. Report your economic interests using the largest jurisdiction and highest disclosure requirements assigned to you by the three agencies. Make two copies of the entire statement before signing it, sign each copy with an original signature, and distribute one original to the county and to each of the two boards. 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.
- 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.

Questions and Answers Continued

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. (See Reference Pamphlet, page 14.)

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.

Questions and Answers Continued

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 husband is a partner in a four-person firm where all of his business is based on his 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 husband's investment in the firm is 10% or greater, disclose 100% of his share of the business on Schedule A-2, Part 1 and 50% of his income on Schedule A-2, Parts 2 and 3. For example, a client of your husband'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 real property for you.

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.

Questions and Answers Continued

- 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 2018 the gift limit was \$470, so the Bensons may have given the supervisor artwork valued at no more than \$940. 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.



SHOWCASE YOUR COMMITMENT TO EXCELLENCE

District of Distinction Application

The District of Distinction is an accreditation program that enables districts to demonstrate to their communities, the media and legislators their commitment to operate in a sound, responsible manner. Districts apply for designation as a District of Distinction by submitting financial audits, policies and procedures and proof of training received by directors and executive staff.

Requirements:

FINANCIAL AUDITS

Districts must demonstrate they undergo regular financial audits, have no major deficiencies and apply any recommendations to future years.

What to submit:

- Copies of the three most recent district audits, including financial statements (3), SAS 114 and management letters (3). Each audit, including findings and recommendations, will be reviewed by a member of the Certification & Audit Review Advisory Committee. Committee members are volunteers from the special district community, including district controllers, directors of finance and SDA certified general managers.

POLICIES AND PROCEDURES

Districts must demonstrate that their operations conform to all statutes and regulations under state law as reflected in a policies and procedures manual. Policies and procedures should focus on governance, ethics, board conduct, district finances, reserves, reimbursement/compensation, etc.

What to submit:

- Copy of your district's current approved policies and procedures manual.
- Copy of your district's Board minute action adopting and/or having reviewed the policies and procedures manual within the past year.

TRAINING

What to submit:

Documentation showing class attendance, such as certificate of completion for each board member, general manager and other executive staff members (as identified by the board) in the following areas:

- Governance Training:** Six hours of basic governance training within the past five years. *Governance Foundations*, offered by CSDA's Special District Leadership Academy, satisfies this requirement. Other courses may qualify as well, however will need to be submitted for review by SDLF. Also, *Board Member Best Practices* (3 hours) plus 2 approved webinars will satisfy that requirement. Approved webinars are:
Board Member and District Liability Issues, Must Have Communication Protocols for Board & Staff, and Who Does What? Best Practices in Board Staff Relations.
**Districts with boards larger than 7 need at least a majority of total board members completing this training requirement.*
- Ethics Training:** Documentation verifying completion of AB 1234 ethics compliance training within the last two years.
- Harassment Prevention Training:** Documentation verifying completion of AB 1825 harassment prevention training within the last two years.

OTHER

Districts must also include the following items with the accreditation/re-accreditation application:

What to submit:

- Board of Directors roster
- List of executive staff, including titles
- Completed application for accreditation/re-accreditation
- Accreditation/re-accreditation application fee
- Completed SDLF District Transparency Certificate of Excellence

Who should apply to be a District of Distinction?

Any California special district that wants to demonstrate publicly the effectiveness of its operations. Applying for this designation shows that your district understands and respects the responsibilities inherent to providing essential public services in a fiscally responsible manner.

What does a district receive for completing the program?

Districts of Distinction earn the right to use the program’s seal on district materials and a plaque honoring their accomplishment. SDLF will also send a letter to a local publication and notify legislators on a district’s behalf. The District will also receive a Legislative Resolution.

How does a district apply?

Districts interested in earning the Districts of Distinction designation must complete the application and submit it along with the required documentation. Applications must also be accompanied by an application fee.

If my district is a member of the Special District Risk Management Authority (SDRMA), will getting a District of Distinction accreditation save me money on my premiums?

Yes. SDRMA offers Credit Incentive Points (CIPs) if your district earns the District of Distinction accreditation which can provide significant premium discounts. For more information, contact SDRMA at 800.537.7790 or visit www.sdrma.org.

RE-ACCREDITATION

For how long is the designation valid?

The Districts of Distinction designation is valid for two years and a district may be re-accredited by submitting the application and all current required documents for review along with the re-accreditation fee.

Fees

The fees are on a sliding scale, based on a district’s budget:

INITIAL ACCREDITATION & RE-ACCREDITATION

Annual operating budget	Fee
\$0-299,999	\$125
\$300,000-749,999	\$150
\$750,000-999,999	\$175
\$1,000,000--2,999,999	\$200
\$3,000,000 or more	\$250

Submit this application along with all required documentation and payment to:

Special District Leadership Foundation
 1112 I Street, Suite 200
 Sacramento, CA 95814
 Phone: 916-231-2909 • Fax: 916-442-7889 • sdlf.org

Electronic filing is preferable.

Contact SDLF for instructions.

District:		
Mailing Address:		
City:	State:	Zip:
Contact Name:	Title:	
Phone:	Fax:	
Email:	Website:	
Assembly Member(s)*:		
Senator*:		
Local Newspaper(s):		
I certify that the information submitted is accurate and complete to the best of my knowledge.		Signature:

SILVER, GOLD OR PLATINUM RECOGNITION

Board Members who have received Recognition in Special District Governance: (attach additional pages if necessary)

	Date:
	Date:
	Date:

General Manager:

Has completed Recognition in Special District Governance

Has completed Recognition in Special District Administrator

PAYMENT

Total: \$ Check Visa Mastercard Discover American Express

Acct. Name: Acct. Number:

Expiration Date: Authorized Signature: