

BOARD OF DIRECTORS

Teresa Higgins – Chair
Michael Seaman – Vice Chair
Kathy Stricklin – Secretary
Laura Lavallee – Director
Chris Fischer – Director



FULTON-EL CAMINO RECREATION AND PARK DISTRICT

REGULAR BOARD OR DIRECTORS MEETING

AGENDA

Thursday, July 16, 2026 | 6:30 p.m.
Richard T. Conzelmann Community Center
2201 Cottage Way, Sacramento, CA 95825

Board Room

TELECONFERENCE ACCESS (Supplemental)

Zoom: <https://us02web.zoom.us/j/85394669812>
Dial-In: +1 (669) 900-9128 (U.S.)

Members of the public may attend the meeting in person at the location listed above.

MISSION STATEMENT

Enhance the quality of life for our community by providing park facilities and recreation programs of exceptional quality while maintaining and protecting our parklands for future generations.

1. CALL TO ORDER / ROLL CALL

- 1.1. Consideration of Request for Remote Participation Pursuant to Government Code Section 54953(f) – Just Cause

Consider and determine whether Board Chair Teresa Higgins qualifies for remote participation pursuant to Government Code Section 54953(f) based upon a qualifying just cause circumstance and, if so, approve the request.

2. PLEDGE OF ALLEGIANCE

3. PUBLIC COMMENT

Non-Agenda Items

Members of the public may address the Board on items **not listed on this agenda** that are within the subject matter jurisdiction of the District. Individual comments are limited to **three (3) minutes**, unless otherwise determined by the Chair. Pursuant to the Brown Act, the Board **may not discuss or take action** on any item not appearing on the agenda. Board members may:

- Ask brief clarifying questions
- Request staff to report back at a future meeting
- Refer matters to staff

Members seeking a response to a specific question are encouraged to contact the General

Manager.

Agenda Items

Public comment on agenda items will be taken **at the time each item is considered**.

Public Comment Procedures

- **In person:** Complete a speaker card and submit it to the Clerk of the Board.
- **Zoom/Phone:** When recognized by the Chair, state your name and the item you wish to address.

4. CONSENT ITEMS (Motion)

The Consent Calendar items are those expected to be routine and noncontroversial. They will be acted upon by the Board of Directors after providing an opportunity for public comment.

4.1 Approve the Minutes of the June 2026 Regular Board & Committee Meetings

4.2 Accept Financial Activity

- a. Summary Financial Statement of Activity YTD June 2026
- b. Receive the Program Revenue and Refund Report for June 2026
- c. Receive Revolving Fund Report for June 2026
- d. Receive the Payroll Report for June 2026
- e. Receive Claims for June 2026
- f. Receive Parks, Recreation, and Facility Rentals Report June 2026

4.3 General Manager's Monthly Update

5. PRESENTATIONS

5.1 Sacramento Department of Transportation project engineer, Dane Coyle, will present on the Bike Lane project on Bell Street along Howe Park.

6. DISCUSSION AND DIRECTION ITEMS (Motion or Approval Required)

The Board will review and discuss taking appropriate action on the following matters:

6.1 Public Hearings and Approval of Resolution Nos. 2026/27-1 and 2026/27-2 Approving Engineer's Reports, Confirming Diagram and Assessment and Ordering Continuation of Assessment for Fiscal Year 2026-27 for the Parks Maintenance and Recreation Improvement Assessment Districts (Assessment # 1 and Assessment # 2).

6.2 A Resolution Adopting A Records Retention Schedule, Updating The Records Retention Policy, And Authorizing Destruction Of Certain Agency Records
The Board will consider updating the Records Retention policy and schedules.

7. INFORMATIONAL ITEMS (No Action Required)

7.1 FEC 70th Anniversary Gala Fundraiser on June 27, 2026 in Howe Park

7.2 Movie Nights at Cottage Park Pool

7.3 FEC Hall & Picnic Rentals, Events & Other Special Events – June 2026

8. CORRESPONDENCE/ANNOUNCEMENTS

8.1 Assembly Committee On Water, Parks, And Wildlife, AB 2578 (Rogers) – As Introduced February 20, 2026

8.2 CSDA 2026 Mid-Year Legislative Report

9. COMMITTEE REPORTS

a. Personnel and Finance – Chair, Director Lavallee

- b. Programs, Facilities and Projects – Chair, Director Seaman
- c. Community Relations – Chair, Director Stricklin, did not meet

10. FUTURE AGENDA ITEMS/MATTERS INITIATED/ANNOUNCEMENTS BY THE DIRECTORS

11. FUTURE AGENDA ITEMS/MATTERS INITIATED/ANNOUNCEMENTS BY THE GENERAL MANAGER

12. ADJOURNMENT

13. SIGN ALL APPROVED DOCUMENTS

Next Regular Board Meeting on Thursday, August 20, 2026

AMERICANS WITH DISABILITIES ACT ACCOMMODATIONS – *If you are a person with a disability and you need a disability-related modification or accommodation to participate in this meeting, then please contact Mike Chahal at (916) 927-3802 or fax (916) 927-3805. Requests must be made as early as possible, and at least three full business days before the start of the meeting.*

BOARD MEETING MATERIALS - *Non-confidential documents or writings for items on this agenda submitted to the Board of Directors after distribution of the Board Packet are available to the public at the same time at the address listed above during regular business hours.*

MEETING RECORDINGS – *Members of the public are hereby notified that meetings of the Board of Directors are recorded. Requests for the audio recordings be directed to the Director of Finance and Administration, Mike Chahal.*

BOARD OF DIRECTORS

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Chris Fischer – Director



FULTON-EL CAMINO RECREATION AND PARK DISTRICT

CONSENT AGENDA ITEM: Minutes 4.1

Thursday, June 18, 2026 | 6:30 p.m.
Richard T. Conzelmann Community Center
2201 Cottage Way, Sacramento, CA 95825

1. CALL TO ORDER / ROLL CALL, 6:30pm

Board Members:

Teresa Higgins, Chair - Present
Michael Seaman, Vice Chair - Present
Kathleen Stricklin, Secretary – Present
Laura Lavallee, Board Director - Present
Chris Fischer, Board Director – Absent

Staff Members:

Emily Ballus, GM
Mike Chahal, Staff
Jaden Delfer, Staff
Jennifer Buckman, District's Counsel

Public Attendees:

Steven Rice, District Resident	Shahiullah Hotak, Volleyball
Dounia Beshara, District Resident	Rama Zariala, Volleyball
David Shaw, District Resident	Mohammad Wafa, Volleyball
Trever Blanc, Security	Reza Gardezi, Volleyball
William Cho, AMRPD	Hasiballah, Volleyball
Wesley Colter, USA Softball	Enagatullah Sedigi, Volleyball
Ahmael Jalal, Volleyball	Ahmad Shinurary, Volleyball

1. PLEDGE OF ALLEGIANCE

2. PUBLIC COMMUNICATIONS: Public comments on anything not on the agenda.

Public Comment:

Wesley Colter – Is requesting for improvements to the outdoor restrooms near the Softball Fields.

Shahiullah – Speaks about Volleyball bringing people together to feel like a community and it's important to him.

David Shaw – Would like to draw attention to parking issues. States the Safe Play Park should not have been built before additional parking was built. Would like to see more than one updated water fountain and says the district should update what it has before adding anything new. Would like to see vehicles impounded.

Dounia Beshara – Would like to draw attention to not having enough parking. Mentions bills for water, as well as lawn and tree maintenance are a burden on the district. Points out with additional recreation programming and courts such as the new volleyball courts we will have more participants in the park, and it will require additional parking.

Chair Teresa Higgins moves agenda item 6.4 to the beginning of the agenda.

4. CONSENT CALENDAR (Motion)

Consent Calendar items are routine and noncontroversial and will be approved by one motion after an opportunity for public comment. Any Board member may request removal of an item for separate consideration.

4.1 Approve Minutes

May 2026 Regular Board and Committee Meetings

4.2 Accept Financial Activity

- a. Summary Financial Statement of Activity YTD May 2026
- b. Receive the Program Revenue and Refund Report for May 2026
- c. Receive Revolving Fund Report for May 2026
- d. Receive the Payroll Report for May 2026
- e. Receive Claims for May 2026
- f. Receive Parks, Recreation, Facility Rentals, and Security Report May 2026

Secretary Kathy Stricklin made the motion to accept the consent agenda and Vice Chair Michael Seaman seconded the motion.

The motion passed with a vote of 4-0-1-0 (Ayes, Noes, Absent, Abstain).

4.3 General Manager's Monthly Update (under separate cover)

5. PRESENTATIONS

5.1 None.

6. DISCUSSION AND ACTION ITEMS (Motion)

The Board will review and discuss taking appropriate action on the following matters:

6.1 Approve and Vote for One Candidate for the 2026 CSDA Board of Directors Election – Term 2027-2029: Seat C-Sierra Network

The Board will authorize the General Manager to vote for the CSDA slate of candidates for the Board Officers election with ballots submitted by July 24, 2026.

Vice Chair Michael Seaman made the motion to vote for candidate Scott Holbrook and Director Laura Lavalée seconded the motion.

The motion passed with a vote of 4-0-1-0 (Ayes, Noes, Absent, Abstain).

6.2 Declaring the Intention to Continue Assessments for Fiscal Year 2026-2027, Preliminarily Approving the Engineer's Reports, and Providing for Notice of Hearing on July 16, 2026, for the Parks Maintenance and Recreation Improvement Assessment Districts (Assessment #1 and Assessment #2)

The Board will consider adopting the assessments #1 and #2 resolutions.

- a. Resolution 2025/26-21 Declaring the Intention to Continue Assessments for Fiscal Year 2026-27, Preliminarily Approving the Engineer's Reports, and Providing for Notice of Hearings on July 18, 2026, for the Parks Maintenance and Recreation Improvement Assessment Districts. (Assessment #1)
- b. Resolution 2025/26-22, Declaring the Intention to Continue Assessments for Fiscal Year 2026-27, Preliminarily Approving the Engineer's Reports, and Providing for Notice of Hearings on July 18, 2026, for the Parks Maintenance and Recreation Improvement Assessment Districts (Assessment #2).

Vice Chair Michael Seaman made the motion to accept the approve resolutions 2025/26-21 and 2025/26-22 and Director Laura Lavallee seconded the motion.

The motion passed with a vote of 4-0-1-0 (Ayes, Noes, Absent, Abstain).

6.3 Preliminary Budget, Fiscal Year 2026/27

The Board will review 2026/27 Fiscal year Preliminary Budget.

- a. Resolution 2025/26-23, Approving the General Fund Preliminary Budget for 2026-27
- b. Resolution 2025/26-24, Approving the Parks Maintenance and Recreation Improvement District (Assessment #1) Preliminary Budget for 2026-27
- c. Resolution 2025/26-25, Approving the Parks Maintenance and Recreation Improvement District (Assessment #2), Preliminary Budget for 2026-27
- d. Resolution 2025/26-26, Approving the Debt Service Fund, Prelim. Budget for 2026-27
- e. Resolution 2025/26-25, Approving the Capital Fund Projects, Prelim. Budget for 2026-27
- f. FECR Preliminary Budget FYE: June 30, 2027

Director Laura Lavallee made the motion to accept the approve the Preliminary Budget, Fiscal Year 2026/27 and Vice Chair Michael Seaman seconded the motion.

The motion passed with a vote of 4-0-1-0 (Ayes, Noes, Absent, Abstain).

6.4 Approval of the Howe Park New Volleyball Court Cost and Location

The Board will consider approving the volleyball court and location I Howe Park.

Public Comment: Mahammad Wafa – shared that the local volleyball community currently utilizes the pickleball courts for volleyball tournaments because the area provides access to lighting for evening play. He expressed enthusiasm for the proposed volleyball courts and noted that the group hopes to expand future tournaments to as many as 32 teams. He also clarified that their tournaments are played on a hard-court surface rather than sand and indicated they are planning to host their next tournament in September.

Board Discussion: Chair Teresa Higgins asked staff about the project timeline and when grant funding would expire. General Manager Emily Ballus responded that the District's grant funding is currently set to expire on December 31, 2026. While an extension may be requested, if necessary, staff intends to complete the project within the existing grant period. Ms. Ballus explained that staff evaluated three potential locations for the volleyball court and that the Facilities Committee has recommended constructing the court adjacent to the existing tennis

courts. She further noted that the total project cost is expected to exceed the available grant funding, with the remaining balance proposed to be funded through Measure Q funds. The Facilities Committee also reviewed the option of resurfacing the existing courts but determined that doing so would not be a cost-effective long-term solution.

Director Laura Lavallee made the motion to approve the Howe Park New Volleyball Court Cost of and Location and Secretary Kathy Stricklin seconded the motion.

The motion passed with a vote of 4-0-1-0 (Ayes, Noes, Absent, Abstain).

7. INFORMATIONAL ITEMS (No Action Required)

7.1 FEC 70th Anniversary Gala Fundraiser on June 27, 2026 in Howe Park

7.2 Bohemian Park Event, June 13, 2026

8. CORRESPONDENCE / ANNOUNCEMENTS

8.1 Letter for U.S. Office of Inspector General, regarding HUD funding

8.2 High-Speed Rail Board Finalizes Plan with Tax Increment Proposal

8.3 A 70th Anniversary Gala Celebration – Flyer

8.4 Dive-Inn Movie Night – Flyer

8.5 FEC Picnic Rentals, Events & Other Special Events – May 2026

9. COMMITTEE REPORTS

Personnel and Finance – Director Lavallee

Met and discussed the preliminary budget. 57% of the yearly budget is a fixed cost. After 33% is taken for Educational Revenue Augmentation Fund (ERAF)

Programs, Facilities, and Projects – Director Seaman

Received surveyor report for Creekside, discussed Measure Q, county bike lane project, and volleyball.

Community Relations – Director Stricklin

Didn't Meet.

10. FUTURE AGENDA ITEMS INITIATED BY DIRECTORS

Director Chris Fischer – No Comment. Absent

Chair Teresa Higgins – Chair Higgins would like to put options for additional parking on the next agenda. You can view fireworks at Seely Park on July 3rd and requests the parking lot not be locked until 10:30pm. Have a security check-in on the next agenda. Attended a concert at the new amphitheater at Fair Oaks Parks and Rec and was blown away.

Vice Chair Michael Seaman – Vice Chair Seaman reported attending a recent CARPD and Chamber of Commerce meetings.

Director Laura Lavallee– No Comment.

Director Kathleen Stricklin – Director Stricklin would like the resiliency center on a future agenda

11. FUTURE AGENDA ITEMS INITIATED BY THE GENERAL MANAGER

General Manager Emily Ballus mentions the Bridge at Cottage Park is installed and completed.

The General Manager also shared that parts for the playground at Babcock Park are in and Twin Rivers will install them.

Jennifer Buckman– OMB Rules on grants. AB 1821 will allow agencies to charge a fee for search and review time on certain requests and suggests tracking public records request.

ADJOURNED TO CLOSED SESSION AT 7:55PM

Returned to Regular Session at 8:05pm

Conference with Labor Negotiators (Gov. Code § 54957.6)

Agency designated representatives: Teresa Higgins, Jennifer Buckman

Unrepresented employee: District Administrator / General Manager

Board requests a small revision to proposed contract requiring General Manager to give a 90-day notice resignation.

12. CALL TO ORDER – REGULAR SESSION

13. REPORT OF ACTION TAKEN IN CLOSED SESSION

13.1 Adopt a Draft Resolution entitled, “A Resolution of the Fulton-El Camino Recreation and Park District approving a Contract of Employment for District Administrator”; and

13.2 Direct District counsel to review the District’s Regular and Contract Salary Schedule to ensure compliance with requirements imposed by California Public Employees Retirement System (CalPERS), and to bring a recommendation to the Board if any changes are made. needed.

Summarized: Contract for Position of General Manager includes in part the following benefits and salary. Salary of \$130,000 annually beginning July 1, 2026 – June 30, 2027. The yearly base salary would be adjusted thereafter to include with cost-of-living increases. The monthly car allowance is in the amount of \$300. Administrative leave will as be provided to other management level employees of the district and all other employee benefits are the same as those provided to other regular- full time district employees with the acceptance that this employee is not entitled to any overtime or commonest story time off benefits do the exempt nature of the position.

Director Laura Lavalée made the motion to accept approving the Resolution of the Fulton-El Camino Recreation and Park District approving a Contract of Employment for District Administrator with the adjustment of adding a 90-day notice resignation and Secretary Kathy Stricklin seconded the motion.

The motion passed with a vote of 4-0-1-0 (Ayes, Noes, Absent, Abstain).

SPECIAL MEETING

DISCUSSION AND DIRECTION ITEMS (Motion or Approval Required)

The Board will review and discuss taking appropriate action on the following matters:

Approve the Contract with Waterworks Aquatic Management to Replace the Howe Park Pond Pump and Fountain System

The Board will consider approving the purchase and installation of the pump and fountain systems at the Howe Park pond to mitigate the current failing system.

Vice Chair Michael Seaman made the motion to approve replacing the floating fountain at the cost of \$64,134.34 and Chair Teresa Higgins seconded the motion.

The motion passed with a vote of 4-0-1-0 (Ayes, Noes, Absent, Abstain).

14. ADJOURNMENT

With no further business, Chair Teresa Higgins adjourned the meeting at 8:29pm

Respectfully submitted by: Mike Chahal, Director of Finance and Administration / Clerk of the Board.

APPROVED: _____

Teresa Higgins, Chair

ATTEST: _____

Kathleen Stricklin, Secretary

FULTON-EL CAMINO RECREATION AND PARK DISTRICT
Summary Statement of Financial Activity - Combined All Funds
YTD June 30, 2026 (Period 12)

	Fund 342A		Fund 396A		Fund 396B		Combined All Funds - 342A, 396A & 396B				Measure Q GO Bond Funds			
	Budget Fund 342A	Actual* Fund 342A	Budget Fund 396A	Actual* Fund 396A	Budget Fund 396B	Actual* Fund 396B	Budget All Funds	Actual* All Funds	Percent of Year	Percent of Budget	Budget Fund 342C	Actual* Fund 342C	Budget Fund 342D	Actual* Fund 342D
Revenues														
Property Taxes / Special Assess.	\$1,915,517	1,866,527	\$474,680	473,053	\$266,903	265,604	\$2,657,100	\$2,605,184	100%	98.0%	-	655,951	-	-
Recreation & Events	237,060	199,423	-	4,095	-	-	237,060	203,518	100%	85.9%	-	-	-	-
Bldg Rental & Other	130,750	101,606	-	-	-	-	130,750	101,606	100%	77.7%	-	-	-	-
Interest Income (Expense)	7,200	(11,101)	-	(2,830)	11,500	1,216	18,700	(12,715)	100%	-68.0%	-	19,227	-	187,936
Measure Q Reimb./Issuance of Debt	11,458	11,205	23,025	22,539	191,705	101,281	226,188	135,025	100%	59.7%	202,494	-	7,552,048	8,027,122
Misc./Water Reimb.	9,500	22,684	50,668	42,319	-	-	60,168	65,003	100%	108.0%	-	148,236	-	-
Total Revenue	\$2,311,485	\$2,190,346	\$548,373	539,175	\$470,108	\$368,101	\$3,329,966	\$3,097,621	100%	93.0%	\$202,494	823,414	7,552,048.00	8,215,058
Expenses														
Salaries & Benefits	\$1,671,845	\$1,607,938	\$43,917	\$50,608	\$123,990	\$128,103	\$1,839,752	\$1,786,649	100%	97.1%	\$0	\$0	\$0	\$0
Services & Suplies	571,019	565,036	503,350	482,172	211,680	175,826	1,286,049	1,223,034	100%	95.1%	-	-	248,886	248,886
Debt Service - Interest	-	-	-	-	25,222	-	25,222	-	100%	0.0%	202,494	202,494	23,873	18,879
Debt Service - Principal	-	-	-	-	64,880	-	64,880	-	100%	0.0%	-	-	839,000	839,000
Total Expenses	\$2,242,864	\$2,172,973	\$547,267	\$532,780	\$425,772	\$303,929	\$3,215,903	\$3,009,682	100%	93.6%	\$202,494	\$202,494	\$1,111,759	\$1,106,765
Income (Loss) from Operations	\$68,621	\$17,372	\$1,106	\$6,395	\$44,336	\$64,172	\$114,063	\$87,939	100%	77.10%	\$0	\$620,920	\$6,440,289	\$7,108,293
Other Revenue /Capital Projects*														
Santa Anita Picnic Shelter Grant	\$0	\$0	\$0	\$0	\$62,000	\$70,297	\$62,000	\$70,297	100%	113.4%	\$0	\$0	\$0	\$0
DW - Outdoor Equity Grant	-	-	-	-	100,000	-	100,000	-	100%	0.0%	-	-	-	-
Howe Park Volleyball Grant	-	-	-	-	100,000	-	100,000	-	100%	0.0%	-	-	-	-
Bohemian Park Design - Prop 68	-	-	-	-	1,000,000	-	1,000,000	-	100%	0.0%	-	-	-	-
Other - PY Transfer & Ins. Pmts.	32,801	32,801	-	-	-	173,799	32,801	206,600	100%	629.9%	-	-	-	-
Total Restricted Rev.	\$32,801	\$32,801	\$0	\$0	\$1,262,000	\$244,096	\$1,294,801	\$276,897	100%	21.4%	\$0	\$0	\$0	\$0
Capital Projects - Rest. Exp.														
Improv Other Than Building	\$0	\$0	\$0	\$0	\$1,000,000	487,785	\$1,000,000	\$487,785	100%	48.8%	\$0	\$0	\$0	\$0
Equipment & Vehicle	-	-	-	-	262,000	-	262,000	-	100%	0.0%	-	-	-	-
Other Misc.	-	-	-	-	32,801	32,801	32,801	32,801	100%	0.0%	-	-	6,440,289	1,319,070
Total Capital Projects	\$0	\$0	\$0	\$0	\$1,294,801	\$520,586	\$1,294,801	\$520,586	100%	40.2%	\$0	\$0	\$6,440,289	\$1,319,070
Net Restricted Revenue /Cap. Proj.	\$32,801	\$32,801	\$0	\$0	(\$32,801)	(\$276,490)	\$0	(\$243,689)	100%	0.0%	\$0	\$0	(\$6,440,289)	(\$1,319,070)
Net Increase (Decrease) in F/B	\$101,422	\$50,173	\$1,106	\$6,395	\$11,535	(\$212,318)	\$114,064	(\$155,750)	100%	-136.5%	\$0	\$620,920	\$0	\$5,789,223

Note: Recreation, Building Rental, and Other Revenues are currently understated due to timing delays in recording transactions in Compass.

FULTON-EL CAMINO RECREATION AND PARK DISTRICT

Budget to Actual

YTD: June 30, 2026 (Period 12)

Fund / Group: General Fund 342A (9349342)

Commitment Item	Budget	Actual-GL	Actual Total	Available	%Consumed
10111000 REGULAR EMPLOYEES	918,655.00	880,778.08	880,778.08	37,876.92	95.88
10112400 COMMITTEE MEMBERS	10,000.00	9,100.00	9,100.00	900.00	91.00
10113200 TIME/ONE HALF OT	0.00	434.55	434.55	(434.55)	
10114300 ALLOWANCES	3,600.00	3,600.00	3,600.00	0.00	100.00
10115200 TERMINAL PAY	0.00	4,935.62	4,935.62	(4,935.62)	
10121000 RETIREMENT	308,871.00	307,938.43	307,938.43	932.57	99.70
10122000 OASDHI	59,515.00	58,523.80	58,523.80	991.20	98.33
10123000 GROUP INS	276,051.00	233,290.54	233,290.54	42,760.46	84.51
10124000 WORK COMP - ACP	91,402.00	106,402.00	106,402.00	(15,000.00)	116.41
10125000 SUI - ACP	3,751.00	2,934.53	2,934.53	816.47	78.23
* 10 - SALARIES AND EMPLOYEE BEN	1,671,845.00	1,607,937.55	1,607,937.55	63,907.45	96.18
20200500 ADVERTISING	31,500.00	47,478.64	47,478.64	(15,978.64)	150.73
20202900 BUS/CONFERENCE EXP	3,550.00	441.29	441.29	3,108.71	12.43
20203100 BUSINESS TRAVEL	6,500.00	1,430.96	1,430.96	5,069.04	22.01
20203500 ED/TRAINING SVC	4,500.00	2,471.29	2,471.29	2,028.71	54.92
20203800 EMPLOYEE RECOGNITION	4,000.00	3,214.91	3,214.91	785.09	80.37
20205100 INS LIABILITY	83,099.00	85,535.00	85,535.00	(2,436.00)	102.93
20206100 MEMBERSHIP DUES	15,300.00	14,125.00	14,125.00	1,175.00	92.32
20207600 OFFICE SUPPLIES	7,500.00	4,994.29	4,994.29	2,505.71	66.59
20208100 POSTAL SVC	6,210.00	41.57	41.57	6,168.43	0.67
20208500 PRINTING SVC	12,600.00	2,424.38	2,424.38	10,175.62	19.24
20211100 BLDG MAINT SVC	5,000.00	6,638.31	6,638.31	(1,638.31)	132.77
20219700 TELEPHONE SVC	10,250.00	12,181.48	12,181.48	(1,931.48)	118.84
20220600 AUTO MAINT SUP	150.00	0.00	0.00	150.00	
20226100 OFFICE EQ MAINT SVC	750.00	173.90	173.90	576.10	23.19
20227500 RENT/LEASE EQ	6,301.00	4,210.48	4,210.48	2,090.52	66.82
20232200 CUSTODIAL SUP	16,500.00	9,071.07	9,071.07	7,428.93	54.98
20250500 ACCOUNTING SVC	12,500.00	15,500.00	15,500.00	(3,000.00)	124.00
20250700 ASSESSMENT COLL SVC	21,000.00	30,803.56	30,803.56	(9,803.56)	146.68
20253100 LEGAL SVC	50,000.00	82,954.50	82,954.50	(32,954.50)	165.91
20255100 PLANNING SVC	27,000.00	26,379.25	26,379.25	620.75	97.70

Fund / Group: General Fund 342A (9349342)

Commitment Item	Budget	Actual-GL	Actual Total	Available	%Consumed
20259100 OTHER PROF SVC	163,023.00	110,389.49	110,389.49	52,633.51	67.71
20281100 DATA PROCESSING SVC	14,450.00	14,863.70	14,863.70	(413.70)	102.86
20281700 ELECTION SVC	2,000.00	0.00	0.00	2,000.00	
20285200 RECREATIONAL SUP	50,260.00	54,310.39	54,310.39	(4,050.39)	108.06
20289800 OTHER OP EXP SUP	11,200.00	30,714.37	30,714.37	(19,514.37)	274.24
20289900 OTHER OP EXP SVC	2,850.00	4,560.27	4,560.27	(1,710.27)	160.01
20291500 COMPASS COSTS	3,026.00	0.00	0.00	3,026.00	
20298703 LND LN CHARGES - ACP	0.00	127.50	127.50	(127.50)	
* 20 - SERVICES AND SUPPLIES	571,019.00	565,035.60	565,035.60	5,983.40	98.95
** Expenditure accounts	2,242,864.00	2,172,973.15	2,172,973.15	69,890.85	96.88
59599101 OPERATI. TRANS IN-PY	0.00	(32,801.00)	(32,801.00)	32,801.00	
* 59 - INTERFUND REIMBRSMNT	0.00	(32,801.00)	(32,801.00)	32,801.00	
** REIMBURSEMENT ACCOUNTS	0.00	(32,801.00)	(32,801.00)	32,801.00	
91910100 PROP TAX CUR SEC	(1,663,378.00)	(1,659,591.32)	(1,659,591.32)	(3,786.68)	99.77
91910200 PROP TAX CUR UNSEC	(62,247.00)	(64,499.63)	(64,499.63)	2,252.63	103.62
91910300 PROP TAX CUR SUP	(36,567.00)	(22,651.09)	(22,651.09)	(13,915.91)	61.94
91910400 PROP TAX SEC DELINQ	(13,472.00)	(21,749.12)	(21,749.12)	8,277.12	161.44
91910500 PROP TAX SUP DELINQ	(4,491.00)	(4,848.16)	(4,848.16)	357.16	107.95
91910600 PROPERTY TAX UNITARY	(29,817.00)	(29,241.21)	(29,241.21)	(575.79)	98.07
91912000 PROP TAX REDEMPTION	(201.00)	(82.89)	(82.89)	(118.11)	41.24
91913000 PROP TAX PR UNSEC	(850.00)	0.00	0.00	(850.00)	
91914000 PROP TAX PENALTIES	(382.00)	(38.40)	(38.40)	(343.60)	10.05
91919600 RDA RESIDUAL	(24,388.00)	(14,678.76)	(14,678.76)	(9,709.24)	60.19
* 91 - TAXES	(1,835,793.00)	(1,817,380.58)	(1,817,380.58)	(18,412.42)	99.00
93931000 VEHICLE CODE FINES	0.00	(3,643.86)	(3,643.86)	3,643.86	
* 93 - FINES, FORFEITURES, AND P	0.00	(3,643.86)	(3,643.86)	3,643.86	
94941000 INTEREST INCOME	(7,200.00)	11,101.00	11,101.00	(18,301.00)	154.18-
94942900 BLDG RENTAL OTHER	(130,750.00)	(101,606.45)	(101,606.45)	(29,143.55)	77.71
* 94 - REVENUE FROM USE OF MONEY	(137,950.00)	(90,505.45)	(90,505.45)	(47,444.55)	65.61
95952200 HOME PROP TAX REL	(11,153.00)	(9,079.36)	(9,079.36)	(2,073.64)	81.41
95953300 REDEV PASSTHRU	(68,571.00)	(40,067.51)	(40,067.51)	(28,503.49)	58.43
95956900 STATE AID OTHER MISC	(32,801.00)	0.00	0.00	(32,801.00)	
* 95 - INTERGOVERNMENTAL REVENU	(112,525.00)	(49,146.87)	(49,146.87)	(63,378.13)	43.68
96964600 RECREATION SVC CHGS	(237,060.00)	(195,779.22)	(195,779.22)	(41,280.78)	82.59
96969700 LAW ENFORCEMENT SVC	(9,500.00)	0.00	0.00	(9,500.00)	
* 96 - CHARGES FOR SERVICES	(246,560.00)	(195,779.22)	(195,779.22)	(50,780.78)	79.40

Fund / Group: General Fund 342A (9349342)

Commitment Item	Budget	Actual-GL	Actual Total	Available	%Consumed
97979000 MISC OTHER	0.00	(22,684.48)	(22,684.48)	22,684.48	
* 97 - MISCELLANEOUS REVENUE	0.00	(22,684.48)	(22,684.48)	22,684.48	
98987000 ISSUANCE OF DEBT	(11,458.00)	(11,205.08)	(11,205.08)	(252.92)	97.79
* 98 - OTHER FINANCING SOURCES	(11,458.00)	(11,205.08)	(11,205.08)	(252.92)	97.79
** REVENUE ACCOUNTS	(2,344,286.00)	(2,190,345.54)	(2,190,345.54)	(153,940.46)	93.43
*** Total	(101,422.00)	(50,173.39)	(50,173.39)	(51,248.61)	49.47

FULTON-EL CAMINO RECREATION AND PARK DISTRICT

Budget to Actual

YTD: June 30, 2026 (Period 12)

Fund / Group: Landscape & Lighting District Fund 396A (9399396)

Commitment Item	Budget	Actual-GL	Actual Total	Available	%Consumed
10111000 REGULAR EMPLOYEES	41,413.00	47,965.91	47,965.91	(6,552.91)	115.82
10121000 RETIREMENT	1,553.00	982.46	982.46	570.54	63.26
10122000 OASDHI	601.00	1,263.61	1,263.61	(662.61)	210.25
10125000 SUI - ACP	350.00	396.05	396.05	(46.05)	113.16
* 10 - SALARIES AND EMPLOYEE BEN	43,917.00	50,608.03	50,608.03	(6,691.03)	115.24
20200500 ADVERTISING	1,200.00	994.75	994.75	205.25	82.90
20203500 ED/TRAINING SVC	600.00	925.36	925.36	(325.36)	154.23
20212200 CHEMICAL SUPPLIES	15,000.00	7,971.69	7,971.69	7,028.31	53.14
20214100 LAND IMP MAINT SVC	37,500.00	28,026.90	28,026.90	9,473.10	74.74
20215100 MECH SYS MAINT SVC	1,000.00	-	-	1,000.00	
20215200 MECH SYS MAINT SUP	1,500.00	2,109.10	2,109.10	(609.10)	140.61
20216700 PLUMBING MAINT SVC	2,000.00	(686.03)	(686.03)	2,686.03	34.30-
20218500 PERMIT CHARGES	5,500.00	4,007.50	4,007.50	1,492.50	72.86
20219100 ELECTRICITY	81,700.00	89,590.61	89,590.61	(7,890.61)	109.66
20219200 NAT GAS/LPG/FUEL OIL	10,500.00	19,002.29	19,002.29	(8,502.29)	180.97
20219300 REF COLL/DISP SVC	33,000.00	22,520.16	22,520.16	10,479.84	68.24
20219500 SEWAGE DISP SVC	10,000.00	10,456.35	10,456.35	(456.35)	104.56
20219800 WATER	211,000.00	204,147.08	204,147.08	6,852.92	96.75
20220500 AUTO MAINT SVC	5,000.00	2,075.28	2,075.28	2,924.72	41.51
20220600 AUTO MAINT SUP	5,000.00	4,132.85	4,132.85	867.15	82.66
20222600 EXPEND TOOLS	4,000.00	2,781.10	2,781.10	1,218.90	69.53
20223600 FUEL/LUBRICANTS	7,500.00	9,400.93	9,400.93	(1,900.93)	125.35
20227500 RENT/LEASE EQ	5,000.00	950.91	950.91	4,049.09	19.02
20229100 OTHER EQ MAINT SVC	2,500.00	1,043.21	1,043.21	1,456.79	41.73
20229200 OTHER EQ MAINT SUP	2,000.00	1,011.38	1,011.38	988.62	50.57
20231400 CLOTH/PERSONAL SUP	7,500.00	6,122.97	6,122.97	1,377.03	81.64
20250700 ASSESSMENT COLL SVC	400.00	287.84	287.84	112.16	71.96
20259100 OTHER PROF SVC	41,500.00	54,874.71	54,874.71	(13,374.71)	132.23
20285200 RECREATIONAL SUP	1,400.00	261.20	261.20	1,138.80	18.66
20289800 OTHER OP EXP SUP	2,500.00	5,369.57	5,369.57	(2,869.57)	214.78
20289900 OTHER OP EXP SVC	8,550.00	4,794.68	4,794.68	3,755.32	56.08

Fund / Group: Landscape & Lighting District Fund 396A (9399396)

Commitment Item	Budget	Actual-GL	Actual Total	Available	%Consumed
* 20 - SERVICES AND SUPPLIES	503,350.00	482,172.39	482,172.39	21,177.61	95.79
** Expenditure accounts	547,267.00	532,780.42	532,780.42	14,486.58	97.35
94941000 INTEREST INCOME	-	2,830.00	2,830.00	(2,830.00)	
* 94 - REVENUE FROM USE OF MONEY	-	2,830.00	2,830.00	(2,830.00)	
96960300 SPECIAL ASSESMENT	(474,680.00)	(473,052.89)	(473,052.89)	(1,627.11)	99.66
96964600 RECREATION SVC CHGS	-	(4,095.00)	(4,095.00)	4,095.00	
* 96 - CHARGES FOR SERVICES	(474,680.00)	(477,147.89)	(477,147.89)	2,467.89	100.52
97970800 WATER RESALE	(50,668.00)	(42,318.58)	(42,318.58)	(8,349.42)	83.52
* 97 - MISCELLANEOUS REVENUE	(50,668.00)	(42,318.58)	(42,318.58)	(8,349.42)	83.52
98987000 ISSUANCE OF DEBT	(23,025.00)	(22,538.61)	(22,538.61)	(486.39)	97.89
* 98 - OTHER FINANCING SOURCES	(23,025.00)	(22,538.61)	(22,538.61)	(486.39)	97.89
** REVENUE ACCOUNTS	(548,373.00)	(539,175.08)	(539,175.08)	(9,197.92)	98.32
*** Total	(1,106.00)	(6,394.66)	(6,394.66)	5,288.66	578.18

FULTON-EL CAMINO RECREATION AND PARK DISTRICT

Budget to Actual

YTD: June 30, 2026 (Period 12)

Fund / Group: Maintenance & Improvement District Fund 396B (9349396)

Commitment Item	Budget	Actual-GL	Actual Total	Available	%Consumed
10111000 REGULAR EMPLOYEES	76,177.00	80,873.78	80,873.78	(4,696.78)	106.17
10113200 TIME/ONE HALF OT	-	146.72	146.72	(146.72)	
10121000 RETIREMENT	6,063.00	4,938.32	4,938.32	1,124.68	81.45
10122000 OASDHI	5,828.00	7,309.65	7,309.65	(1,481.65)	125.42
10123000 GROUP INS	35,770.00	34,722.48	34,722.48	1,047.52	97.07
10125000 SUI - ACP	152.00	112.00	112.00	40.00	73.68
* 10 - SALARIES AND EMPLOYEE BEN	123,990.00	128,102.95	128,102.95	(4,112.95)	103.32
20210300 AGRI/HORT SVC	5,000.00	1,747.68	1,747.68	3,252.32	34.95
20210400 AGRI/HORT SUP	2,000.00	786.73	786.73	1,213.27	39.34
20213100 ELECT MAINT SVC	1,000.00	-	-	1,000.00	
20213200 ELECT MAINT SUP	1,500.00	364.37	364.37	1,135.63	24.29
20214100 LAND IMP MAINT SVC	156,180.00	171,125.00	171,125.00	(14,945.00)	109.57
20214200 LAND IMP MAINT SUP	2,000.00	294.05	294.05	1,705.95	14.70
20215100 MECH SYS MAINT SVC	7,000.00	-	-	7,000.00	
20215200 MECH SYS MAINT SUP	3,500.00	90.48	90.48	3,409.52	2.59
20216200 PAINTING SUP	2,000.00	230.62	230.62	1,769.38	11.53
20216700 PLUMBING MAINT SVC	3,500.00	3,509.30	3,509.30	(9.30)	100.27
20216800 PLUMBING MAINT SUP	5,000.00	4,188.07	4,188.07	811.93	83.76
20229100 OTHER EQ MAINT SVC	8,000.00	1,121.97	1,121.97	6,878.03	14.02
20229200 OTHER EQ MAINT SUP	5,000.00	151.19	151.19	4,848.81	3.02
20259100 OTHER PROF SVC	10,000.00	10,613.16	10,613.16	(613.16)	106.13
20289800 OTHER OP EXP SUP	-	(18,396.99)	(18,396.99)	18,396.99	
* 20 - SERVICES AND SUPPLIES	211,680.00	175,825.63	175,825.63	35,854.37	83.06
30321000 INTEREST EXPENSE	25,222.00	-	-	25,222.00	
30322000 BOND/LOAN REDEMPTION	64,880.00	-	-	64,880.00	
* 30 - OTHER CHARGES	90,102.00	-	-	90,102.00	
42420100 BUILDINGS	1,000,000.00	3,631.74	3,631.74	996,368.26	0.36
42420200 STRUCTURES	294,801.00	484,463.22	484,463.22	(189,662.22)	164.34
* 42 - Buildings	1,294,801.00	488,094.96	488,094.96	806,706.04	37.70
43430300 EQUIP SD NON RECON	-	(309.49)	(309.49)	309.49	
* 43 - Equipment	-	(309.49)	(309.49)	309.49	

Fund / Group: Maintenance & Improvement District Fund 396B (9349396)

Commitment Item	Budget	Actual-GL	Actual Total	Available	%Consumed
50598001 OPERAT. TRANS OUT-PY	-	32,801.00	32,801.00	(32,801.00)	
* 50 - INTERFUND CHARGES	-	32,801.00	32,801.00	(32,801.00)	
** Expenditure accounts	1,720,573.00	824,515.05	824,515.05	896,057.95	47.92
94941000 INTEREST INCOME	(11,500.00)	(1,216.00)	(1,216.00)	(10,284.00)	10.57
* 94 - REVENUE FROM USE OF MONEY	(11,500.00)	(1,216.00)	(1,216.00)	(10,284.00)	10.57
95956900 STATE AID OTHER MISC	(1,262,000.00)	(70,297.44)	(70,297.44)	(1,191,702.56)	5.57
* 95 - INTERGOVERNMENTAL REVENUE	(1,262,000.00)	(70,297.44)	(70,297.44)	(1,191,702.56)	5.57
96960300 SPECIAL ASSESMENT	(266,903.00)	(265,603.71)	(265,603.71)	(1,299.29)	99.51
* 96 - CHARGES FOR SERVICES	(266,903.00)	(265,603.71)	(265,603.71)	(1,299.29)	99.51
97974200 CO INS PREMIUMS	-	(173,798.99)	(173,798.99)	173,798.99	
* 97 - MISCELLANEOUS REVENUE	-	(173,798.99)	(173,798.99)	173,798.99	
98987000 ISSUANCE OF DEBT	(191,705.00)	(101,280.87)	(101,280.87)	(90,424.13)	52.83
* 98 - OTHER FINANCING SOURCES	(191,705.00)	(101,280.87)	(101,280.87)	(90,424.13)	52.83
** REVENUE ACCOUNTS	(1,732,108.00)	(612,197.01)	(612,197.01)	(1,119,910.99)	35.34
*** Total	(11,535.00)	212,318.04	212,318.04	(223,853.04)	1,840.64-

FULTON-EL CAMINO RECREATION AND PARK DISTRICT
PROGRAM REVENUE AND FACILITY REPORT
Month Ending: June 30, 2026

Income Details		June Revenues
Building & Picnic Rental		12042.00
Edison Rental Revenue		
Recreation Fees		42,623.87
Law Enforcement Services		
Vehicle Code Fines (net of pmt to contract agencies)		
Water Resale		
Other Income:		
Expense Reimbursements		
Misc. Income		
Reimbursement for Cal Card Personal Charge	367.54	
US Bank Cal Card Rebate	1186.74	
Total Misc. Income		1,554.28
Total June Revenue		\$56,220.15
YTD May 2026 Revenue		376,803.94
YTD June 2026 Revenue		\$433,024.09
YTD Recap of Revenues		
Income Details		Deposits
Building Rentals		\$93,923.25
Picnic Site Fees		12,539.50
Recreation Fees		216,343.87
Maintenance Services		33,448.96
Grants		61,393.99
Other Income		15,374.52
YTD June 2026 Revenue		\$433,024.09
2026 June Revenue		\$56,220.15
2025 June Revenue		\$220,079.31
2026 June YTD Revenue		\$433,024.09
2025 June YTD Revenue		\$1,399,152.56

FULTON-EL CAMINO RECREATION AND PARK DISTRICT
CLAIMS FOR PROGRAM AND FACILITY REFUNDS
Month Ending: June 30, 2026

REFUND DETAILS			
Prog. No	Program Name	Issued to	Amount
9349342241	Building Rental	El Horgar Community Services	250.00
9349342241	Building Rental	Grady, Taulima	250.00
9349342241	Building Rental	Hafeez, Sima	250.00
9349342241	Building Rental	Malik, Alexa	500.00
9349342241	Building Rental	Nielsen, Lindsey	250.00
9349342241	Building Rental	Safe Credit Union	250.00
9349342241	Building Rental	Siona, Gloria	500.00
9349342241	Building Rental	Alemu, Dereje	250.00
9349342241	Building Rental	Castillo, Seth	250.00
9349342234	Little League	Rai, Bishnu	160.00
9349342242	Picnic Rental	Allen, Tiana	75.00
9349342242	Picnic Rental	Cervantes, Mario	75.00
9349342242	Picnic Rental	Edwards, Daniel	75.00
9349342242	Picnic Rental	Morris, Catlin	75.00
9349342242	Picnic Rental	Traditional Group AA	75.00
9349342242	Picnic Rental	Yemane, Gorge	75.00
9349342321	Summer Camp	Rojas-Meneses, Odalis	205.00
Total Refunds - June 2026			\$3,565.00
RECAP BY PROGRAM			
Prog. No	Program Name	No of Refunds	Amount
2400	Building & Picnic Rentals	16	3,360.00
3503	Adventure Club	1	205.00
Total Refunds - June 2026			\$3,565.00
YTD June 2026 Refunds			\$28,343.17

**FULTON-EL CAMINO RECREATION AND PARK DISTRICT
REVOLVING FUND REPORT - UMPQUA BANK
Month Ending June 30, 2026**

Payee/Vendor	Description	Deposits (Expenses)	Balance
Revolving Ending Balance - June 30,, 2026			\$22,170.38
Deposit	Replenish Funds	\$0.00	
De Lage Landen Fin. Svs.	Copier Lease	(525.07)	
Month of July Net Deposits (Withdrawals)			(525.07)
Ending Balance June 30,, 2026			\$21,645.31
YTD Recap of Deposits / (Withdrawals)			
Payee/Vendor	Description	Amounts	Balance
Revolving Fund Beginning Balance - July 01, 2026			\$25,804.86
Deposit - January 2026	Replenish Funds	21,520.25	
De Lage Landen Fin. Svs.	RICOH Copier Lease	(6,664.82)	
Dozella Graphics	Create Political Postcard	(300.00)	
Drone Photo Services	Drone PICS of Howe Park Bridge	(400.00)	
Sac Door & Gate Corp.	Repair Door Lower Entry Door at 2201 Cottage Way	(17,300.85)	
Green Clean Carpet Cleaning	Clean Hallway Carpet at 2201 Cottage Way	(150.00)	
Maura Jacobs	Cookies for CruiseFest	(155.00)	
Amazon Business Internet	Recreation Supplies	(459.13)	
ABC	Liquor License - Event	(50.00)	
FECRPD - Cash	Aquatics Public Swin - Cash Box	(200.00)	
YTD Net Deposits / (Withdrawals)			(4,159.55)
Ending Balance June 30,, 2026			\$21,645.31

FULTON-EL CAMINO RECREATION AND PARK DISTRICT
PAYROLL REPORT
Month Ending June 1 - 30, 2026.

	<u>June 1 - 15</u>	<u>June 16 - 31</u>	<u>Total June</u>	<u>FYTD June 2026</u>
<u>BOARD</u>				
C. Fischer	\$100.00	-	100.00	
T Higgins	\$100.00	100.00	200.00	
L Lavallee	\$100.00	100.00	200.00	
M Seaman	\$100.00	100.00	200.00	
K Stricklin	\$100.00	100.00	200.00	
TOTAL BOD	\$500.00	\$400.00	\$900.00	\$9,100.00
<u>ADMINISTRATION</u>				
General Manager	\$4,946.93	\$4,946.93	9,893.86	
Chief Financial Officer	3,692.00	3,692.00	7,384.00	
Director of Administration	\$3,189.33	\$3,189.33	6,378.66	
Office Manager	2,315.73	2,315.73	4,631.46	
TOTAL ADMIN.	\$14,143.99	\$14,143.99	\$28,287.98	337,386.12
<u>RECREATION</u>				
Director of Community Enrichment	\$3,189.33	\$3,189.33	\$6,378.66	
Aquatics Manager	\$2,736.07	\$2,736.07	5,472.14	
Park Maintenance II	2,018.46	2,018.46	4,036.92	
Director of Capital Improvements & Safety	3,516.93	3,516.93	7,033.86	
Aquatics	-	309.81	309.81	
Recreation Leader	83.64	104.55	188.19	
Field Supervisor	131.76	318.42	450.18	
Recreation Leader	125.46	156.83	282.29	
Recreation Leader	354.71	89.80	444.51	
Aquatics	649.76	723.12	1,372.88	
Mariam	147.77	-	147.77	
Aquatics	197.56	341.24	538.80	
Recreation Leader	79.68	-	79.68	
Nick	516.35	911.47	1,427.82	
Events/Recreation	-	643.86	643.86	
Aquatics	102.66	239.54	342.20	
Aquatics	588.07	294.04	882.11	
Recreation Leader	113.16	179.17	292.33	
Events	306.10	485.53	791.63	
Aquatics	-	287.36	287.36	
Field Supervisor	153.72	-	153.72	
Recreation Leader	113.16	94.30	207.46	

	<u>June 1 - 15</u>	<u>June 16 - 31</u>	<u>Total June</u>	<u>FYTD June 2026</u>
Aquatics	224.50	502.88	727.38	
Aquatics	547.78	197.56	745.34	
Aquatics	296.34	184.09	480.43	
Aquatics	983.31	1,417.16	2,400.47	
Recreation Leader	587.24	310.24	897.48	
Aquatics	161.64	-	161.64	
Aquatics	616.53	749.31	1,365.84	
Events	57.45	229.80	287.25	
Aquatics	413.08	880.04	1,293.12	
Aquatics	655.54	1,131.48	1,787.02	
Aquatics	161.64	251.44	413.08	
Aquatics	89.80	143.68	233.48	
Aquatics	224.85	263.03	487.88	
Aquatics	363.69	462.47	826.16	
Aquatics	184.96	336.72	521.68	
Aquatics	422.06	839.63	1,261.69	
Aquatics	796.74	564.36	1,361.10	
Aquatics	668.69	398.37	1,067.06	
Aquatics	180.22	341.46	521.68	
Recreation Leader	113.16	-	113.16	
Aquatics	583.32	673.44	1,256.76	
Aquatics	668.69	474.25	1,142.94	
Aquatics	127.28	110.31	237.59	
Recreation Leader	75.44	94.30	169.74	
Aquatics	704.93	188.58	893.51	
Events/Aquatics/RL	663.98	571.63	1,235.61	
Events/Aquatics	89.80	179.60	269.40	
Events	358.87	569.97	928.84	
TOTAL RECREATION	<u>\$26,145.88</u>	<u>\$28,705.63</u>	<u>\$54,851.51</u>	372,928.50
<u>PARK SAFETY</u>				
Director Park Safety	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	
TOTAL PARK SAFETY	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	13,324.66
<u>MAINTENANCE</u>				
Director of Park Operations	\$3,189.33	\$3,189.33	\$6,378.66	
Park Maintenance II	1,921.40	1,921.40	3,842.80	
Park Maintenance II	2,119.00	2,119.00	4,238.00	
Park Maintenance II	1,921.40	1,921.40	3,842.80	
Park Maintenance	729.60	820.80	1,550.40	
Park Maintenance	231.15	221.10	452.25	
Park Maintenance	804.00	904.50	1,708.50	
Park Maintenance	229.80	268.10	497.90	

	June 1 - 15	June 16 - 31	Total June	FYTD June 2026
Park Maintenance	273.60	383.04	656.64	
TOTAL MAINT.	\$11,419.28	\$11,748.67	\$23,167.95	291,148.98
TOTAL SALARIES	\$52,209.15	\$54,998.29	\$107,207.44	\$1,019,299.06
<u>TAXES AND BENEFITS</u>				
Auto Allowance	\$150.00	\$150.00	\$300.00	
Social Security/Medicare	2,918.91	2,953.17	5,872.08	
PARS	635.73	744.09	1,379.82	
State Unemployment Insurance	231.28	289.93	521.21	
Health		26,836.59	26,836.59	
Dental		936.04	936.04	
VSP		184.00	184.00	
Disability Insurance		528.71	528.71	
PERS Retirement		5,675.39	5,675.39	
CalPERS Unfunded Liab.		20,116.50	20,116.50	
CAPRI - Workers Compensation		-	-	
TOTAL TAXES & BENEFITS	\$3,935.92	\$58,414.42	\$62,350.34	\$767,349.47
TOTAL SALARIES & BENEFITS	\$56,145.07	\$113,412.71	\$169,557.78	\$1,786,648.53

FULTON-EI CAMINO RECREATION AND PARK DISTRICT
CLAIMS REPORT
Month Ended June 30, 2026

Fund	Ref. #	Acct. Code	Prog. Code	Code Title and Vendor	Description	Amount	Prog. Total
342A	6-45	20202900	9349342110	US BANK	Zoom - Conferences for board meetings	16.99	73.96
342A	6-45	20202900	9349342110	US BANK	Stenote.AI - Subscription for Board Minutes Transcription	19.99	
342A	6-46	20202900	9349342110	US BANK	Zoom - Conferences for board meetings	16.99	
342A	6-46	20202900	9349342110	US BANK	Stenote.AI - Subscription for Board Minutes Transcription	19.99	
			1100 Total			73.96	
342A	6-45	20202900	9349342210	US BANK	Target - refreshments for public meeting on Measure Q 5.14.2026	46.84	3,933.18
342A	6-45	20203500	9349342210	US BANK	MMANC-Women's Municipal Summit Conference Roseville - Emily	185.00	
342A	6-45	20203500	9349342210	US BANK	MMANC-Women's Municipal Summit Conference Roseville - Dounia	185.00	
342A	6-45	20203500	9349342210	US BANK	MMANC-Women's Municipal Summit Conference Roseville - Maura	185.00	
342A	6-45	20203500	9349342210	US BANK	MMANC-Women's Municipal Summit Conference Roseville - Sabrina	185.00	
342A	6-46	20203500	9349342210	US BANK	Hyatt Regency Monterey - CARPD Conf hotel - Ballus	485.82	
342A	6-46	20203500	9349342210	US BANK	Hyatt Regency Monterey - CARPD Conf hotel - Melinda Michaels-guest volunteer	242.91	
342A	6-46	20203500	9349342210	US BANK	Hyatt Regency Monterey - CARPD Conf hotel - Fisher	485.82	
342A	6-46	20203500	9349342210	US BANK	Hyatt Regency Monterey - CARPD Conf hotel - Higgins	728.73	
342A	6-46	20203500	9349342210	US BANK	Hyatt Regency Monterey - CARPD Conf hotel - Seaman	728.73	
342A	6-45	20203800	9349342210	US BANK	Chipotle Mex - Lunch Meeting	66.81	
342A	6-45	20203800	9349342210	US BANK	Chipotle Mex - Lunch Meeting	69.44	
342A	6-45	20205100	9349342210	US BANK	Home Depot - Cable ties	7.52	
342A	6-45	20206100	9349342210	US BANK	Rotary Dues	275.00	
342A	6-45	20206100	9349342210	US BANK	Safeway - Thank you Flowers for 3 Rotaries for Van donation	55.56	
			2100 Total			3,933.18	
342A	6-2	20203100	9349342230	Beshara, Dounia	May Mileage Reimbursement	49.23	
342A	6-43	20203100	9349342230	Wiederhold, Sabrina	Mileage Reimbursement	68.59	
342A	6-45	20203100	9349342230	US BANK	Sac County Public Garage - Parking	1.75	
342A	6-45	20203100	9349342230	US BANK	Sac County Public Garage - Parking	1.75	
342A	6-45	20203100	9349342230	US BANK	Capital Live Scan - Fingerprinting - Admin 2300	23.00	
342A	6-45	20203100	9349342230	US BANK	Sac County Public Garage - Parking	1.75	
342A	6-45	20203100	9349342230	US BANK	Sac County Public Garage - Parking	1.75	
342A	6-46	20203100	9349342230	US BANK	Sac County Public Garage - Parking	1.75	
342A	6-46	20203100	9349342230	US BANK	Sac County Public Garage - Parking	1.75	
342A	6-46	20203100	9349342230	US BANK	Sac County Public Garage - Parking	1.75	
342A	6-46	20203100	9349342230	US BANK	Sac County Public Garage - Parking	1.75	
342A	6-45	20203500	9349342230	US BANK	MMANC - Training Seminar	185.00	
342A	6-45	20203500	9349342230	US BANK	Depart. ABC Certificate Fee	3.00	
342A	6-45	20203500	9349342230	US BANK	Foodhandler Course	7.95	
342A	6-45	20203500	9349342230	US BANK	State Food Safety Course	12.00	
342A	6-45	20203500	9349342230	US BANK	OSHA- 360Training.com - 30 hour training course	159.99	
342A	6-45	20207600	9349342230	US BANK	BestBuy-Display dock and charger for Mike C	141.35	
342A	6-45	20207600	9349342230	US BANK	Homedepot-Mikes office cable management Supplies	196.11	
342A	6-45	20207600	9349342230	US BANK	Best Buy - Logic keyboard and mouse set	130.49	
342A	6-45	20207600	9349342230	US BANK	OfficeMax/Depot - Laptop stand with cooling pad	51.17	
342A	6-45	20207600	9349342230	US BANK	Office Invisible Tape	12.22	
342A	6-45	20207600	9349342230	US BANK	Amazon - Black metal Storage Cabinet	224.11	

Fund	Ref. #	Acct. Code	Prog. Code	Code Title and Vendor	Description	Amount	Prog. Total
342A	6-45	20207600	9349342230	US BANK	Amazon - Electric Standing Desk	150.84	24,603.17
342A	6-45	20207600	9349342230	US BANK	Amazon - Laminating Pouches	37.62	
342A	6-45	20207600	9349342230	US BANK	Costco - Water	11.98	
342A	6-45	20207600	9349342230	US BANK	Amazon, office shelf & desk	64.64	
342A	6-45	20207600	9349342230	US BANK	Amazon - Tripod for board meetings	54.17	
342A	6-45	20207600	9349342230	US BANK	Amazon - office supplies	9.78	
342A	6-45	20207600	9349342230	US BANK	Amazon - Emily I phone charger	17.23	
342A	6-45	20207600	9349342230	US BANK	HP - Ink Office Supplies	19.38	
342A	6-45	20207600	9349342230	US BANK	Amazon - Chair Wheels Sabrina	15.07	
342A	6-45	20207600	9349342230	US BANK	Amazon - Office Chair Sabrina	96.94	
342A	6-45	20207600	9349342230	US BANK	Adobe - Subscription	10.99	
342A	6-45	20207600	9349342230	US BANK	Adobe - Subscription	29.99	
342A	6-46	20207600	9349342230	US BANK	Costco - Copy Paper	270.82	
342A	6-46	20207600	9349342230	US BANK	Costco - Credit	(10.76)	
342A	6-46	20207600	9349342230	US BANK	Office Depot - Office Coffee	12.99	
342A	6-46	20207600	9349342230	US BANK	Office Depot - Office Coffee	12.99	
342A	6-46	20207600	9349342230	US BANK	Office Depot - Office Coffee (Used a \$10.00 Off Points Credit)	2.29	
342A	6-46	20207600	9349342230	US BANK	HP - Ink Office Supplies	19.38	
342A	6-46	20207600	9349342230	US BANK	Adobe - Subscription	29.99	
342A	6-46	20207600	9349342230	US BANK	Adobe - Subscription	10.99	
342A	6-36	20219700	9349342230	Telelink Business Telephone	Main Office Phone Bill	401.00	
342A	6-45	20219700	9349342230	US BANK	T-Mobile - Monthly cell service	717.72	
342A	6-45	20219700	9349342230	US BANK	AT&T Cottage Center Phone and Internet	155.50	
342A	6-46	20219700	9349342230	US BANK	T-Mobile - Monthly cell service	341.92	
342A	6-46	20219700	9349342230	US BANK	AT&T Cottage Center Phone and Internet	155.50	
342A	6-22	20227500	9349342230	Pitney Bowes	Quarterly Lease	169.59	
342A	6-4	20253100	9349342230	BKS Law Firm	May Sevices Public Records	9,865.00	
342A	6-5	20253100	9349342230	BKS Law Firm	May Services - Measure Q	2,856.07	
342A	6-20	20259100	9349342230	Pacific Shredding	Paper Recycling - May Services	123.20	
342A	6-21	20259100	9349342230	Pacific Shredding	Paper Recycling	61.60	
342A	6-46	20259100	9349342230	US BANK	SurveyMonkey - Annual subscription	300.00	
342A	6-45	20281100	9349342230	US BANK	CHATGPT - Monthly Subscription	20.00	
342A	6-45	20281100	9349342230	US BANK	Adobe Inc. - Monthly pro- subscription for Acrobat Pro.	6.26	
342A	6-45	20281100	9349342230	US BANK	Adobe Inc. - Monthly subscription for Acrobat Pro.	221.92	
342A	6-45	20281100	9349342230	US BANK	Streamline - streamline flex	400.00	
342A	6-45	20281100	9349342230	US BANK	Streamline - Subscription Streamline Flex Mar 1 - Apr 1	420.00	
342A	6-45	20281100	9349342230	US BANK	Streamline - Subscription Streamline Flex Apr 1 - May 1	420.00	
342A	6-46	20281100	9349342230	US BANK	CHATGPT - Monthly Subscription	20.00	
342A	6-46	20281100	9349342230	US BANK	Adobe Inc. - Monthly subscription for Acrobat Pro.	221.92	
342A	6-46	20281100	9349342230	US BANK	Streamline - streamline flex	400.00	
342A	6-46	20281100	9349342230	US BANK	Streamline - Subscription Streamline Flex May 1 - June 1	420.00	
342A	6-7	20289800	9349342230	CINTAS Corp.	First Aid Supplies	26.13	
342A	6-44	20289800	9349342230	Wizix Technology Group Inc.	Copier Meter Charge	921.71	
342A	6-45	20289800	9349342230	US BANK	ITS Intelligent Technical - Monthly Service for IT Support	1,758.24	
342A	6-45	20289800	9349342230	US BANK	ITS Intelligent Technical - Purchasde Laptops for Staff	2,054.36	
			2300 Total			24,603.17	
342A	6-45	20205100	9349342241	US BANK	Event Helper - Rental insurance	134.00	24,603.17
342A	6-45	20205100	9349342241	US BANK	Event Helper - Rental insurance	134.00	

Fund	Ref. #	Acct. Code	Prog. Code	Code Title and Vendor	Description	Amount	Prog. Total
342A	6-46	20205100	9349342241	US BANK	Event Helper - Rental insurance	118.00	2,452.68
342A	6-46	20205100	9349342241	US BANK	Event Helper - Rental insurance	134.00	
342A	6-46	20205100	9349342241	US BANK	Event Helper - Rental insurance	134.00	
342A	6-46	20205100	9349342241	US BANK	Event Helper - Rental insurance	118.00	
342A	6-46	20205100	9349342241	US BANK	Event Helper - Rental insurance	134.00	
342A	6-46	20205100	9349342241	US BANK	Event Helper - Rental insurance	118.00	
342A	6-46	20205100	9349342241	US BANK	Event Helper - Rental insurance	118.00	
342A	6-45	20289800	9349342241	US BANK	Best Buy - Rental Supplies	101.10	
342A	6-45	20289800	9349342241	US BANK	Amazon - Building cleaning supplies	19.63	
342A	6-45	20289800	9349342241	US BANK	Amazon - Building cleaning supplies	16.38	
342A	6-45	20289800	9349342241	US BANK	Home Depot - Return	(15.05)	
342A	6-45	20289800	9349342241	US BANK	Amazon - Building cleaning supplies	32.31	
342A	6-45	20289800	9349342241	US BANK	Home depot - Rental supplies	65.39	
342A	6-45	20289800	9349342241	US BANK	Home Depot - Rental supplies	15.05	
342A	6-45	20289800	9349342241	US BANK	Cheap Signs - Picnic signs	377.35	
342A	6-46	20289800	9349342241	US BANK	Amazon-building cleaning supplies	50.57	
342A	6-46	20289800	9349342241	US BANK	Amazon-building cleaning supplies	101.92	
342A	6-46	20289800	9349342241	US BANK	Amazon - Cleaning supplies	6.54	
342A	6-46	20289800	9349342241	US BANK	Home Depot - Building cleaning supplies	55.49	
342A	6-38	20289900	9349342241	Trident Security Operation	Armed Security Guard Services	484.00	
			2401 Total			2,452.68	
342A	6-46	20285200	9349342243	US BANK	Amazon - Tennis net rentals	216.41	
			2403 Total			216.41	
342A	6-46	20285200	9349342320	US BANK	Dollar Tree - Staff Training Items	34.75	532.41
342A	6-46	20285200	9349342320	US BANK	Amazon - Teen Camp Minute to Win it Supplies	105.22	
342A	6-46	20285200	9349342320	US BANK	Amazon - Teen Camp Supplies, Candy Salad, Outdoor Hiking Blanket	127.56	
342A	6-46	20285200	9349342320	US BANK	Amazon - Teen Camp - Fun Day Boba Cups	148.16	
342A	6-46	20285200	9349342320	US BANK	Amazon - Teen Camp - Fun Day Fruit Boba	24.76	
342A	6-46	20285200	9349342320	US BANK	Amazon - Summer Camp Art and Game Supplies	24.49	
342A	6-46	20285200	9349342320	US BANK	Target - Summer Camp Fun Day - Big Country Breakfast	67.47	
			3200 Total			532.41	
342A	6-45	20285200	9349342334	US BANK	PayPal Wilson Trophy	533.10	
342A	6-45	20285200	9349342334	US BANK	PayPal Wilson Trophy	118.41	
342A	6-45	20285200	9349342334	US BANK	PayPal Wilson Trophy	(30.00)	
342A	6-45	20285200	9349342334	US BANK	Capital Live Scan - Fingerprinting - LL 3304	46.00	
			3304 Total			667.51	667.51
342A	6-45	20285200	9349342340	US BANK	EMIGH HARDWARE- FIELD CHALK AND PAINT FOR ADULT SOFTBALL	187.64	
342A	6-45	20285200	9349342340	US BANK	EMIGH HARDWARE- FIELD CHALK AND PAINT FOR ADULT SOFTBALL	187.65	375.29
						375.29	
342A	6-10	20285200	9349342345	GSSA	Softball Officials	1,532.95	2,385.27
342A	6-11	20285200	9349342345	Gary Fenrich Ent.	Softball Shirts	852.32	
			3405 Total			2,385.27	
342A	6-45	20285200	9349342350	US BANK	Capital Live Scan - Fingerprinting - AQ 3500	92.00	
342A	6-45	20285200	9349342350	US BANK	Amazon, office shelf & desk	107.29	2,385.27
342A	6-45	20285200	9349342350	US BANK	Amazon, digital clock for pool	33.14	
342A	6-45	20285200	9349342350	US BANK	Amazon, first aid box for pool	145.25	
342A	6-46	20285200	9349342350	US BANK	NelsonsCleaning-Cleaning contract for	2,365.00	
342A	6-46	20285200	9349342350	US BANK	Capital Live Scan - Fingerprinting - AQ 3500	92.00	

Fund	Ref. #	Acct. Code	Prog. Code	Code Title and Vendor	Description	Amount	Prog. Total
342A	6-46	20285200	9349342350	US BANK	Capital Live Scan - Fingerprinting - AQ 3500	46.00	2,981.68
			3500 Total			2,981.68	
342A	6-45	20285200	9349342351	US BANK	Home Depot - Pool locks	94.92	
342A	6-45	20285200	9349342351	US BANK	Costco - Fridge Cottage Center	700.36	795.28
			3501 Total			795.28	
342A	6-45	20285200	9349342352	US BANK	Sling, staff scheduling subscription service	51.56	
						51.56	51.56
342A	6-45	20285200	9349342353	US BANK	NelsonCleaning-swim team restroom cleaning contract	1,765.00	
342A	6-45	20285200	9349342353	US BANK	Amazon - Soap Dispensers for Cottage Pool	86.16	4,466.30
342A	6-45	20285200	9349342353	US BANK	Amazon - Soap Dispensers	42.58	
342A	6-45	20285200	9349342353	US BANK	Amazon - Soap for Cottage Pool	51.20	
342A	6-46	20285200	9349342353	US BANK	Signs Now - Swim team & Pool banners	2,521.36	
			3503 Total			4,466.30	
342A	6-45	20285200	9349342354	US BANK	Best Buy - Square Register public swim	864.17	
342A	6-45	20285200	9349342354	US BANK	Canva - Public Swim banners	329.94	
342A	6-45	20285200	9349342354	US BANK	Amazon - Cash Drawer Public Swim	49.51	
342A	6-46	20285200	9349342354	US BANK	Amazon- Paper Towel Dispensers - Public Swim	152.22	
342A	6-46	20285200	9349342354	US BANK	Amazon- Paper Towel Dispensers - Public Swim	(152.22)	
342A	6-46	20285200	9349342354	US BANK	Home Depot- safety supplies for public swim	108.24	1,351.86
						1,351.86	
342A	6-45	20285200	9349342357	US BANK	Costco, food for staff training	43.48	
342A	6-46	20285200	9349342357	US BANK	Amazon, lifeguard umbrellas / first aid supplies	376.37	467.77
342A	6-46	20285200	9349342357	US BANK	Sling, staff scheduling subscription service	47.92	
			3507 Total			467.77	
342A	6-41	20285200	9349342368	Wehrman, Ann	May Gentle Yoga Classes	51.80	51.80
						51.80	
342A	6-45	20285200	9349342369	US BANK	American Red Cross Class Listing	30.00	
342A	6-45	20285200	9349342369	US BANK	Amazon, lifeguard class supplies	147.99	1,252.03
342A	6-45	20285200	9349342369	US BANK	American Red Cross, lifeguard manuals	72.04	
342A	6-45	20285200	9349342369	US BANK	American Red Cross, May 1-3 class completion	432.00	
342A	6-45	20285200	9349342369	US BANK	American Red Cross Class Listing	30.00	
342A	6-46	20285200	9349342369	US BANK	American Red Cross Class Listing	30.00	
342A	6-46	20285200	9349342369	US BANK	American Red Cross Class Listing	30.00	
342A	6-46	20285200	9349342369	US BANK	American Red Cross Lifeguard Recertification, closing out class	480.00	
			3694 Total			1,252.03	
342A	6-46	20285200	9349342370	US BANK	4imprint - giveaways for 70th anniversary	810.85	
			3700 Total			810.85	
342A	6-38	20285200	9349342373	Trident Security Operation	Armed Security Guard Services	656.00	810.85
342A	6-45	20285200	9349342373	US BANK	CA ABC - training course	3.00	
342A	6-45	20285200	9349342373	US BANK	www.aaafoodhandler.com -	7.95	
342A	6-45	20285200	9349342373	US BANK	Bluehost - Web hosting service for website	36.87	
342A	6-45	20285200	9349342373	US BANK	Signs now - Music in the Park Banner	224.12	
342A	6-45	20285200	9349342373	US BANK	Amazon - Music in the Park event supplies	72.12	
342A	6-45	20285200	9349342373	US BANK	Amazon - Music in the Park event supplies	126.74	
342A	6-45	20285200	9349342373	US BANK	Amazon - Music in the Park blankets	299.60	
342A	6-45	20285200	9349342373	US BANK	Amazon - Music in the Park sunscreen	71.66	
342A	6-45	20285200	9349342373	US BANK	Racing Products WareHouse - Tognotti's Music in the Park	225.00	
342A	6-45	20285200	9349342373	US BANK	Harbor Frieght - pop ups Music in the Park		

Fund	Ref. #	Acct. Code	Prog. Code	Code Title and Vendor	Description	Amount	Prog. Total
342A	6-45	20285200	9349342373	US BANK	Signs Now - Music in the Park Signs	1,667.57	7,568.85
342A	6-45	20285200	9349342373	US BANK	Dirty Dawgs - Music in the Park	13.06	
342A	6-45	20285200	9349342373	US BANK	Gameday Grill- Music in the Park	18.49	
342A	6-45	20285200	9349342373	US BANK	Gameday Grill- Music in the Park	10.79	
342A	6-45	20285200	9349342373	US BANK	Gameday Grill- Music in the Park	16.26	
342A	6-45	20285200	9349342373	US BANK	Costco - Music in the Park event supplies	466.25	
342A	6-45	20285200	9349342373	US BANK	Costco - Music in the Park event supplies	128.69	
342A	6-45	20285200	9349342373	US BANK	Sacto MoFo - Food truck services Music in the Park	1,310.50	
342A	6-45	20285200	9349342373	US BANK	Honey Bucket - Porta Johns Music in the Park	735.52	
342A	6-46	20285200	9349342373	US BANK	Facebook Promotion - Party in the Park gala event	190.50	
342A	6-46	20285200	9349342373	US BANK	Facebook Promotion - Music in the Park	102.00	
342A	6-46	20285200	9349342373	US BANK	Hannibals Catering Deposit - Party in the Park gala event	500.00	
342A	6-46	20285200	9349342373	US BANK	Facebook Promotion - Party in the Park gala event	9.93	
342A	6-46	20285200	9349342373	US BANK	Signs Now - Party in the Park gala event signs	444.95	
342A	6-46	20285200	9349342373	US BANK	Facebook Promotion - Party in the Park gala event	102.00	
			3703 Total			7,568.85	
342A	6-46	20285200	9349342374	US BANK	Target - Posterboard for yard sale	5.93	35.88
342A	6-46	20285200	9349342374	US BANK	Garagesalefinder.com - yard sale Promotion	29.95	
			3715 Total			35.88	
342A	6-45	20285200	9349342376	US BANK	1/2 fee for Killer Duelign Pianos for Gala Dinner 6.27.2026	1,820.00	5,195.59
342A	6-45	20285200	9349342376	US BANK	HomeDepot-Concert beer garden fencing	277.54	
342A	6-45	20285200	9349342376	US BANK	GAMEDAY FOOD TRUCK- FOOD FOR MUSIC IN THE PARK	37.89	
342A	6-45	20285200	9349342376	US BANK	FPS - Bounce House Rental for Music in the Park	3,006.40	
342A	6-45	20285200	9349342376	US BANK	Costco- Ice for 70th Park Event	53.76	
			3706 Total			5,195.59	
342A	6-26	20200500	9349342390	Print Project Manager Inc.	Postcard Mailer	7,158.20	7,378.20
342A	6-45	20285200	9349342390	US BANK	Shutter Stock - Subscription	29.00	
342A	6-45	20285200	9349342390	US BANK	Open Ai - Subscription	20.00	
342A	6-45	20285200	9349342390	US BANK	Shutter Stock - Subscription	7.00	
342A	6-46	20285200	9349342390	US BANK	Shutter Stock - Subscription	29.00	
342A	6-46	20285200	9349342390	US BANK	Open Ai - Subscription	20.00	
342A	6-46	20285200	9349342390	US BANK	Vimeo Subscription	108.00	
342A	6-46	20285200	9349342390	US BANK	Shutter Stock - Subscription	7.00	
			3900 Total			7,378.20	
342A	6-45	20203100	9349342420	US BANK	OpenAI-computing subscription	20.00	40.00
342A	6-46	20203100	9349342420	US BANK	OpenAI-Computing subscription	20.00	
			4200 Total			40.00	
342A	6-45	20211100	9349342430	US BANK	J AND J LOCKSMITHS-COPIES OF KEYS FOR BUILDINGS	17.93	40.00
342A	6-45	20211100	9349342430	US BANK	J AND J LOCKSMITHS- COPIES OF BUILDING KEYS	3.36	
342A	6-45	20211100	9349342430	US BANK	J AND J LOCKSMITHS- KEY COPIES	13.45	
342A	6-45	20211100	9349342430	US BANK	J AND J LOCKSMITHS- COPIES OF PUMPROOM KEY	13.45	
342A	6-46	20211100	9349342430	US BANK	Home Depot- Fly Trap Paper for the Office	2.41	
342A	6-39	20211200	9349342430	Trenchless Company	Toilet Stoppage with Auger	198.00	
342A	6-45	20232200	9349342430	US BANK	Walkers-Toilet Paper	889.36	
342A	6-45	20232200	9349342430	US BANK	Walkers-Toilet Paper	603.13	
342A	6-45	20232200	9349342430	US BANK	homeDepot-Seely restroom sink drain kit	21.38	
342A	6-45	20232200	9349342430	US BANK	statechemical-floor cleaner and air freshener	583.68	
342A	6-45	20232200	9349342430	US BANK	FERGUSON- URINALL REBUILD KIT		

Fund	Ref. #	Acct. Code	Prog. Code	Code Title and Vendor	Description	Amount	Prog. Total
342A	6-46	20232200	9349342430	US BANK	WalkersSupply-Toilet paper order	1,206.26	4,671.89
342A	6-46	20232200	9349342430	US BANK	StateChemical-Custodian Chems	420.32	
342A	6-46	20232200	9349342430	US BANK	HOME DEPOT- CLEANING SUPPLIES FOR SHOP	8.58	
342A	6-46	20232200	9349342430	US BANK	HOME DEPOT- BATHROOM SUPPLIES TO FIX TOILET	20.42	
342A	6-46	20232200	9349342430	US BANK	HOME DEPOT- SUPPLIES TO FIX DOORS	15.34	
342A	6-45	20259100	9349342430	US BANK	Sequoia Monitoring Service - Building alarm service quarterly invoice	255.00	
342A	6-46	20259100	9349342430	US BANK	J&J-lockbox for keys	69.48	
342A	6-46	20259100	9349342430	US BANK	J. Smith & Sons -	59.00	
			4300 Total			4,671.89	
342A	6-6	20205100	9349342440	CAPRI	EPLI Deductible	5,000.00	16,621.67
342A	6-3	20253100	9349342440	BKS Law Firm	May Sevices	532.50	
342A	6-1	20259100	9349342440	Airborne Security Patrol, Inc.	Security Lock-up - May Services	4,926.60	
342A	6-27	20259100	9349342440	Sacramento County Sheriff	Off Duty Program	2,796.57	
342A	6-37	20259100	9349342440	Trident Security Operation	Armed Security Guard Services	2,750.00	
342A	6-38	20259100	9349342440	Trident Security Operation	Armed Security Guard Services	616.00	
			4400 Total			16,621.67	
Fund 342A: June 2026 Claims						88,981.09	88,981.09
Fund	Ref. #	Acct. Code	Prog. Code	Code Title and Vendor	Description	Amount	Prog. Total
396A	6-8	20214100	9399396420	Services	Creekside Trail	1,765.00	9,648.61
396A	6-45	20214100	9399396420	US BANK	Capitpal Rubber-discharge hose for seely drains	477.76	
396A	6-45	20214100	9399396420	US BANK	Homedepot-Lumber to board off damaged bridge at cottage park	110.49	
396A	6-45	20214100	9399396420	US BANK	EmighAcehardware-Pond filter gasket glue	16.79	
396A	6-45	20214100	9399396420	US BANK	hedmanwell-turbine inspection for santa anita park	386.48	
396A	6-45	20214100	9399396420	US BANK	HOME DEPOT- SUPPLIES TO PUMP OUT SEELY PARK	509.88	
396A	6-45	20214100	9399396420	US BANK	HOME DEPOT- SUPPLIES TO PUMP OUT SEELY PARK	124.91	
396A	6-46	20214100	9399396420	US BANK	JMZSteel-Metal for pool fence door closers	115.80	
396A	6-46	20214100	9399396420	US BANK	HomeDepot-Door closers for pool fence (County Compliance)	458.95	
396A	6-46	20214100	9399396420	US BANK	BLISS POWER- ELECTRIC CHAINSAW FOR TREE WORK	336.14	
396A	6-46	20214100	9399396420	US BANK	J AND J LOCKSMITHS- PADLOCKS FOR BACKFLOW	41.30	
396A	6-45	20216700	9399396420	US BANK	Ferguson-Cottage building flush valve	228.20	
396A	6-45	20216700	9399396420	US BANK	Ferguson-Cottage urinal spud and Vbtube	127.18	
396A	6-46	20216700	9399396420	US BANK	SprinklerS&S- Irrigation Parts montly invoice	976.54	
396A	6-46	20216700	9399396420	US BANK	TheTrenchlessCO- drain clearing on D/O	198.00	
396A	6-29	20219100	9399396420	SMUD	Collective Electric Bill - May	3,764.06	
396A	6-30	20219100	9399396420	SMUD	Electric Bill - Street Lights	1,195.82	
396A	6-31	20219100	9399396420	SMUD	Collective Electric Bill - Jun (5/1 - 6/1/2026)	4,650.27	
396A	6-33	20219100	9399396420	SMUD	Electric Bill - Street Lights (5/22 - 6/22/2026)	1,195.82	
396A	6-23	20219200	9399396420	PG&E	Gas Bill - Hall (Kitchen)	8.11	
396A	6-24	20219200	9399396420	PG&E	Gas Bill - Corp Yard	12.98	
396A	6-45	20219300	9399396420	US BANK	Republic Service Trash - Monthly Trash, Recycle and Organic Services at 3097 Cottage	493.76	
396A	6-45	20219300	9399396420	US BANK	Republic Services- Monthly trash, recycle and organic Services at 2201 Cottage Way	1,331.99	
396A	6-45	20219300	9399396420	US BANK	Republic Service Trash - Monthly Trash, Recycle and Organic Services at 3097 Cottage	493.76	
396A	6-45	20219300	9399396420	US BANK	Republic Services- Monthly trash, recycle and organic Services at 2201 Cottage Way	1,769.77	
396A	6-34	20219800	9399396420	SSWD	Water Bill 036514 - Cottage Park	9,648.61	

Fund	Ref. #	Acct. Code	Prog. Code	Code Title and Vendor	Description	Amount	Prog. Total
396A	6-34	20219800	9399396420	SSWD	Water Bill 036516 - Howe Park	8,459.90	
396A	6-34	20219800	9399396420	SSWD	Water Bill 046262-00 - Seely Park	1,368.95	
396A	6-34	20219800	9399396420	SSWD	Water Bill 46263-00 - Bellview Park	1,773.10	
396A	6-34	20219800	9399396420	SSWD	Water Bill 046267-00 - Santa Anita	1,296.20	
396A	6-34	20219800	9399396420	SSWD	Water Bill 046271-00 - Bohemian Park	3,332.28	
396A	6-45	20220500	9399396420	US BANK	Amazon-Ferrule crimper and sound deadening mat (Returned)	132.34	
396A	6-45	20220500	9399396420	US BANK	Amazon-Ferrule crimper and sound deadening mat (Returned)	(132.34)	
396A	6-45	20220500	9399396420	US BANK	Oreilly-dodge air filter	22.07	
396A	6-46	20220500	9399396420	US BANK	JiffyLube-Dodge oil change	206.45	
396A	6-46	20220500	9399396420	US BANK	Tognottis (RPW)- 20W oil for shop	69.98	
396A	6-46	20220500	9399396420	US BANK	O'REILLY AUTO- BRAKE LIGHT BULBS FOR WHITE VAN	10.76	
396A	6-46	20220500	9399396420	US BANK	JIFFYLUBE- OIL CHANGE FOR F150 TRUCK	86.77	
396A	6-46	20220500	9399396420	US BANK	Radial Tire Service - Flat Repair on Ford F-150	30.00	
396A	6-46	20220600	9399396420	US BANK	Oreilly-Waste jug for liquids	10.76	
396A	6-46	20220600	9399396420	US BANK	Oreilly-Wix filter for Gator	12.98	
396A	6-45	20222600	9399396420	US BANK	HOJE DEPOT-TOOLS FOR FIELD USE	73.17	
396A	6-45	20222600	9399396420	US BANK	HOME DEPOT- EXPENDABLE TOOLS	142.17	
396A	6-45	20222600	9399396420	US BANK	Primo Water - Water monthly service	86.83	
396A	6-46	20222600	9399396420	US BANK	HOME DEPOT- EXPENDABLE TOOLS	41.37	
396A	6-45	20223600	9399396420	US BANK	Fast&easymarket-Fuel for dodge	162.39	
396A	6-45	20223600	9399396420	US BANK	Shell-Fuel for dodge	175.00	
396A	6-45	20223600	9399396420	US BANK	AMPM- FUELO FOR F150	76.68	
396A	6-45	20223600	9399396420	US BANK	ARCO- FUEL FOR TAHOE	94.97	
396A	6-45	20223600	9399396420	US BANK	ARCO- FUEL FOR F150	105.51	
396A	6-45	20223600	9399396420	US BANK	ARCO- FUEL FOR F150	84.34	
396A	6-45	20223600	9399396420	US BANK	ARCO- FUEL FOR F150	113.13	
396A	6-46	20223600	9399396420	US BANK	76-Fuel for dodge	140.00	
396A	6-46	20223600	9399396420	US BANK	76-Fuel for dodge	145.42	
396A	6-46	20223600	9399396420	US BANK	76-Fuel for dodge	119.42	
396A	6-46	20223600	9399396420	US BANK	76-Fuel for dodge	144.82	
396A	6-46	20223600	9399396420	US BANK	76-Fuel for dodge	127.71	
396A	6-46	20223600	9399396420	US BANK	AMPM- GAS FOR F150	79.38	
396A	6-46	20223600	9399396420	US BANK	AMPM-FUEL FOR TAHOE	113.86	
396A	6-46	20223600	9399396420	US BANK	CHEVRON- FUEL FOR JERRY JUGS	84.77	
396A	6-46	20223600	9399396420	US BANK	ARCO-FUEL FOR TAHOE	81.20	
396A	6-46	20223600	9399396420	US BANK	ARCO- FUEL FOR F150	110.88	
396A	6-46	20223600	9399396420	US BANK	ARCO- FUEL FOR TAHOE	20.02	
396A	6-46	20223600	9399396420	US BANK	ARCO- FUEL FOR F150	60.00	
396A	6-45	20229200	9399396420	US BANK	oreilly-Grease gun & grease for new equipment	51.27	
396A	6-46	20229200	9399396420	US BANK	HarborFreight-Jack stands for equipments	159.10	
396A	6-46	20229200	9399396420	US BANK	HOME DEPOT-SCREWS FOR PARK PROJECTS	16.76	
396A	6-45	20231400	9399396420	US BANK	Vestis-Uniform Service	473.56	
396A	6-46	20231400	9399396420	US BANK	Vestis-Uniform service	474.73	
396A	6-46	20231400	9399396420	US BANK	AMAZON- TRASH PICKERS FOR CREW	101.19	
396A	6-46	20231400	9399396420	US BANK	AMAZON- UTLITY KNIFE FOR IRRIGATION	43.09	
396A	6-45	20259100	9399396420	US BANK	Animal Damage Management - Monthly animal control services (i.e. gopher, squirrel, etc)	325.00	

Fund	Ref. #	Acct. Code	Prog. Code	Code Title and Vendor	Description	Amount	Prog. Total
396A	6-45	20259100	9399396420	US BANK	Millennium Termite & Pest - Monthly pest control service Service at 2201 Cottage Way	95.00	46,550.27
396A	6-45	20259100	9399396420	US BANK	Millennium Termite & Pest - Bi-Monthly pest control service Service at 3097 Cottage Way	99.00	
396A	6-45	20259100	9399396420	US BANK	Millennium Termite & Pest - Sentricon monthly Service at 2201 Cottage Way	41.00	
396A	6-45	20259100	9399396420	US BANK	Millennium Termite & Pest - Sentricon monthly Service at 2201 Cottage Way	57.00	
396A	6-45	20259100	9399396420	US BANK	Millennium Termite & Pest - Sentricon monthly Service at 3097 Cottage Way	51.00	
396A	6-46	20259100	9399396420	US BANK	Animal Damage Management - Monthly animal control services (i.e. gopher, squirrel, etc)	125.00	
396A	6-46	20289900	9399396420	US BANK	PrimoWater-Water delivery for maint.	136.04	
			4200 Total			46,550.27	
396A	6-45	20212200	9399396450	US BANK	KellerSupply-Pool chemicals	1,399.51	
396A	6-45	20212200	9399396450	US BANK	LESLIE'S POOL SUPPLY-CHEMICALS FOR POOL	379.18	
396A	6-46	20212200	9399396450	US BANK	HOME DEPOT-CHEMICALS FOR POOL	172.18	
396A	6-46	20212200	9399396450	US BANK	LESLIE POOL SUPPLIES- TESTING CHEMICALS FOR POOL WATER	32.31	
396A	6-46	20212200	9399396450	US BANK	KELLER SUPPLY- CHEMICALS FOR POOL	41.18	
396A	6-46	20212200	9399396450	US BANK	LESLIE POOL SUPPLY- CHEMICALS FOR POOL	64.61	
396A	6-46	20212200	9399396450	US BANK	LESLIES POOL SUPPLY- CHLORINE FOR POOL	68.92	
396A	6-45	20215200	9399396450	US BANK	HomeDepot-Pool lighting screws	34.35	
396A	6-45	20215200	9399396450	US BANK	Homedepot-Pump room lights and cable ties	55.97	
396A	6-45	20215200	9399396450	US BANK	HOME DEPOT- SCREWS FOR POOL LIGHTS	5.08	
396A	6-45	20215200	9399396450	US BANK	HOME DEPOT- SUPPLIES TO SERVICE MECHANICAL SYSTEMS	41.95	
396A	6-46	20215200	9399396450	US BANK	Amazon-Pond filter O-ring material	75.41	
396A	6-46	20215200	9399396450	US BANK	EmighAce-Primer and paint for pool fencing	43.06	
396A	6-45	20218500	9399396450	US BANK	EVQ-Permit late fee on pool furnace report	75.00	
396A	6-28	20219100	9399396450	SMUD	Electric Bill - Pool	1,937.47	8,986.57
396A	6-32	20219100	9399396450	SMUD	Electric Bill - Pool (5/2/ - 6/2/2026)	2,294.08	
396A	6-25	20219200	9399396450	PG&E	Gas Bill - Pool	420.03	
396A	6-45	20231400	9399396450	US BANK	BIG 5 SPORTING GOODS- EQUIPMENT TO DIVE AND REINSERT POOL LIGHT	84.03	
396A	6-15	20259100	9399396450	Indermill Aquatics	Howe Pond Maintenance - May	575.00	
396A	6-16	20259100	9399396450	Indermill Aquatics	Howe Pond Maintenance - Jun	575.00	
396A	6-45	20285200	9399396450	US BANK	HOME DEPOT- SUPPLIES TO HANG FIRST AID KIT AT POOL IN LIFEGUARD ROOM	14.99	
396A	6-46	20285200	9399396450	US BANK	ULTIMATE POOL TOOLS- NEW HANDLE FOR VACUUM AND POOL BRUSH	478.86	
396A	6-46	20285200	9399396450	US BANK	CYCLE GEAR- MEASURING CUPS FOR CHEMICALS AT POOL	15.20	
396A	6-45	20289900	9399396450	US BANK	EmighAcehardware-Pool filter ball valves	49.40	
396A	6-46	20289900	9399396450	US BANK	HOME DEPOT- SUPPLIOES TO FIX OUTLET AT POOL	34.44	
396A	6-46	20289900	9399396450	US BANK	HOME DEPOT- SQUEEGEE FOR POOLL DECK	19.36	
			4500 Total			8,986.57	
396A	6-35	20219800	9399396460	SSWD	Water Bill 036678 (2332 Edison)	120.20	229.20
396A	6-46	20259100	9399396460	US BANK	Millennium Termite & Pest - Bi-Monthly pest control service at 2328 Edision Avenue	109.00	
			4600 Total			229.20	
Fund 396A: June 2026 Claims						55,766.04	55,766.04
Fund	Ref. #	Acct. Code	Prog. Code	Code Title and Vendor	Description	Amount	Prog. Total
396B	6-46	20210400	9349396420	US BANK	HOM DEPOT-LANDSCAPING SUPPLIES	40.88	14,437.66
396B	6-8	20214100	9349396420	Emerald Green Landscape Ser.	Landscape Maintenance	14,375.00	
396B	6-46	20214200	9349396420	US BANK	HOME DEPOT- SUPPLIES FOR HOWE SIGNS	21.78	
			4200 Total			14,437.66	
396B	6-17	42420200	9349396520	Kelley, Janice	Outdoor Equity Specialist	2,500.00	

Fund	Ref. #	Acct. Code	Prog. Code	Code Title and Vendor	Description	Amount	Prog. Total
			4500 Total			2,600.00	2,600.00
Fund 396B: June 2026 Claims						17,037.66	17,037.66
Fund	Ref. #	Acct. Code	Prog. Code	Code Title and Vendor	Description	Amount	Prog. Total
342D	6-9	42420200	9349355000	Emerald Green Landscape Ser.	Edison Weed Abatement	6,875.00	262,348.35
342D	6-12	42420200	9349355000	Heritage Pool Supply Group	Drain Covers, Chemical Tubing	3,779.78	
342D	6-13	42420200	9349355000	Heritage Pool Supply Group	Chemical Feed Pump, Controller Configuration	5,238.54	
342D	6-14	42420200	9349355000	ICS	Strategic Communications - Logo	1,500.00	
342D	6-18	42420200	9349355000	Magna Kote Electrostatic Painting Ir	Electrostatic Painting Cottage Pool	5,450.00	
342D	6-19	42420200	9349355000	Melton Design Group (MDG)	Park Upgrade	26,785.50	
342D	6-40	42420200	9349355000	Trenchless Company	Howe Building Sewer Repair	9,842.61	
342D	6-42	42420200	9349355000	Westcon Construction Corp	Cottage Park Bridge Repair	192,472.00	
342D	6-45	42420200	9349355000	US Bank	Signs Now-Safe Play Park signs	234.18	
342D	6-45	42420200	9349355000	US Bank	Signs Now-Safe Play Park signs	216.85	
342D	6-45	42420200	9349355000	US BANK	Homedepot-Safeplay playground sign poles	86.14	
342D	6-45	42420200	9349355000	US BANK	KELLER SUPPLY CO.-TECHNICIAN PERFORMED SERVICE ON MULTI-PORT VALVE	1,517.31	
342D	6-45	42420200	9349355000	US BANK	ITS Intelligent Technical - Replace Network Switch related to new Server	2,261.51	
342D	6-45	42420200	9349355000	US BANK	Cascade Rock- Granite Boulder Delivery and Placement for North Prking Lot	931.55	
342D	6-45	42420200	9349355000	US BANK	Metro Fire& Security- Knox Locks for Parking Lots, Bellview, Cottage, Howe, Seely	1,072.08	
342D	6-46	42420200	9349355000	US BANK	JMZSteel- SAFEPLAY PLAYGROUND Sign Supports	141.35	
342D	6-46	42420200	9349355000	US BANK	Grainger-Faucet upgrade in womens Bathroom @ D/O (Past due Invoice from March)	1,381.28	
342D	6-46	42420200	9349355000	US BANK	AQUAFINITY- CHEMICAL CONTROLLER FOR POOL	1,762.61	
342D	6-46	42420200	9349355000	US BANK	AQUAFINITY- ACID PUMP AND HOSES FOR POOL	800.06	
			5000 Total			262,348.35	262,348.35
Fund 342D: June 2026 Claims						262,348.35	262,348.35
Combined Total June 2026 Total Services & Supplies Claims (excluding Payroll & Refunds)							424,133.14
Teresa Higgins, Chair Board of Directors				Kathleen Stricklin, Secretary			

FULTON-EL CAMINO RECREATION AND PARK DISTRICT

MEMORANDUM

TO: Board of Directors

FROM: Jaden Delfer, Robin Romines, Sabrina Wiederhold, and David Price

SUBJECT: Activity Report for June 2026

DATE: July 16, 2026

RECREATION ACTIVITY REPORT

June 2026 Recreation Report

Hard Court Volleyball: The courts are currently being used for open play. Court rentals are available, subject to weather conditions. Afghan volleyball rentals have continued through June.

Sand Volleyball: XOSO's Spring Monday, Tuesday, and Wednesday sand volleyball leagues concluded in June. Summer league play began in late June with Monday and Wednesday leagues, while the Wednesday evening league is scheduled to begin in early July. The Howe Park sand volleyball courts continue to be in high demand as there are limited lighted sand court opportunities in the Sacramento area. Court rentals are available, subject to weather conditions.

Futsal/Soccer: The courts are currently being used for open play and rentals when requested.

Adult Softball: The FEC Adult Summer Softball Recovery League began at the end of June and will run through August. The XOSO Late Spring League, which continued play throughout June, is scheduled to conclude in early July. The XOSO Summer Thursday Night League will commence in late July. In June, the FEC Senior Softball team hosted one home game as part of the SVSSL season schedule. The Sac Pride Leagues completed their season at Howe Park in June, following the completion of lighting repairs at the Sacramento Complex. Please note that field rentals remain available, weather permitting.

Basketball: The Late Spring XOSO leagues began in May and continued through June, with games held on Mondays and Thursdays. The XOSO Summer leagues for both Monday and Thursday nights are set to begin in July. Court rentals remain available, weather permitting.

Pickle Ball: The XOSO Tuesday and Thursday late spring leagues concluded in June. XOSO Tuesday and Thursday Summer leagues also kicked off in June. Court rentals are available, subject to weather conditions.

Little League:

The 2026 Little League season has officially concluded. TeamSnap will remain active throughout the summer, allowing families to stay connected, organize informal practices and games, and receive information regarding fall registration opportunities and league announcements. Staff are reviewing the season, gathering feedback, and evaluating opportunities to continue improving the program for next year. Preparations for the 2027 season, including planning and volunteer recruitment, will begin later this summer.

Senior Lounge:

The Senior Lounge continues to meet on Tuesdays from 1:00–3:00 p.m. The program provides a welcoming space for older adults to gather for cards, games, conversation, and social interaction. Staff continue to explore opportunities to expand the variety of self-led interest groups and activities, encouraging participants to share hobbies, skills, and ideas that can help the program continue to grow and evolve while fostering meaningful connections within the community.

Senior Walking Group:

The Senior Walking Group continues to meet three times each week: Monday & Thursday at 8:30 a.m. and Saturday at 8:00 a.m.

Participants enjoy walking together at a comfortable pace while staying active and connecting with others. The program encourages healthy lifestyles through regular physical activity while providing an enjoyable social outlet in a supportive environment.

Adult & Senior Table Tennis:

Adult & Senior Table Tennis continues to meet every Tuesday at 10:00 a.m. at the Howe Community Center. The program is offered as a \$2 drop-in activity and welcomes players of all skill levels, from beginners to experienced participants. The weekly sessions provide an enjoyable opportunity for recreation, friendly competition, and social engagement.

Yoga Contract Classes:

Contract Yoga classes continue to meet Sundays at 12:30 p.m. The class offers participants an opportunity to improve flexibility, balance, strength, and overall wellness through guided instruction. The program remains a valued wellness offering for residents seeking low-impact fitness and stress reduction.

Adventure Club & Teen Summer Camps:

Adventure Club and Teen Summer Camp launched successfully in June, welcoming participants for another exciting summer season. Campers are participating in weekly themed activities that include arts and crafts, STEM projects, team-building games, swimming, field trips, outdoor recreation, and community engagement experiences. This year's Teen Camp also features expanded media, leadership, and creative programming designed to encourage independence, teamwork, and problem-solving. Staff continue to focus on providing a safe, engaging, and

memorable summer experience while creating opportunities for campers to build friendships, develop new skills, and explore a variety of recreational activities.

Special Events: On June 5, 2026, FEC partnered with the Alzheimer's Aid Society to host the 1st Alzheimer's/Dogzheimer's Walk. The event featured a variety of local vendors, informational booths, pet adoptions, and live music. Both FEC and the Alzheimer's Aid Society are excited to continue building this partnership, raising awareness about Alzheimer's and Dogzheimers, and highlighting FEC's park facilities that offer recreation opportunities for both people and their dogs.

On June 7, 2026, FEC held its annual Community Yard Sale at Howe Park, relocating the event from its usual spot due to the construction of the Safe Play Park. However, the limited parking available in the front lot resulted in a high volume of vehicle traffic within the event area. To maintain traffic flow and prevent congestion, staff were required to allow vehicles to travel through portions of the sale, reducing the pedestrian-only environment and creating additional safety concerns for shoppers and vendors. Despite these challenges, the event was successful and well attended. To address safety and ongoing parking limitations, staff plan to move the October sale to the north grass area, creating a more pedestrian-friendly setup while preserving parking for shoppers, vendors, and other scheduled district programs. Vendor fees will remain unchanged, as registration has been open since April 1.

On June 27, 2026 FEC held the Party in the Park: Gala & Fundraiser presented by the Friends of FEC at the Conzelmann Community Center. The event was sponsored by Westwood, BHK law firm, SMUD, Sacramento County Supervisor Rich Desmond. The event featured a silent auction, full bar with signature cocktails and elegant buffet dinner for table sponsors, paid attendees, guests and FEC staff. Speakers at the event included 3 FEC board members to commemorate FEC's 70th anniversary. After dinner attendees were treated to live music from The Killer Dueling Pianos. This event was the 2nd of 4 events planned to commemorate our 70th anniversary.

Upcoming Events: Cottage Pool 4th of July Celebration Friday, June 5, 2026. Dive-In Movie Night at Cottage Pool, Friday, July 10, 2026. Dive-In Movie Night at Cottage Pool, Friday, August 14, 2026 (Flyer included).

FEC Stingrays Swim and Synchronized Swimming: The FEC Stingray Booster Club held meetings on June 1, June 15 and June 29 at the Cottage Community Center. The FEC Stingrays hosted three successful home swim meets at Cottage Pool during the month of June, welcoming Del Norte on June 6 (Disney/Superhero theme), Sac Town on June 13 (Neon/Tie-Dye theme), and Fair Oaks on June 20 (College Day/Senior Recognition theme). The swim team also competed in an away meet against Gold River on June 27. Team Picture Day was held on June 11, at Cottage Pool. The synchronized swimming team competed in an away meet against Davis

on June 3, hosted a home meet against Sunrise on June 10, and concluded the month with an away meet against Cordova on June 20. Beginning June 15, the Stingrays swim team added morning practices on Tuesdays and Thursdays, while the synchronized swimming team began morning practices Monday through Friday. FEC has also continued its long-term partnership with Kaiser Permanente at the Morse Avenue campus, which provides parking that is instrumental in accommodating the large attendance associated with home swim meets and synchronized swimming events.

2026 Public Swim: Weekday public swim hours began on June 9, with the pool open Tuesday through Friday from 1:00 p.m. to 4:00 p.m. Weekend hours will continue from 2:30 p.m. to 6:00 p.m. Additionally, Cottage Pool will host a Fourth of July celebration from 2:00 p.m. to 6:00 p.m., featuring discounted admission and complimentary sandwiches provided by Chick-fil-A and the Fulton Avenue Association.

2026 Aquatics Staff: The FEC maintains a part time aquatic staff of 21 including lifeguards, pool attendants, and cashiers. This figure does not include FEC coaches for the swim and synchronized swimming teams. On Sunday, June 28, the FEC Aquatic Manager conducted an all-staff in-service training at Cottage Pool. FEC lifeguards continue to provide supervision during Stingray practices, public swim hours, and private pool events, ensuring a safe and welcoming environment for all pool users.”

2026 Swim Lessons: The first session of FEC swim lessons took place from June 1 to June 11, serving 52 participants. The second session ran from June 15 to June 25, with 51 participants enrolled. To date, FEC has delivered swim instruction to a total of 103 swimmers this season.

Publicity & Community Outreach: Recreation resources and event flyers are regularly shared across all major social media platforms, including Facebook, Twitter, Instagram, and Nextdoor. Updates regarding FEC parks are posted on both the district website and social media channels to keep residents informed. FEC’s upcoming event information was delivered to 2,894 individual e-mail accounts with a 45 % open rate. During June, the FEC website recorded 69,059 page views. FEC staff continue to explore new strategies to engage with the community. A FEC outreach table was provided at the 1st Alzheimer’s/Dogzheimer’s Walk and Community Yard Sale.

Facility Rentals: FEC had 8 picnic rentals for the month of June with a gross revenue of \$1,377.50. FEC had 20 hall/board room rentals for the month of June with a gross revenue of \$11,355.00.

MAINTENANCE ACTIVITY REPORT

June 2026 Maintenance Division Work Summary

Bellview Park:

Normal maintenance
Trash removal
Tree trimming
Park inspection
Graffiti removal from play structures
Inspection of playground
Transient presence still growing in gate corridors
Irrigation repairs

Bohemian Park:

Normal maintenance
Tree trimming
Painting over graffiti
Inspection of playgrounds and park
Vandalism repair
Transient camp cleanups
Heavy daily cleanup

Cottage Park:

Normal maintenance
Pool Maintenance
Removal of fallen branches
Removal of graffiti
Inspection of playgrounds
Vacuumed pool
Pressure washed playground
Bridge repaired

Creekside Nature Area:

Normal maintenance

Howe Park:

Graffiti Maintenance
Regular maintenance
Inspection of playgrounds and park
Repair irrigation (ongoing)
Large increase in transient presence has impacted Howe's daily cleaning

Pond pump & fountain cleaning 3x weekly
Baseball preps

Santa Anita Park:

Normal maintenance
Repair of irrigation
Removal of graffiti (ongoing daily)
Removal of tree limbs
Transient cleanup

Seely Park:

Normal maintenance
Cleaning of the pump room interior
Removal of dead limbs
Inspection of the park and playgrounds
Daily clearing of fountain drains
Restrooms open for the season

All Parks:

Regular playground maintenance, including raking of the safety surface material
BBQ ash cleanup
Heavy daily pickup of litter and garbage removal
Heavy removal of homeless camp litter
Daily graffiti removal
Irrigation repairs

CONSENT AGENDA 4.3:
GENERAL MANAGER'S REPORT FOR JUNE-JULY 2026



**GENERAL MANAGER'S MONTHLY UPDATE
TO THE BOARD OF DIRECTORS
JUNE-JULY 2026**

To: Board of Directors
From: Emily J. Ballus, General Manager
Date: June-July 2026

The General Manager's report provides Board members with information about operational activities and updates. The items included give the Board an abridged overview of the park district undertakings. The subjects may augment matters that are germane to decisions the Board may need to consider.

1. KEY MEETINGS

- June 22 Victoria Artishuk, CA Depart of State Parks on the Outdoor Equity Grant
- July 2 Meeting with working group on Outdoor Equity Grant for Afghan girls with Janice Kelley, Angelina Moradzadeh, and Mariam Darwish for planning purposes.
- July 7 John H. Nicolaus, Principal Landscape Architect, Wood Rodgers, Inc, on park signage plan and parking plan discussion.
- July 9 David Leddy, Low Income Financial Empowerment (LIFE) Program Manager, CalAlliance FCU regarding partnership opportunities at Bohemian Park.

2. ADVOCACY

Babcock Park

Twin Rivers is still working on equipment installation.

Bohemian Park Expansion Project

We are responding to the feedback we received on June 22, 2026.

Measure Q

Staff report provided during the board meeting.

3. EVENTS - UPCOMING

Friday, August 14

Dive In Movie – Cottage Pool

Public Swim 7:00 pm - 8:30

Movie at Approx. 9pm

4. GRANTS/SPONSORSHIPS

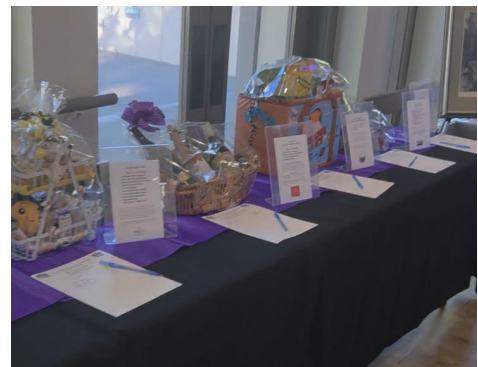
None.

5. DISTRICT HAPPENINGS

Adventure Camp: FEC Adventure Campers took a day trip top Old Sacramento, having some fun playtime at Cottage Elementary, riding in the new Rotary van!



FEC 70th Anniversary Gala Dinner: On June 27, the District celebrated its 70th anniversary in style, with a performance by the Killer Dueling Pianos, silent auction gift baskets, a lovely dinner, and signature cocktails.



6. SAFETY

In a note we received form a local resident, we would like to recognize Christine for her diligence in helping keep our parks safe and notifying the District of her actions. Because of this notice, FEC staff was able to provide the information to Trident Security and the Off Duty sheriff patrolling the parks. These efforts help FEC proactively notify the sheriff and security of such activities.

From: Christine [REDACTED]
Sent: Thursday, July 9, 2026 10:17 AM
To: Dounia Beshara
Subject: July 9 incident at Santa Anita Park

Per our recent conversation, I thought it was important to let someone at parks and rec know about an incident that happened yesterday in Santa Anita Park near the neighborhood portion of the park

Yesterday there was a young male mid 20s possibly early 30s white male 5'9 brown hair riding a one wheel in the open grass area of Santa Anita park along with a pitbull who was off leash. When my husband politely asked the man to put his dog on a leash he became extremely aggressive and violent. He threatened my husband, threatened people in the neighborhood was cursing and using expletives.

A police report was filed 911 was called. A code enforcement report was also filed for the loose pitbull, and we wanted to give parks and rec the information about his vehicle along with his plate number. The man drove off in an older Ford expedition plate number 9NBW740. For your reference, I am attaching a copy of the photos.

If you need to reach out to me, I am available at [REDACTED].

Thank you, Christine



**FULTON-EL CAMINO RECREATION AND PARK DISTRICT
BOARD OF DIRECTORS MEETING
July 16, 2026**

Item No. 5.1

Proposed Temporary Construction Easement Agreement with the County of Sacramento for Bike Lane along Bell Street by Howe Park

STAFF REPORT

TO: Board of Directors

FROM: Emily Ballus, General Manager

SUBJECT: Proposed Temporary Construction Easement Agreement with the County of Sacramento for Bike Lane along Bell Street by Howe Park

- Informational Presentation Only -

Date: July 16, 2026

PURPOSE OF PRESENTATION

This item is presented for informational purposes only. No Board action, approval, or authorization is requested at this time.

BACKGROUND

The County of Sacramento is planning construction activities associated with a Bike Lane along Howe Park on Bell Street and has requested a Temporary Construction Easement (TCE) over a portion of District property to support project construction.

The proposed agreement would provide the County temporary access and use of the identified area while allowing the District to retain ownership of the property.

Proposed Easement Terms

Key provisions of the proposed Temporary Construction Easement include:

- Temporary access to a designated portion of District property for construction-related activities.
- Term beginning March 1, 2028 and ending February 28, 2031, or upon completion of construction activities, whichever occurs first.
- Compensation to the District in the amount of \$1,500 for the temporary use of the easement area.

NEXT STEPS

Staff is providing this overview to inform the Board of the proposed easement and its relationship to the Howe Park. Any future action, if needed, will be brought back to the Board for consideration at a later date.

ATTACHEMENTS

- Easement for Temporary Construction
- Proposed Agreement for Purchase of Temporary Construction Easement
- Bike Lane Aerial View

RED File No.: 25-05-070
OWNER: Fulton-El Camino Rec & Park
District
APN: 278-0121-008
Project: Bell Street SRTS - SacDOT

AGREEMENT FOR PURCHASE OF TEMPORARY CONSTRUCTION EASEMENT

This Agreement for Purchase of Temporary Construction Easement, (hereinafter referred to as "Agreement"), is made and entered into by and between the County of Sacramento, a political subdivision of the State of California, (hereinafter referred to as "County"), and Fulton-El Camino Recreation and Park District, a political subdivision of the State of California, County of Sacramento, (hereinafter referred to as "Owner").

The parties hereby agree as follows:

1. TEMPORARY CONSTRUCTION EASEMENT.

Owner hereby grants to County and County agrees to purchase from Owner, pursuant to the terms and conditions set forth in this Agreement, a Temporary Construction Easement (TCE) over the real property shown on the plat attached hereto as Exhibit "A" (hereinafter referred to as "Property"). Owner affirms that it is the owner of the property rights to be transferred by the TCE and is empowered to execute this Agreement. This document will not be recorded.

2. PURCHASE PRICE.

County shall pay Owner the sum of **\$1,500.00** for the TCE and use of the TCE area for the Term (defined in Paragraph 3), including, if any, all improvements, damages, and severance.

3. POSSESSION, TERM.

County's right to possession and use of the TCE area by the County will commence on March 1, 2028 (Commencement Date) and terminates on February 28, 2031, a period of Thirty-Six (36) months the ("Term"), after the Commencement Date; or completion of Project related construction activities on Owner's property, whichever occurs first.

4. OWNER'S INDEMNIFICATION.

Owner covenants and agrees to indemnify and hold the County harmless from any and all claims that third parties may make or assert with respect to the title to the premises and any improvements. Owner's obligation herein to indemnify the County shall not exceed the amount paid to Owner under this Agreement.

5. RESTORATION OF TEMPORARY CONSTRUCTION EASEMENT AREA.

Prior to the termination of the TCE (inclusive of any extension thereto), County shall restore the Property to a similar or like condition to that existing on the date of the Agreement. Said restoration of Owners Remainder Property is shown on the attached (hereinafter referred to as "Exhibit B")

6. LEASE WARRANTY.

Owner warrants there are no oral or written leases on any portion of the Property exceeding a period of one month, excepting that/those made known to the County as of the date of this Agreement.

7. COUNTY'S OPERATIONS AND LIABILITY.

County agrees to release Owner from any liability arising out of the County's operations under this Agreement. Furthermore, County agrees to assume responsibility for any damages caused by reason of the County's operations under this Agreement and will at County's option either repair or pay for such damage.

8. SEVERABILITY.

If any provision in this Agreement is held by a court of competent jurisdiction to be invalid, void or unenforceable, the remaining provisions shall continue in full force without being impaired.

9. GOVERNING LAW.

This Agreement shall be governed by and construed in accordance with the laws of the State of California.

10. PUBLIC PURPOSE.

County requires the TCE for the Project and County can acquire the TCE through the exercise of the power of eminent domain. Owner is compelled to sell and County is compelled to acquire the TCE.

Both Owner and County recognize the expense, time, effort and risk to both Owner and County in resolving a dispute over compensation for the TCE by eminent domain litigation; and the compensation set forth is in compromise and settlement in lieu of such litigation.

11. AUTHORITY AND EXECUTION.

This Agreement which is valid only when executed by County, constitutes the complete understanding and agreement of the parties hereto and no oral representation shall in any manner vary the terms hereof or be binding.

12. WARRANT OF SIGNATURE AUTHORITY.

Owner warrants the signature appearing on this instrument of real property (i.e.

Easement Deed, Grant Deed, Quitclaim Deed) has the legal and requisite signatory authority for the conveyance of Owner's real property interest. Further, the parties acknowledge and agree that County, which is a public entity, is relying on said Warrant of Signature Authority when accepting this real property instrument.

13. ENTIRE AGREEMENT.

The performance of this Agreement constitutes the entire consideration for the conveyances from Owner and shall relieve the County of all further obligation or claim on this account, or on account of the location, grade or construction of the proposed public improvement and related facilities and/or structures.

14. COUNTERPARTS

Agreement may be executed in several counterparts and shall be deemed one and the same agreement. Electronic and scanned signatures shall be deemed original signatures for all purposes, including proof of terms herein, and shall be binding on each party.

15. TITLE VI COMPLIANCE AND NON-DISCRIMINATION

The parties to this contract shall, pursuant to Section 21.7(a) of Title 49, Code of Federal Regulations, comply with all elements of Title VI of the Civil Rights Act of 1964. This requirement under Title VI and the Code of Federal Regulations is to complete the USDOT-Non-Discrimination Assurance requiring compliance with Title VI of the Civil Rights Act of 1964, 49 C.F.R. Part 21 and 28 C.F.R. Section 50.3

During the performance of this Agreement, the parties shall comply with all elements of Title VI of the Civil Rights Act of 1964, which mandates that no person in the United States shall, on the ground of race, color, or national origin shall be denied the benefits of, or be otherwise subjected to discrimination under any program or activity receiving federal financial assistance, or that is the subject of this Agreement.

In addition, the County shall not deny any benefits to any person on the basis of religion, color, ethnic group identification, sex, sexual orientation, gender, gender identity, marital status, age, physical or mental disability, and shall not discriminate unlawfully against any other protected class under state and federal law.

This Agreement shall bind the respective heirs, personal representatives, successors, and assigns of the parties hereto.

IN WITNESS WHEREOF, the parties have executed this Agreement as follows:

County	Owner	Fulton-El Camino Recreation and Park District
Agreement Date: _____	Date: _____	_____
By: _____	By: _____	_____
Printed Name: _____	Printed Name: _____	_____
Title: _____	Title: _____	_____
By SCC §2.61.020		
	Address: _____	_____
	Telephone: _____	_____
	Email: _____	_____

RECOMMENDED BY:

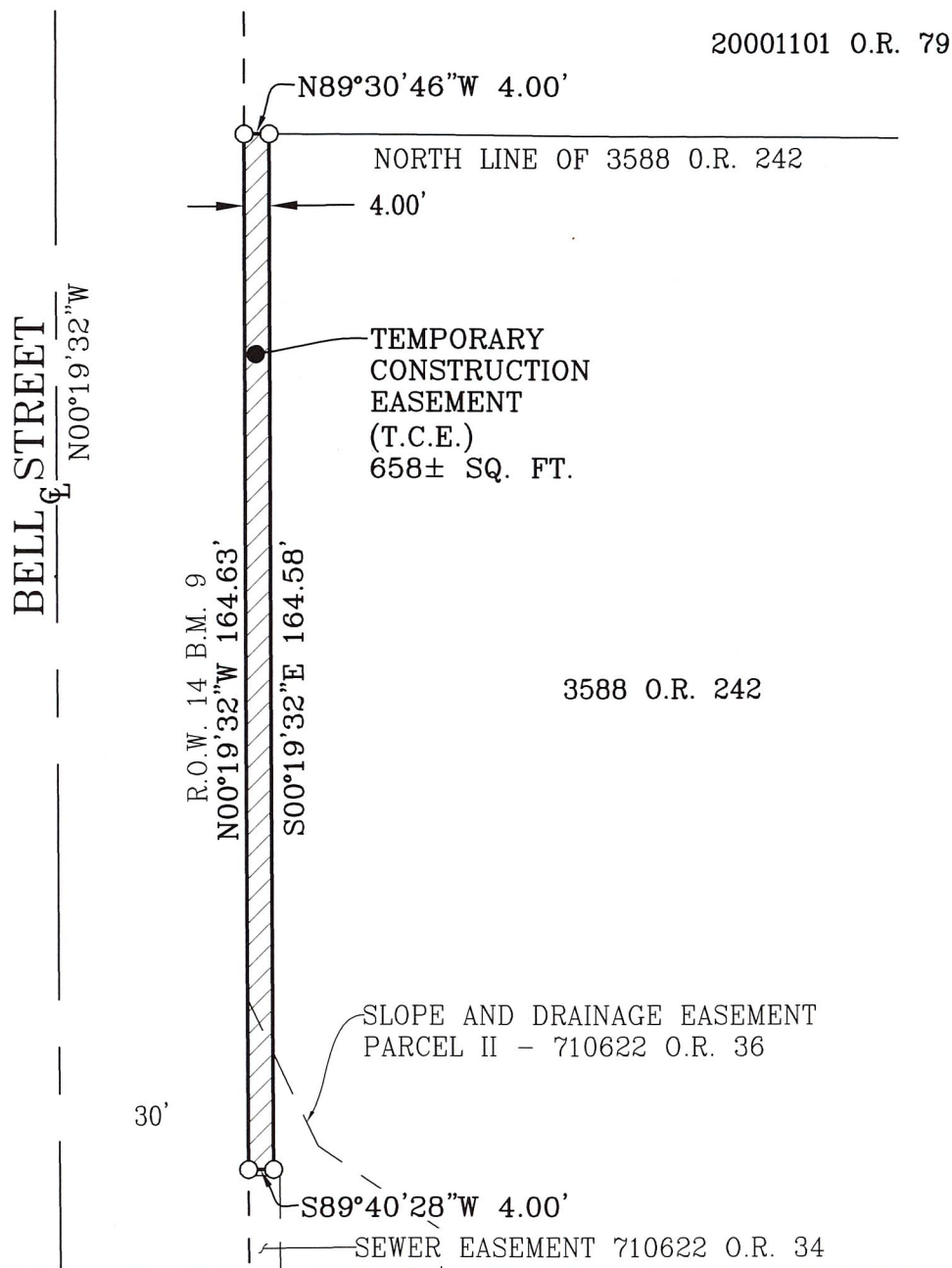
Shirley A. Fong
Real Estate Officer II
Real Estate Division
County of Sacramento

EXHIBIT "A"



LEGEND

○	DIMENSION POINT
⌒	STREET CENTERLINE
R.O.W.	RIGHT OF WAY
DOC#	RECORDING DOCUMENT NUMBER
O.R.	OFFICIAL RECORDS
T.C.E.	TEMPORARY CONSTRUCTION EASEMENT



COUNTY OF SACRAMENTO
COMMUNITY DEVELOPMENT DEPARTMENT
SURVEY SECTION

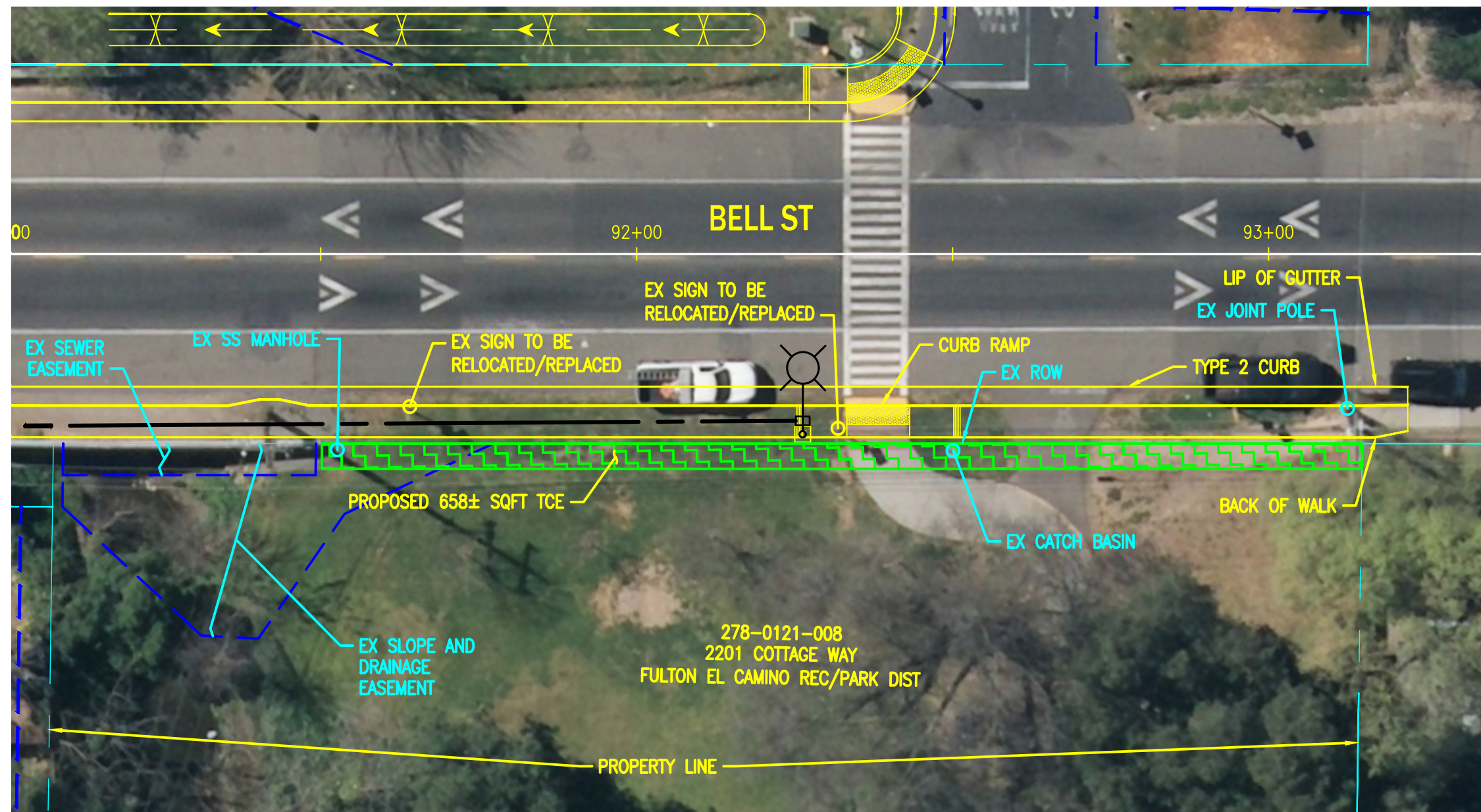
DATE: DECEMBER 2025 SHEET: 1 OF 1

T.C.E. EXHIBIT
A PORTION OF 3588 O.R. 242
(APN: 278-0121-008)

COUNTY OF SACRAMENTO-STATE OF CALIFORNIA

SCALE: 1" = 30'

B152



NOTE

—PLAN IS PRELIMINARY AND SUBJECT TO CHANGE
 —CALLOUTS OF EXISTING (EX) CIVIL FEATURES ON THIS PAGE ARE INFORMATIONAL AND ARE NOT TO BE CONSIDERED TO BE INCLUSIVE OF ALL EXISTING CONDITIONS IN THE FIELD

EXHIBIT "B"

LEGEND



TEMPORARY CONSTRUCTION EASEMENT (TCE)



PUBLIC UTILITIES AND PUBLIC FACILITIES EASEMENT (PUPFE)

PROPOSED (PR) CIVIL FEATURES, R/W AND EASEMENTS

EXISTING (EX) CIVIL FEATURES, R/W AND EASEMENTS



APN 278-0121-008 - 2201 COTTAGE WAY
 BELL STREET SAFE ROUTES TO SCHOOL PROJECT
 EDISON AVE TO HURLEY WAY

DATE: FEBRUARY 2025	HORIZONTAL SCALE: 1"=20'	VERTICAL SCALE: NONE	DRAWN BY: KM	DESIGN BY: EWW	CHECK BY: KRG	DWG 1 of 1
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Okay to Accept by

Signature & Date:

Print Name & Dept:

APN:

278-0121-008

Project Name & Dept:

Bell Street SRTS - SacDOT

EASEMENT FOR TEMPORARY CONSTRUCTION

Fulton-El Camino Recreation and Park District, a political subdivision of the State of California, County of Sacramento

(hereinafter referred to as “Owner”) does hereby grant to the County of Sacramento, a political subdivision of the State of California (hereinafter referred to as “County”), an Easement for Temporary Construction (hereinafter referred to as “TCE”) for purposes of performing activities related to and incidental to the construction of the Bell Street SRTS Project, (hereinafter referred to as “Project”), and other Project-related purposes upon, over and across that certain real property in the County of Sacramento, State of California, described as follows:

See Exhibit “TCE Exhibit” attached hereto and made a part hereof;

Possession and use of the TCE area by the County will commence on March 1, 2028 (Commencement Date) and terminates on February 28, 2031, a period of Thirty Six (36) months after the Commencement Date; or completion of Project related construction activities on Owner’s property, whichever occurs first.

RED File No. 25-06-070

LOG No. _____

Warrant of Signature Authority. The Grantor warrants the signature appearing on this instrument of real property (i.e. Easement Deed, Grant Deed, Quit Claim Deed) has the legal and requisite signatory authority for the conveyance of Grantor's real property interest. Further, the Parties acknowledge and agree that this Grantee, which is a public entity, is relying on said Warrant of Signature Authority when accepting this real property instrument for recordation.

Dated this _____ day of _____, 20____

Fulton-El Camino Recreation and Park District, a political subdivision of the State of California, County of Sacramento

By: _____

Print Name:_____

Title:_____

CERTIFICATE OF ACCEPTANCE

- County of Sacramento -

This is to certify that the interest in real property conveyed by the within deed, the provisions of which are incorporated by this reference as though fully set forth in this Certification, to the County of Sacramento, a political subdivision of the State of California, is hereby accepted by the undersigned officer pursuant to authority conferred by Resolution No. 2011-0011 of the Board of Supervisors of said County adopted on January 11, 2011, and the Grantee consents to recordation thereof by its duly authorized officer.

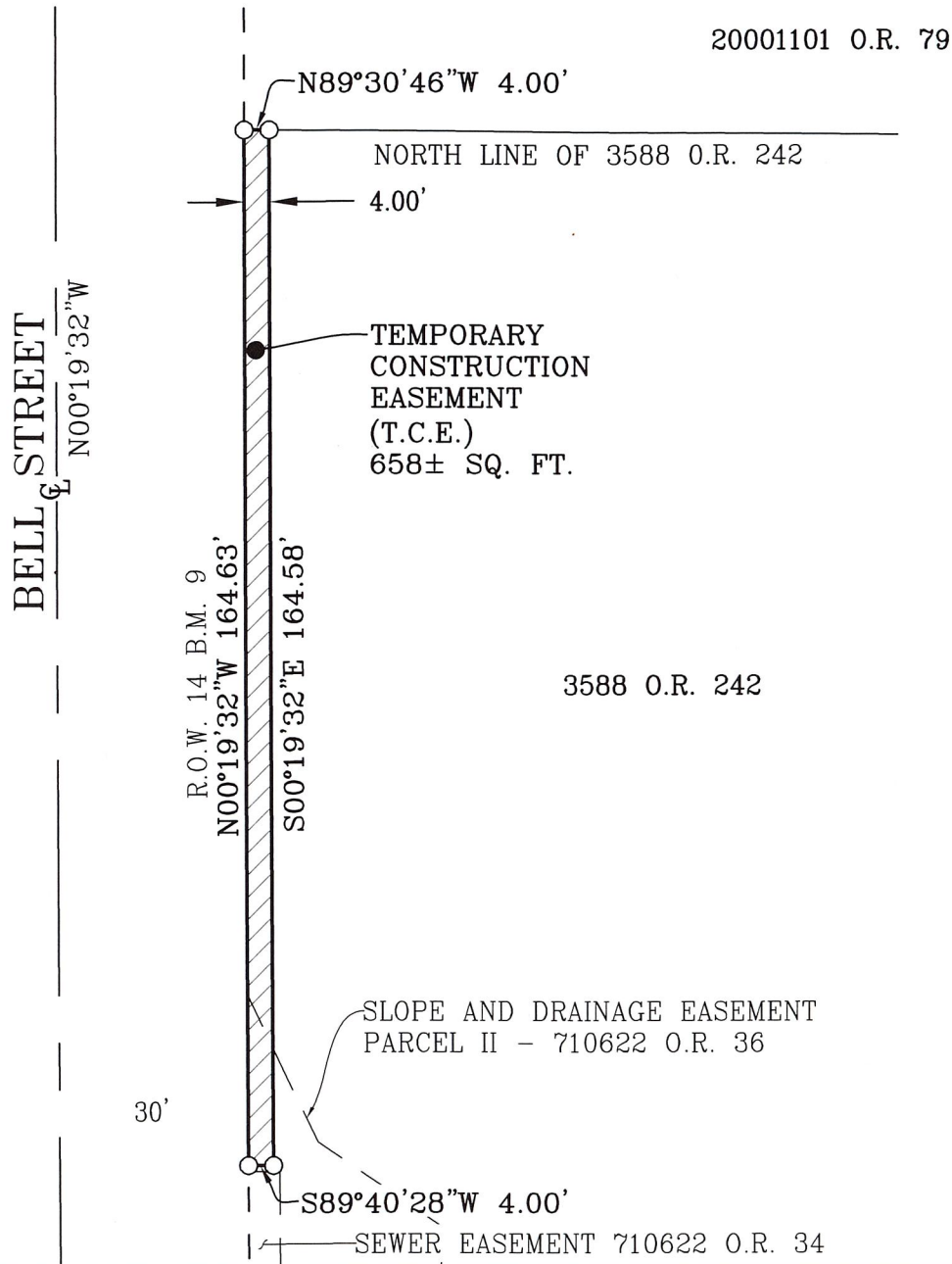
Director of General Services

Date



LEGEND

○	DIMENSION POINT
℄	STREET CENTERLINE
R.O.W.	RIGHT OF WAY
DOC#	RECORDING DOCUMENT NUMBER
O.R.	OFFICIAL RECORDS
T.C.E.	TEMPORARY CONSTRUCTION EASEMENT



COUNTY OF SACRAMENTO
COMMUNITY DEVELOPMENT DEPARTMENT
SURVEY SECTION

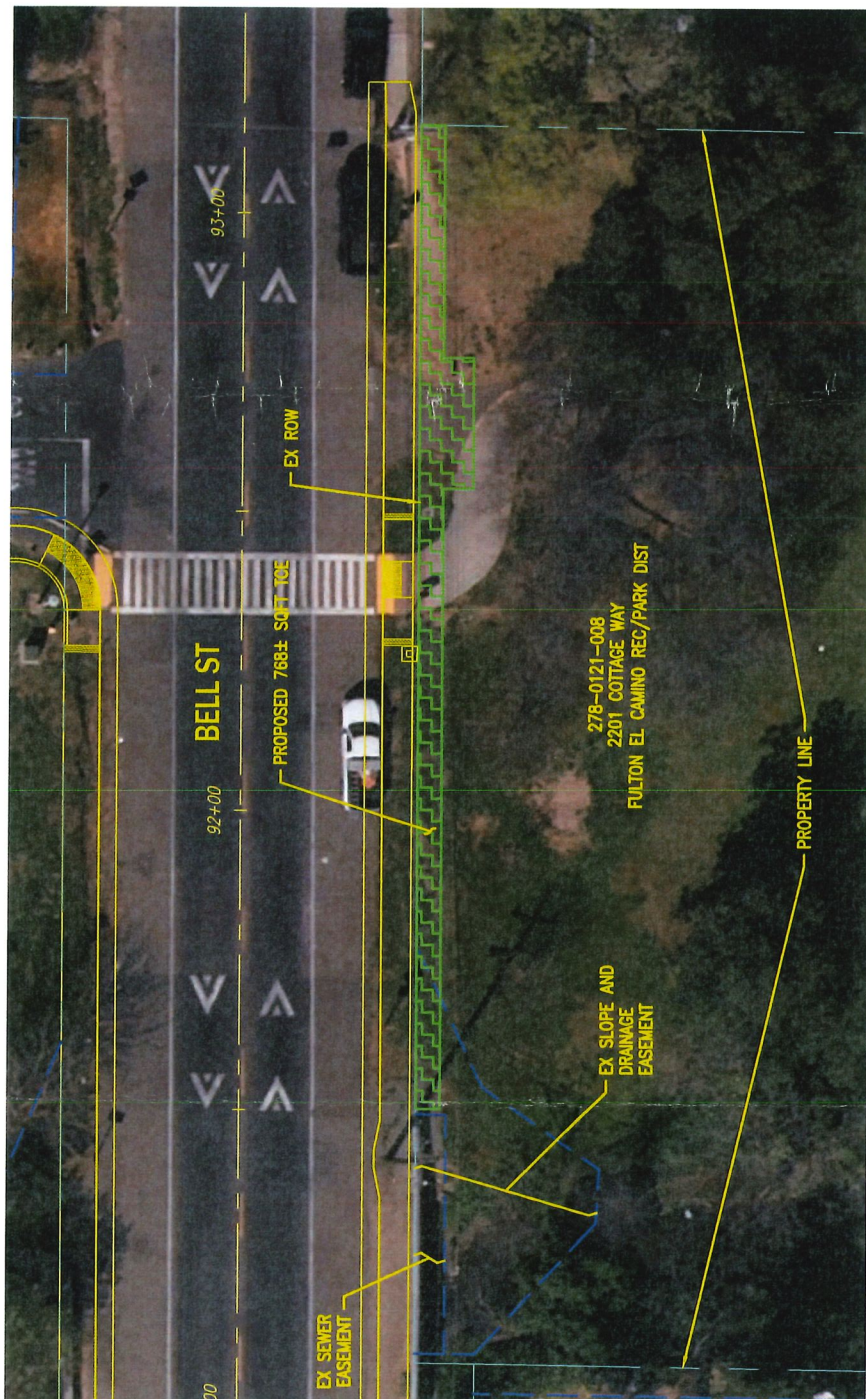
DATE: DECEMBER 2025 SHEET: 1 OF 1

T.C.E. EXHIBIT
A PORTION OF 3588 O.R. 242
(APN: 278-0121-008)

COUNTY OF SACRAMENTO-STATE OF CALIFORNIA

SCALE: 1" = 30'

B152



NOTE

THIS PLAN IS PRELIMINARY AND MAY CHANGE DURING FINAL DESIGN.

LEGEND

TEMPORARY CONSTRUCTION EASEMENT (TCE)



APN 278-0121-008 - 2201 COTTAGE WAY
BELL STREET SAFE ROUTES TO SCHOOL PROJECT
EDSON AVE TO HURLEY WAY

DATE: FEBRUARY 2025	HORIZONTAL SCALE: 1"=20'	VERTICAL SCALE: NONE	DRAWN BY: KM	DESIGN BY: EWM	CHECK BY: KRG	DWG 1 of 1
24: \SHARED FOLDERS\PROJECTS\BELL STREET SAFE ROUTES TO SCHOOL\AUTOCAD\EXHIBITS\PARCEL EXHIBITS\278-0121-008 - 2201 COTTAGE WAY.DWG Last Saved: 12/3/2024 3:17 PM Westone						

**FULTON-EL CAMINO RECREATION AND PARK DISTRICT
BOARD OF DIRECTORS MEETING
July 16, 2026**

ITEM NO. 6.1

Public Hearings and Approval of Resolution Nos. 2026/27-1 and 2026/27-2 Approving Engineer's Reports, Confirming Diagram and Assessment and Ordering Continuation of Assessment for Fiscal Year 2026-27 for the Parks Maintenance and Recreation Improvement Assessment Districts (Assessment # 1 and Assessment # 2).

STAFF REPORT

TO: Board of Directors

FROM: Emily Ballus, General Manager

SUBJECT: Public Hearings and Approval of Resolution Nos. 2026/27-1 & 2026/27-2 Approving Engineer's Reports, Confirming Diagram and Assessment and Ordering Continuation of Assessment for Fiscal Year 2026-27 for the Parks Maintenance and Recreation Improvement Assessment Districts (Assessment # 1 and Assessment # 2).

Date: July 16, 2026

RECOMMENDATION

It is recommended that the Board hold public hearings, consider all public comments, and subsequently approve the two Resolutions to approve the Engineer's Reports, confirm the diagram and assessments, and order the continuation of assessments for fiscal year 2026-27 for the Parks Maintenance and Recreation Improvement Assessment Districts (Assessment # 1 and Assessment # 2), as the final step in levying the assessments.

RESULT OF RECOMMENDED ACTION

The Board will order the continuation of the levy of the assessments for fiscal year 2026-27, and will cause those levies to be submitted by SCI Consulting Group to the County Auditor to be included on the 2026-27 property tax bills.

BACKGROUND

Assessment #1: This assessment was established by a vote of property owners in 2011 to replace a previously existing assessment, which had been established prior to Proposition 218.

Assessment #2: This assessment was established by a vote of property owners in 2000, due to declining revenues and escalating maintenance costs.

In order to continue to levy the assessments each year, the Board first adopts resolutions initiating the assessment proceedings for the year and directing the engineer of work, SCI Consulting Group, to prepare the annual Engineer's Reports for the District.

As its next step, the Board preliminarily approves the Engineer's Reports and sets the date for the annual public hearing for each assessment. Once the public hearing has concluded, the Board may vote on whether to continue the assessments for the coming fiscal year.

PROPOSED RATES

The proposed rates for Assessment #1 are \$38.33 per SFE in Zone of Benefit A and \$19.17 per SFE in Zone of Benefit B.

The proposed rates for Assessment #2 are \$24.02 per SFE in Zone of Benefit A and \$12.01 per SFE in Zone of Benefit B.

CONCLUSION

It is recommended that the Board hold the public hearings, consider any public comments, and consequently approve the Resolutions approving the Engineer's Reports and ordering the continuation of the levy of the assessments for Fiscal Year 2026-27, as the last step by the Board in the continuation of the levy of assessments for the Parks Maintenance and Recreation Improvement Districts (Assessment #1 and Assessment # 2) for the 2026-27 fiscal year.

ATTACHMENTS:

- Engineer's Report Assessment #1
- Engineers Report Assessment #2

**Fulton-El Camino Recreation and Park District
Parks Maintenance and Recreation Improvement Assessment District (Assessment # 1)**

**2201 Cottage Way
Sacramento, CA 95825**

RESOLUTION NO. 2026/27-1

**RESOLUTION OF THE BOARD OF DIRECTORS OF
THE FULTON-EL CAMINO RECREATION AND PARK DISTRICT**

**APPROVING ENGINEER'S REPORT, CONFIRMING DIAGRAM AND ASSESSMENT AND
ORDERING CONTINUATION OF ASSESSMENT FOR FISCAL YEAR 2026-27
FOR THE FULTON-EL CAMINO
PARKS MAINTENANCE AND RECREATION IMPROVEMENT ASSESSMENT DISTRICT
(ASSESSMENT # 1)**

RESOLVED, by the Board of Directors of the Fulton-El Camino Recreation and Park District (the "Board"), County of Sacramento, State of California, that

WHEREAS, by its Resolution No. 2011-22 approved on July 21, 2011, this Board ordered the formation of and levied the first assessment within the Fulton-El Camino Recreation and Park District, Parks Maintenance and Recreation Improvement Assessment District ("Assessment #1" or "Assessment District") pursuant to the provisions of the Article XIID of the California Constitution, and the Landscaping and Lighting Act of 1972 (the "Act"), Part 2 of Division 15 of the California Streets and Highways Code (commencing with Section 22500 thereof); and

WHEREAS, the purpose of the Assessment District is for the installation, maintenance and servicing of improvements within the Fulton-El Camino Recreation and Park District, as described in the annual Engineer's Report; and

WHEREAS, March 19, 2026, by its Resolution No. 2025/26-17, a resolution Directing Preparation of the 2026-27 Engineer's Report for the continuation of the Fulton-El Camino Recreation and Park District, Parks Maintenance and Recreation Improvement Assessment District (the "Assessment District" or "Assessment #1"), this Board designated SCI Consulting Group as Engineer of Work and ordered said Engineer to make and file a report in writing in accordance with and pursuant to the Landscaping and Lighting Act of 1972 and Article XIID of the California Constitution; and

WHEREAS, the Board of Directors adopted Resolution No. 2025/26-21 on June 18, 2026, Declaring Intention to Continue Assessments for Fiscal Year 2026-27, Preliminarily Approving Engineer's Report, and Providing for Notice of Hearing for the Fulton-El Camino Parks Maintenance and Recreation Improvement Assessment District; and said resolution declared the intention to continue to levy and collect assessments for fiscal year 2026-27 upon certain real property within the boundaries of the Assessment District, at an assessment rate of \$38.33 per single family equivalent benefit unit for Zone A, and \$19.17 per single family equivalent benefit unit for Zone B, as described with more detail in the Engineer's Report; and

WHEREAS, the report was duly made and filed with the Secretary of the Board and duly considered by this Board and found to be sufficient in every particular, whereupon it was determined that the report should stand as the Engineer's Report for all subsequent proceedings under and pursuant to the aforesaid resolution, and that July 16, 2026 at the hour of 6:30 p.m. at the district offices of the Fulton-El Camino Recreation and Park District (Richard T. Conzelmann Community Center), located at 2201 Cottage Way, Sacramento, California 95825, were appointed as the time and place for a hearing by this Board on the question of the continuation of the assessment, notice of which hearing was given as required by law; and

WHEREAS, at the appointed time and place the hearing was duly and regularly held, and all persons interested and desiring to be heard were given an opportunity to be heard, and all matters and things pertaining to the levy were fully heard and considered by this Board, and all oral statements and all written protests or communications were duly heard, considered and overruled, and this Board thereby acquired jurisdiction to order the levy and the confirmation of the diagram and assessment prepared by and made a part of the Engineer's Report to pay the costs and expenses thereof;

NOW, THEREFORE, IT IS FOUND, DETERMINED AND ORDERED, that:

1. The public interest, convenience and necessity require that the continuation of the levy be made.
2. The land within the Assessment District will be specially benefited by the improvements and assessed to pay the costs and expenses thereof, and the exterior boundaries thereof, are as shown by a map thereof filed in the office of the Secretary of the Board, which map is made a part hereof by reference thereto.
3. The assessment is levied without regard to property valuation.
4. The Engineer's Report as a whole and each part thereof, to wit:
 - a. the Engineer's estimate of the itemized and total costs and expenses of maintaining the improvements and of the incidental expenses in connection therewith;
 - b. the diagram showing the assessment district, plans and specifications for the improvements to be maintained and the boundaries and dimensions of the respective lots and parcels of land within the Assessment District; and
 - c. the assessment of the total amount of the cost and expenses of the proposed maintenance of the improvements upon the several lots and parcels of land in the Assessment District in proportion to the estimated special benefits to be received by such lots and parcels, respectively, from the maintenance, and of the expenses incidental thereto; and

are finally approved and confirmed.

5. Final adoption and approval of the Engineer's Report as a whole, and of the plans and specifications, estimate of the costs and expenses, the diagram and the assessment, as contained in the report as hereinabove determined and ordered, is intended to and shall refer and apply to the report, or any portion thereof as amended, modified, or revised or corrected by, or pursuant to and in accordance with, any resolution or order, if any, heretofore duly adopted or made by this Board.
6. The continued assessment to pay the costs and expenses of the continued maintenance of the improvements for fiscal year 2026-27 is hereby levied. For further particulars pursuant to the provisions of the Landscaping and Lighting Act of 1972, reference is hereby made to the Resolution Directing Preparation of Engineer's Report.
7. Based on the oral and documentary evidence, including the Engineer's Report, offered and received at the hearing, this Board expressly finds and determines (a) that each of the several lots and parcels of land will be specially benefited by the maintenance of the improvements at least in the amount if not more than the amount, of the assessment apportioned against the lots and parcels of land, respectively; (b) that the Assessment is continued to be levied without regard to property valuation; and (c) that there is substantial evidence to support, and the weight of the evidence preponderates in favor of, the aforesaid finding and determination as to special benefits.
8. Immediately upon the adoption of this resolution, but in no event later than the second Monday in August following such adoption, the Secretary of the Board shall file a certified copy of the diagram and assessment and a certified copy of this resolution with the Auditor of the County of Sacramento. Upon such filing, the County Auditor shall enter on the County assessment roll opposite each lot or parcel of land the amount of assessment thereupon as shown in the assessment. The assessments shall continue to be collected at the same time and in the same manner as County taxes are collected and all laws providing for the collection and enforcement of County taxes shall apply to the collection and enforcement of the assessments. After collection by the County, the net amount of the assessments, after deduction of any compensation due the County for collection, shall be paid to the Parks Maintenance and Recreation Improvement District, Assessment #1, of the Fulton-El Camino Recreation and Park District.
9. Upon receipt of the moneys representing assessments collected by the County, the General Manager shall deposit the moneys in the District Treasury to the credit of the improvement fund previously established under the distinctive designation of the Assessment District. Moneys in the improvement fund shall be expended only for the maintenance, servicing, construction or installation of the improvements.
10. The Board of Directors of the Fulton-El Camino Recreation and Park District hereby certifies that the assessments to be placed on the fiscal year 2026-27 property tax bills meet the requirements of Proposition 218 that added Articles XIIC and XIID to the California Constitution.

PASSED AND ADOPTED THIS 16th day of July, 2026, on a motion by Director _____
and seconded by Director _____ and by the following vote:

YES:	DIRECTORS:
NO:	DIRECTORS:
ABSENT:	DIRECTORS:
ABSTAIN:	DIRECTORS:

Teresa Higgins, Chair
Board of Directors

ATTEST:

Kathleen Stricklin, Secretary
Board of Directors

**Fulton-El Camino Recreation and Park District
Parks Maintenance and Recreation Improvement Assessment District (Assessment # 2)**

**2201 Cottage Way
Sacramento, CA 95825**

RESOLUTION NO. 2026/27-2

**RESOLUTION OF THE BOARD OF DIRECTORS OF
THE FULTON-EL CAMINO RECREATION AND PARK DISTRICT**

**APPROVING ENGINEER'S REPORT, CONFIRMING DIAGRAM AND ASSESSMENT AND
ORDERING CONTINUATION OF ASSESSMENT FOR FISCAL YEAR 2026-27
FOR THE FULTON-EL CAMINO
PARKS MAINTENANCE AND RECREATION IMPROVEMENT ASSESSMENT DISTRICT
(ASSESSMENT # 2)**

RESOLVED, by the Board of Directors of the Fulton-El Camino Recreation and Park District (the "Board"), County of Sacramento, State of California, that

WHEREAS, by its Resolution No. 2000-7 approved on March 14, 2000, this Board ordered the formation of and levied the first assessment within the Fulton-El Camino Recreation and Park District, Parks Maintenance and Recreation Improvement Assessment District ("Assessment District" or "Assessment #2") pursuant to the provisions of the Article XIID of the California Constitution, and the Landscaping and Lighting Act of 1972 (the "Act"), Part 2 of Division 15 of the California Streets and Highways Code (commencing with Section 22500 thereof); and

WHEREAS, the purpose of the Assessment District is for the installation, maintenance and servicing of improvements within the Fulton-El Camino Recreation and Park District, as described in the annual Engineer's Report; and

WHEREAS, March 19, 2026, by its Resolution No. 2025/26-18, a resolution Directing Preparation of the 2026-27 Engineer's Report for the continuation of the Fulton-El Camino Recreation and Park District, Parks Maintenance and Recreation Improvement Assessment District (the "Assessment District" or "Assessment #2"), this Board designated SCI Consulting Group as Engineer of Work and ordered said Engineer to make and file a report in writing in accordance with and pursuant to the Landscaping and Lighting Act of 1972 and Article XIID of the California Constitution; and

WHEREAS, the Board of Directors adopted Resolution No. 2025/26-22 on June 18, 2026, Declaring Intention to Continue Assessments for Fiscal Year 2026-27, Preliminarily Approving Engineer's Report, and Providing for Notice of Hearing for the Fulton-El Camino Parks Maintenance and Recreation Improvement Assessment District; and said resolution declared the intention to continue to levy and collect assessments for fiscal year 2026-27 upon certain real property within the boundaries of the Assessment District, at an assessment rate of \$24.02 per single family equivalent benefit unit for Zone A, and \$12.01 per single family equivalent benefit unit for Zone B, as described with more detail in the Engineer's Report; and

WHEREAS, the report was duly made and filed with the Secretary of the Board and duly considered by this Board and found to be sufficient in every particular, whereupon it was determined that the report should stand as the Engineer's Report for all subsequent proceedings under and pursuant to the aforesaid resolution, and that July 16, 2026 at the hour of 6:30 p.m. at the district offices of the Fulton-El Camino Recreation and Park District (Richard T. Conzelmann Community Center), located at 2201 Cottage Way, Sacramento, California 95825, were appointed as the time and place for a hearing by this Board on the question of the continuation of the assessment, notice of which hearing was given as required by law; and

WHEREAS, at the appointed time and place the hearing was duly and regularly held, and all persons interested and desiring to be heard were given an opportunity to be heard, and all matters and things pertaining to the levy were fully heard and considered by this Board, and all oral statements and all written protests or communications were duly heard, considered and overruled, and this Board thereby acquired jurisdiction to order the levy and the confirmation of the diagram and assessment prepared by and made a part of the Engineer's Report to pay the costs and expenses thereof;

NOW, THEREFORE, IT IS FOUND, DETERMINED AND ORDERED, that:

1. The public interest, convenience and necessity require that the continuation of the levy be made.
2. The land within the Assessment District will be specially benefited by the improvements and assessed to pay the costs and expenses thereof, and the exterior boundaries thereof, are as shown by a map thereof filed in the office of the Secretary of the Board, which map is made a part hereof by reference thereto.
3. The assessment is levied without regard to property valuation.
4. The Engineer's Report as a whole and each part thereof, to wit:
 - a. the Engineer's estimate of the itemized and total costs and expenses of maintaining the improvements and of the incidental expenses in connection therewith;
 - b. the diagram showing the assessment district, plans and specifications for the improvements to be maintained and the boundaries and dimensions of the respective lots and parcels of land within the Assessment District; and
 - c. the assessment of the total amount of the cost and expenses of the proposed maintenance of the improvements upon the several lots and parcels of land in the Assessment District in proportion to the estimated special benefits to be received by such lots and parcels, respectively, from the maintenance, and of the expenses incidental thereto;

are finally approved and confirmed.

5. Final adoption and approval of the Engineer's Report as a whole, and of the plans and specifications, estimate of the costs and expenses, the diagram and the assessment, as contained in the report as hereinabove determined and ordered, is intended to and shall refer and apply to the report, or any portion thereof as amended, modified, or revised or corrected by, or pursuant to and in accordance with, any resolution or order, if any, heretofore duly adopted or made by this Board.
6. The continued assessment to pay the costs and expenses of the continued maintenance of the improvements for fiscal year 2026-27 is hereby levied. For further particulars pursuant to the provisions of the Landscaping and Lighting Act of 1972, reference is hereby made to the Resolution Directing Preparation of Engineer's Report.
7. Based on the oral and documentary evidence, including the Engineer's Report, offered and received at the hearing, this Board expressly finds and determines (a) that each of the several lots and parcels of land will be specially benefited by the maintenance of the improvements at least in the amount if not more than the amount, of the assessment apportioned against the lots and parcels of land, respectively; (b) that the Assessment is continued to be levied without regard to property valuation; and (c) that there is substantial evidence to support, and the weight of the evidence preponderates in favor of, the aforesaid finding and determination as to special benefits.
8. Immediately upon the adoption of this resolution, but in no event later than the second Monday in August following such adoption, the Secretary of the Board shall file a certified copy of the diagram and assessment and a certified copy of this resolution with the Auditor of the County of Sacramento. Upon such filing, the County Auditor shall enter on the County assessment roll opposite each lot or parcel of land the amount of assessment thereupon as shown in the assessment. The assessments shall continue to be collected at the same time and in the same manner as County taxes are collected and all laws providing for the collection and enforcement of County taxes shall apply to the collection and enforcement of the assessments. After collection by the County, the net amount of the assessments, after deduction of any compensation due the County for collection, shall be paid to the Parks Maintenance and Recreation Improvement District, Assessment #2, of the Fulton-El Camino Recreation and Park District.
9. Upon receipt of the moneys representing assessments collected by the County, the General Manager shall deposit the moneys in the District Treasury to the credit of the improvement fund previously established under the distinctive designation of the Assessment District. Moneys in the improvement fund shall be expended only for the maintenance, servicing, construction or installation of the improvements.
10. The Board of Directors of the Fulton-El Camino Recreation and Park District hereby certifies that the assessments to be placed on the fiscal year 2026-27 property tax bills meet the requirements of Proposition 218 that added Articles XIIC and XIID to the California Constitution.

PASSED AND ADOPTED THIS 16th day of July, 2026, on a motion by Director _____
and seconded by Director _____ and by the following vote:

YES:	DIRECTORS:
NO:	DIRECTORS:
ABSENT:	DIRECTORS:
ABSTAIN:	DIRECTORS:

Teresa Higgins, Chair
Board of Directors

ATTEST:

Kathleen Stricklin, Secretary
Board of Directors



Fulton-El Camino Recreation and Park District Engineer's Report

Parks Maintenance & Recreation Improvement District
(Assessment #1)

July 2026

Engineer's Report

Pursuant to the Landscaping and Lighting Act of 1972,
Article XIIID of the California Constitution

Engineer of Work:



4745 Mangels Boulevard
Fairfield, California 94534

707.430.4300

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FULTON-EL CAMINO RECREATION AND PARK DISTRICT

Board of Directors

Teresa Higgins, Chair

Michael Seaman, Vice Chair

Kathleen Stricklin, Secretary

Laura Lavallee, Director

Chris Fischer, Director

General Manager

Emily Ballus

Director of Finance and Administration

Mike Chahal

Director of Parks and Recreation

Ryan Harder

Engineer of Work

SCI Consulting Group

Lead Assessment Engineer, John Bliss, M.Eng., P.E.

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Introduction

Overview

The Fulton-El Camino Recreation and Park District (the “Park District”) provides park facilities and recreational programs to its service area of approximately 7,400 parcels. The Park District currently owns, operates or maintains seven neighborhood and community parks which are located throughout the developed areas of the Park District. In addition, the Park District assists with the maintenance of the sports fields at Howe Elementary School. The Park District’s facilities are summarized below.

District’s Facilities

District Parks/Facilities

1. Howe Park– 38 acres – 2201 Cottage Way: Richard T Conzelmann Community Center: (District offices, auditorium, meeting rooms), dog park, 1 youth playground and 2 tot lots, 4 softball diamonds, (2 lighted), 2 sand volleyball courts (lighted), tennis courts (lighted, token operated) tennis wall, soccer fields, picnic tables and barbecues, open play area, creek, pond/fishing piers, gazebo, and restrooms.
2. Santa Anita Park – 7.7 acres – 2298 Bell Street: picnic tables, disc golf course, free play area and creek area.
3. Bellview Park – 4.3 acres – 2600 Howe Avenue, north of El Camino Avenue: gazebo, memorial plaza, playground, basketball courts, and free play area.
4. Bohemian Park – 10.2 acres – 3131 Wright Street (corner of Wright & Yellowstone): gazebo, playground, tennis courts, basketball courts, picnic tables and barbecues, free play area, and creek area. The park acreage also includes three recently acquired parcels for future development, adjoining the north side of the park fronting Edison Avenue. One parcel is 0.66 acres of unimproved land; the second parcel is 0.67 acres with a residential duplex, and the third parcel is 0.66 acres with a residential fourplex.

5. Seely Park – 5.2 acres – 3000 Pope Avenue: playground, basketball court, picnic tables and barbecues, restrooms, and water splash park.
6. Creekside Nature Area – 1.9 acres – Located at the North East Corner of the former Creekside Elementary School (Assessor Parcel Numbers 268-0210-068, 268-0290-018, and 268-0210-051): Nature walk/open space area featuring native plants and foliage.
7. Cottage Park – 7.5 acres – 3097 Cottage Way: Playground, tot lot, swimming pool (lap/diving pool and slide), activity center (home of the Fulton-El Camino Pre-school, before and after school programs, and youth camps), open play area, picnic tables and barbecues, creek, and restrooms.

School Parks/Facilities

8. Cottage Elementary School – 2221 Morse Avenue: Strong Ranch Slough nature area and tennis courts in the southern portion of the school property.
9. Howe Elementary School – 2404 Howe Avenue: sport fields in the south eastern portion of the school property.

Assessment Background

The Park District is primarily funded by a portion of property taxes and existing assessments to fund capital improvements, maintenance and operations. In 2011 it was obvious that the general decline in local property values over the last several years had resulted in continued significant decreases to the District's property tax revenue. In addition, the assessment that began in 1991 needed to be modified to be brought into conformance with laws and legal decisions created or modified after 1991.

In response to these revenue decreases, coupled with the increasing operational costs including utility costs, the Park District reduced expenditures and personnel, and deferred needed maintenance, repairs, improvements and capital purchases. Nevertheless, the funding from the assessment from 1991 needed to be replaced, otherwise the Park District would be forced to further reduce park maintenance and postpone facilities upgrades, resulting in a continuing deterioration of park maintenance and facilities.

Assessment Process

In order to replace the 1991 assessment, in June and July of 2011, the Park District conducted an assessment ballot proceeding pursuant to the requirements of Article XIID of the California Constitution ("The Taxpayer's Right to Vote on Taxes Act") and the Landscaping the Lighting Act of 1972, and pursuant to the direction of the Board of Directors of the Fulton-El Camino Recreation and Park District (the "Board") on February 17, 2011 with resolution number 2011-05 that initiated the proceedings, and on May 17, 2011 with resolution number 2011-08 that directed the mailing of ballots on June 1, 2011.

During this ballot proceeding, property owners in the Park District were provided with a notice and ballot for the proposed "Parks Maintenance and Recreation Improvement District," the "Improvement District," or "Assessment # 1." A 45-day period was provided for balloting and a public hearing was conducted on July 21, 2011. At the public hearing, all ballots returned within the 45-day balloting period were tabulated.

It was determined at the public hearing that the assessment ballots submitted in opposition to the proposed assessments did not exceed the assessment ballots submitted in favor of the assessments (with each ballot weighted by the proportional financial obligation of the property for which ballot was submitted). The final balloting result was 68.43% weighted support from ballots returned.

As a result, the Board gained the authority to approve the levy of the assessments for fiscal year 2011-12 and to continue to levy them in future years. The authority granted by the ballot proceeding was for a maximum assessment rate of \$25 per single family home per year, increased each subsequent year by the Bay Area CPI (consumer price index) not to exceed 3% per annum. In the event that the annual change in the CPI exceeds 3%, any percentage change in excess of 3% can be cumulatively reserved and can be added to the annual change in the CPI for years in which the CPI change is less than 3%.

Engineer's Report and Continuation of Assessments

In each subsequent year for which the assessments will be continued, the Board must direct the preparation of an Engineer's Report, budgets and proposed assessments for the upcoming fiscal year. After the Engineer's Report is completed, the Board may preliminarily approve the Engineer's Report and proposed assessments, and establish the date for a public hearing on the continuation of the assessments. This Report was prepared pursuant to the direction of the Board on March 19, 2026 by resolution number 2025/26-17.

This Engineer's Report ("Report") was prepared to establish the budget for the continued improvements and services ("Improvements") that would be funded by the proposed fiscal year 2026-27 assessments, determine the benefits received by property from the park maintenance and improvements and services within the Park District, and the method of assessment apportionment to lots and parcels within the Park District. Including the authorized annual adjustments, the maximum authorized assessment rate for fiscal year 2026-27 is \$38.33 per benefit unit for Zone of Benefit Zone A, and \$19.17 per benefit unit for Zone of Benefit B. This Report and the proposed assessments have been made pursuant to the Landscaping and Lighting Act of 1972, Part 2 of Division 15 of the *California Streets and Highways Code* (the "Act") and Article XIII D of the California Constitution (the "Article").

If the Board approves this Engineer's Report and the continuation of the assessments by resolution, a notice of public hearing must be published in a local paper at least 10 days prior to the date of the public hearing. The resolution preliminarily approving the Engineer's Report and establishing the date for a public hearing is used for this notice.

Following the minimum 10-day time period after publishing the notice, a public hearing is held for the purpose of allowing public testimony about the proposed continuation of the assessments. This hearing is currently scheduled for July 16, 2026. At this hearing, the Board would consider approval of a resolution confirming the continuation of the assessments for fiscal year 2026-27. If so confirmed and approved, the assessments would be submitted to the County Auditor/Controller for inclusion on the property tax rolls for Fiscal Year 2026-27.

Legal Requirements

Proposition 218

This assessment was formed consistent with Proposition 218, The Right to Vote on Taxes Act, which was approved by the voters of California on November 6, 1996, and is now codified as Articles XIIC and XIID of the California Constitution. Proposition 218 provides for benefit assessments to be levied to fund the cost of providing services, improvements, as well as maintenance and operation expenses to a public improvement which directly benefits the assessed property.

Proposition 218 describes a number of important requirements, including property-owner balloting, for the imposition, increase and extension of assessments, and these requirements are satisfied by the process used to establish this assessment.

Silicon Valley Taxpayers Association, Inc. v Santa Clara County Open Space Authority

In July of 2008, the California Supreme Court issued its ruling on the Silicon Valley Taxpayers Association, Inc. v. Santa Clara County Open Space Authority ("SVTA"). This ruling is the most significant legal document in further legally clarifying Proposition 218. Several of the most important elements of the ruling included further emphasis that:

- Benefit assessments are for special, not general, benefit
- The services and/or improvements funded by assessments must be clearly defined
- Special benefits are directly received by and provide a direct advantage to property in the Improvement District
- The assessment paid by property should be proportional to the special benefits it receives from the Improvements

Dahms v. Downtown Pomona Property

On June 8, 2009, the 4th Court of Appeals amended its original opinion upholding a benefit assessment for property in the downtown area of the City of Pomona in Dahms v. Downtown Pomona Property ("*Dahms*"). On July 22, 2009, the California Supreme Court denied review. In Dahms the Court upheld an assessment that was 100% special benefit (i.e. 0% general benefit) on the rationale that the services and improvements funded by the assessments were directly provided to property in the assessment district. The Court also upheld discounts and exemptions from the assessment for certain properties.

Bonander v. Town of Tiburon

On December 31, 2009, in Bonander v. Town of Tiburon ("*Bonander*"), the 1st District Court of Appeal overturned a benefit assessment approved by property owners to pay for placing overhead utility lines underground in an area of the Town of Tiburon. The Court invalidated the assessments primarily on the grounds that the assessments had been apportioned to assessed property based on the costs within sub-areas of the assessment district instead of the overall cost of the improvements and the overall proportional special benefits.

Beutz v. County of Riverside

On May 26, 2010 the 4th District Court of Appeals issued a decision in Steven Beutz v. County of Riverside ("*Beutz*"). This decision overturned an assessment for park maintenance in Wildomar, California, primarily because the general benefits associated with improvements and services were not explicitly calculated, quantified and separated from the special benefits.

Golden Hill Neighborhood Association v. City of San Diego

On September 22, 2011, the San Diego Court of Appeal issued a decision on the Golden Hill Neighborhood Association v. City of San Diego appeal. This decision overturned an assessment for street and landscaping maintenance in the *Greater Golden Hill* neighborhood of San Diego, California. The court described two primary reasons for its decision. First, like in *Beutz*, the court found the general benefits associated with services were not explicitly calculated, quantified and separated from the special benefits. Second, the court found that the City had failed to record the basis for the assessment on its own parcels.

Compliance with Current Law

This Engineer's Report is consistent with the *SVTA* decision and with the requirements of Article XIII C and XIII D of the California Constitution because the Improvements to be funded are clearly defined; the benefiting property in the Improvement District enjoys close and unique proximity, access and views to the Improvements; the Improvements serve as an extension of usable land area for benefiting properties in the Improvement District and such special benefits provide a direct advantage to property in the Improvement District that is not enjoyed by the public at large or other property.

This Engineer's Report is consistent with *Beutz*, *Dahms* and *Greater Golden Hill* because, the Improvements directly benefit property in the Improvement District and the general benefits have been explicitly calculated, quantified and excluded from the Assessments. The Engineer's Report is consistent with *Bonander* because the Assessments have been apportioned based on the overall cost of the Improvements and proportional special benefit to each property, rather than the proportional cost to the District to provide the Improvements to specific properties.

Plans & Specifications

The Fulton-El Camino Recreation and Park District maintains park facilities in locations throughout its boundaries. The work and improvements (the “Improvements”) proposed to be undertaken by the Fulton-El Camino Recreation and Park District’s Parks Maintenance & Recreation Improvement District (the “Improvement District”) and the cost thereof paid from the levy of the annual Assessment provide special benefit to Assessor Parcels within the Improvement District as defined in the Method of Assessment herein. In addition to the definitions provided by the Landscaping and Lighting Act of 1972, (the “Act”) the work and improvements are generally described as follows:

Installation, maintenance and servicing of public recreational facilities and improvements, including, but not limited to, turf and play areas, landscaping, ground cover, shrubs and trees, irrigation systems, drainage systems, lighting, fencing, entry monuments, basketball courts, tennis courts, gymnasium, senior center, running tracks, swimming pools, other recreational facilities, graffiti removal and repainting, and labor, materials, supplies, utilities and equipment, as applicable, at each of the locations owned, operated or maintained by the Fulton-El Camino Recreation and Park District. Plans and specifications for these improvements have been filed with the General Manager of the Fulton-El Camino Recreation and Park District and are incorporated herein by reference.

As applied herein, “Installation” means the construction of recreational improvements, including, but not limited to, land preparation (such as grading, leveling, cutting and filling), sod, landscaping, irrigation systems, sidewalks and drainage, lights, playground equipment, play courts, playing fields, recreational facilities and public restrooms.

“Maintenance” means the furnishing of services and materials for the ordinary and usual maintenance, operation and servicing of any improvement, including repair, removal or replacement of all or any part of any improvement; providing for the life, growth, health, and beauty of landscaping, including cultivation, irrigation, trimming, spraying, fertilizing, or treating for disease or injury; the removal of trimmings, rubbish, debris, and other solid waste, and the cleaning, sandblasting, and painting of walls and other improvements to remove or cover graffiti.

“Servicing” means the furnishing of electric current, or energy, gas or other illuminating agent for any public lighting facilities or for the lighting or operation of any other improvements; or water for the irrigation of any landscaping, the operation of any fountains, or the maintenance of any other improvements.

Incidental expenses include all of the following: (a) The costs of preparation of the report, including plans, specifications, estimates, diagram, and assessment; (b) the costs of printing, advertising, and the giving of published, posted, and mailed notices; (c) compensation payable to the County for collection of assessments; (d) compensation of any engineer or attorney employed to render services in proceedings pursuant to this part; (e) any other expenses incidental to the construction, installation, or maintenance and servicing of the Improvements; (f) any expenses incidental to the issuance of bonds or notes pursuant to Streets & Highways Code Section 22662.5; and (g) costs associated with any elections held for the approval of a new or increased assessment. (Streets & Highways Code §22526).

The assessment proceeds will be exclusively used for Improvements within the Improvement District plus Incidental expenses. Reference is made to the District’s Improvement Plans which specifically identifies the parks, recreation areas and other sites to be funded by the assessment proceeds and to the plans and specifications, including specific expenditure and Improvement plans by park/recreation site, which are on file with the District.

Fiscal Year 2026-27 Estimate of Cost and Budget

Introduction

Following are the proposed Improvements for the Improvement District. Improvements funded by the Assessments will be used to maintain and improve existing parks within the Improvement District. As previously explained, the baseline level of service was declining due to revenue decreases and cost increases. Improvements funded by the Assessments are over and above the baseline level of service that would exist in the District, absent a new assessment or alternative new revenue source. The formula below describes the relationship between the final level of Improvements, the existing baseline level of service, and the final level of improvements to be funded by the Assessments (Assessment # 1).

Budget for Fiscal Year 2026-27

The following budget shows the cost of the Improvements that will be funded by the Improvement District in Fiscal Year 2026-27.

Table 1 – Estimate of Costs – Fiscal Year 2026-27

Maintenance, Service and Capital Expenditures ¹	
Salaries and Employee Benefits	\$1,204,071
Services and Supplies	\$792,095
Capital Outlay	\$0
Loan Redemption	\$0
Total Maintenance, Service and Capital Expenditures	\$1,996,166
Incidental Expenses	
Assessment Collection, Professional Services and Administration ²	<u>\$13,634</u>
Total Maintenance, Service and Capital Expenditures	\$2,009,800
Total Benefit of Improvements	\$2,009,800
Single Family Equivalent Units (SFEs)	13,026
Benefit Received per SFE Unit	\$154.29
Less:	
District Contribution from Other Sources for General Benefit ³	(\$499,041)
District Contribution from Other Sources toward Special Benefit ³	<u>(\$1,011,467)</u>
Total District Contribution from Other Sources	<u>(\$1,510,508)</u>
Net Cost Maintenance, Service and Capital	\$499,292
Budget Allocation to Property ⁴	
Total Assessment Budget ⁵	\$499,292
Single Family Equivalent Benefit Units - Zone A	<u>12,756</u>
Single Family Equivalent Benefit Units - Zone B	<u>540</u>
Total Single Family Equivalent Benefit Units (Zone A + 50% of Zone B)	13,026
Assessment per Single Family Equivalent Unit	\$38.33

Notes to Estimate of Costs:

The item Maintenance, Service and Capital Expenditures includes the operation and maintenance of Improvements, and will provide funding for enhanced maintenance of all parks and recreation facilities on a daily basis, seven days per week. Improvements will include mowing turf, trimming and caring for landscaping, fertilization and aeration of grounds and playfields, routine maintenance and safety inspections, painting, replacing/repairing broken or damaged equipment, trash removal and cleanup, irrigation and irrigation system maintenance, and other services as needed.

Estimated fiscal year 2026-27 incidental costs includes legal fees, assessment administration, county charges for inclusion of assessments on property tax bills, publication of legal notices, and other incidental costs.

As determined in the following section, at least 25% of the cost of Improvements must be funded from sources other than the assessments to cover any general benefits from the Improvements. Therefore, out of the total cost of Improvements of \$1,996,166, the District must contribute at least \$499,041 from sources other than the assessments. The District will contribute \$1,510,508 which more than covers any general benefits from the Improvements. These non-assessment revenues include property taxes, grants, recreation fees, landscaping services fees, water rebilling fees, vehicle code fines, citation/security revenue, picnic rentals, and other miscellaneous reimbursements.

The Act requires that proceeds from the assessments must be deposited into a special fund that has been set up for the revenues and expenditures of the Improvement District. Moreover, funds raised by the assessment shall be used only for the purposes stated within this Report. Any balance remaining at the end of the fiscal year, July 1, must be carried over to the next fiscal year. The District may also establish a reserve fund for contingencies and special projects as well as a capital improvement fund for accumulating funds for larger capital improvement projects or capital renovation needs. Any remaining balance would either be placed in the reserve fund, the capital improvement fund, or would be used to reduce future years' assessments.

The Total Assessment Budget is the sum of the final property assessments rounded to the lower even penny to comply with the County Auditor's levy submission requirements; therefore the budget amount may slightly differ from the assessment total.

Method of Assessment Apportionment

Method of Apportionment

This section of the Engineer's Report includes an explanation of the special and general benefits to be derived from the Improvements to park facilities and District maintained property, throughout the proposed Improvement District, and the methodology used to apportion the total proposed assessment to properties within the Improvement District.

The method used for apportioning the assessment is based upon the proportional special benefits conferred to the properties over and above the general benefits conferred to real property in the Improvement District or to the public at large. Special benefit and the Assessments are calculated for each parcel in the Improvement District using the following process:

1. Identification of special benefit factors derived from the Improvements
2. Calculation and quantification of the general benefits
3. Determination of the relative special benefit within different areas within the Assessment District
4. Determination of the relative special benefit per property type
5. Apportionment of the costs to Assessment and calculation of the Assessment for each individual parcel based upon special benefit; location, property type, property size, property characteristics, improvements on property and other supporting attributes.

Discussion of Benefit

Assessments can only be levied based on the special benefit to property. This special benefit is received by property over and above any general benefits. Any and all general benefit must be funded from another source. With reference to the requirements for assessments, Section 22573 of the Landscaping and Lighting Act of 1972 states:

"The net amount to be assessed upon lands within an assessment district may be apportioned by any formula or method which fairly distributes the net amount among all

assessable lots or parcels in proportion to the estimated benefits to be received by each such lot or parcel from the improvements."

"The determination of whether or not a lot or parcel will benefit from the improvements shall be made pursuant to the Improvement Act of 1911 (Division 7 (commencing with Section 5000)) [of the Streets and Highways Code, State of California]."

Proposition 218, as codified in Article XIID of the California Constitution, has confirmed that assessments must be based on the special benefit to property and that the value of the special benefits must reasonably exceed the cost of the assessment:

"No assessment shall be imposed on any parcel which exceeds the reasonable cost of the proportional special benefit conferred on that parcel."

Since assessments are levied on the basis of special benefit, they are not a tax and are not governed by Article XIII A of the California Constitution.

The SVTA decision also clarifies that a special benefit is a service or improvement that provides a direct advantage to a parcel and that indirect or derivative advantages resulting from the overall public benefits from a service or improvement are general benefits. The SVTA decision also provides specific guidance that park improvements are a direct advantage and special benefit to property that is proximate to a park that is improved by an assessment:

The characterization of a benefit may depend on whether the parcel receives a direct advantage from the improvement (e.g. proximity to a park) or receives an indirect, derivative advantage resulting from the overall public benefits of the improvement (e.g. general enhancement of the district's property values).

Finally, Proposition 218 twice uses the phrase "over and above" general benefits in describing special benefit. (Art. XIID, sections 2(i) & 4(f).) The SVTA decision further clarifies that special benefits must provide a direct advantage to benefiting property and that proximity to a park is an example of a special benefit.

Benefit Factors

The special benefits from the Improvements increase the utility, functionality and desirability of these properties and are listed below:

Proximity to improved parks and recreational facilities

Only the specific properties within close proximity to the Improvements are included in the proposed Improvement District. The Improvement District was narrowly drawn to include only the benefiting parcels. Therefore, property in the Improvement District enjoys unique and valuable proximity (and access, as described in the next section) to the Improvements that the public at large and property outside the Improvement District do not share.

In absence of the proposed Assessments, the Improvements would not be provided and the parks and recreation areas in the Improvement District will be degraded due to insufficient funding for maintenance, upkeep and repair. Therefore, the Assessments provide Improvements that are over and above what otherwise would be provided. Improvements that are over and above what would otherwise be provided do not by themselves translate into special benefits but when combined with the unique proximity and access enjoyed by parcels in the Improvement District, they provide a direct advantage and special benefit to property in the Improvement District.

Access to improved parks, open space and recreational areas

Since the parcels in the proposed Improvement District are nearly the only parcels that enjoy close access to the Improvements, they directly benefit from the unique close access to improved parks, open space and recreation areas that are provided by the Assessments. This is a direct advantage and special benefit to property in the Improvement District.

Improved views

The proposed Improvement District, by maintaining the landscaping at its parks, recreation and open space facilities, provides improved views of the Improvements to the proximate properties within the Improvement District. Therefore, the improved and protected views provided by the Assessments are another direct and tangible advantage that is uniquely conferred upon property in the Improvement District.

Extension of a property's outdoor areas and green spaces for properties within close proximity to the Improvements

In large part because it is cost prohibitive to provide large open land areas on property in the proposed Improvement District, the residential, commercial and other benefiting properties in the Improvement District do not have large outdoor areas and green spaces. The parks in the Improvement District provide these larger outdoor areas that serve as an effective extension of the land area for proximate properties because the Improvements are uniquely proximate and accessible to property in close proximity to the Improvements. The Improvements, therefore, provide an important, valuable and desirable extension of usable land area and neighborhood-serving amenities for the direct advantage and special benefit of properties with good and close proximity to the Improvements.

According to the industry-standard guidelines established by the National Park and Recreation Association (the "NPRA"), neighborhood parks in urban areas have a service area radius of generally one-half mile and community parks in urban areas have a service area radius of approximately two miles. The service radii for neighborhood parks and neighborhood green spaces were specifically established to give all properties within the service radii close proximity and easy walking access to such public land areas. Since proximate and accessible parks serve as an extension of the usable land area for property in the service radii and since the service radii was specifically designed to provide close proximity and access, the parcels within this service area clearly receive a direct advantage and special benefit from the Improvements, and this advantage is not received by other properties or the public at large.

An analysis of the service radii for the Improvements finds that all properties in the Improvement District enjoy the distinct and direct advantage of being close and proximate to park sites within the Improvement District. The benefiting properties in the Improvement District therefore uniquely and specially benefit from the Improvements.

Benefit Finding

In summary, real property located within the boundaries of the Improvement District distinctly and directly benefits from the effectively extended outdoor areas and green spaces; as well as closer proximity, access and views of improved parks, recreation facilities, landscaping, trail systems and other public resources funded by the Assessments. The Improvements are specifically designed to serve local properties in the Improvement District, not other properties or the public at large. The public at large and other properties outside the Improvement District receive only limited benefits from the Improvements because they do not have proximity, good access or views of the Improvements. These are special benefits to property in the Improvement District in much the same way that sewer and water facilities, sidewalks and paved streets enhance the utility and desirability of property and make them more functional to use, safer and easier to access.

General versus Special Benefit

Article XIID, Section 4(a) of the California Constitution requires any local agency proposing to increase or impose a benefit assessment to “separate the general benefits from the special benefits conferred on a parcel.” The rationale for separating special and general benefits is to ensure that property owners subject to the benefit assessment are not paying for general benefits. Property may be assessed to fund improvements to the extent of the special benefits conferred by the Improvements; but general benefits are not assessable. Accordingly, a separate estimate of the special and general benefit is given in this section.

Article XIID never defines the term “general benefit.” The definition of special benefit in Section 2(i) includes the statement that general enhancement of property value does not constitute special benefit. SVTA expands somewhat on this idea by stating that general benefit may be described as “an indirect, derivative advantage” resulting from the improvements. One infers from Article XIID that all benefit is either general or special.

In other words:

Total Benefit	=	General Benefit	+	Special Benefit
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There is no widely-accepted or statutory formula for quantifying the amount of any general benefit that is identified.

In this Report, the general benefit is first identified, conservatively (i.e. generously) estimated, and then budgeted so that it is funded by sources other than the Assessment.

The starting point for evaluating general and special benefits is the current, baseline level of service. The Assessment #1 funds Improvements “over and above” this general, baseline level and the general benefits estimated in this section are over and above the baseline.

A formula to estimate the general benefit is listed below:

General Benefit	=	Benefit to Real Property Outside the Assessment District	+	Benefit to Real Property Inside the Assessment District that is Indirect and Derivative	+	Benefit to the Public at Large
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Special benefit, on the other hand, is defined in the state constitution as “a particular and distinct benefit over and above general benefits conferred on real property located in the district or to the public at large.” The SVTA decision indicates that a special benefit is conferred to a property if it “receives a direct advantage from the improvement (e.g., proximity to a park).” In this proposed Assessment, as noted, properties in the Improvement District have close and unique proximity, views and access to the Improvements, and uniquely improved desirability from the Improvements, and other properties and the public at large do not receive significant benefits because they do not have proximity, access or views of the Improvements. Therefore, the overwhelming proportion of the benefits conferred to property is special, and only minimal general benefit is received by property outside the Improvement District or the public at large.

In the 2010 *Beutz* case, the 4th Appellate Court rejected an assessment for parks in large part because the general benefits were not calculated and quantified. In its decision, the 4th Appellate Court suggests that the use of parks in an assessment district by people who live outside of the district likely is a general benefit. This Engineer's Report includes a specific, quantified calculation of general benefits, as described below, that is based in part on such use by people outside of the Improvement District. Moreover, the proportionality of the Assessments to the special benefits received by each parcel, based in large part on proximity is established as well. Therefore, the Assessments and this Engineer's Report are consistent with the *Beutz* decision.

Calculating General Benefit

In this section, the general benefit is conservatively estimated and described, and then budgeted so that it is funded by sources other than the Assessment.

Benefit to Property Outside the Proposed Improvement District

Properties within the proposed Improvement District receive almost all of the special benefits from the Improvements, because properties in the Improvement District enjoy unique close proximity and access to the Improvements that is not enjoyed by other properties or the public at large. However, certain properties outside the boundaries of the District but within the proximity/access radius of the Improvements and that do not lack access due to obstacles such as railroads or major roadways, may receive some benefit from the Improvements. The amount of benefit conferred to properties just outside the Improvement District boundaries, must be deducted from the total benefit and not assessed to property in the Improvement District.

A 50% reduction factor is applied to the benefit received by these properties because they are all geographically on only one side of the Improvements and are over twice the average distance from the Improvements compared to properties in the Improvement District. The benefit to property outside of the Improvement District is calculated as follows with the parcel and data analysis performed by SCI Consulting Group.

Assumptions:

609 parcels outside the District but within either 0.5 miles of a park within the Improvement District

7,391 parcels in the Improvement District.

50% relative benefit compared to property within the Improvement District.

Calculation of General Benefit to Property Outside the Improvement District

$$(609 / (7,391 + 609)) * 0.5 = 3.8\%$$

Although it can reasonably be argued that Improvements inside, but near the Improvement District boundaries are offset by similar park and recreational improvements provided outside, but near the Improvement District's boundaries, we use the more conservative approach of finding that 3.8% of the Improvements may be of general benefit to property outside the Improvement District.

Benefit to Property Inside the District that is Indirect and Derivative

The "indirect and derivative" benefit to property within the Improvement District is particularly difficult to calculate. A solid argument can be presented that all benefit within the Improvement District is special, because the Improvements are clearly "over and above" and "particular and distinct" when compared with the baseline level of service and the unique proximity, access and views of the Improvements enjoyed by benefiting properties in the Improvement District.

Nevertheless, the SVTA decision indicates there may be general benefit "conferred on real property located in the district." A measure of the general benefits to property within the Assessment area is the percentage of land area within the Improvement District that is publicly owned and used for regional purposes such as major roads, rail lines and other regional facilities because such properties used for regional purposes could provide indirect benefits to the public at large. Approximately 2.6% of the land area in the Improvement District is used for such regional purposes, so this is a measure of the general benefits to property within the Improvement District.

Benefit To The Public At Large

The general benefit to the public at large can be estimated by the proportionate amount of time that the proposed Improvement District's parks and recreational facilities are used and enjoyed by individuals who are not residents, employees, customers or property owners in the proposed Improvement District. Based on surveys and research conducted by SCI, less than 5% of the use of similar parks and recreation areas is by the public at large. When people outside the Improvement District use parks, they diminish the availability of parks for people within the Improvement District. Therefore, another 5% of general benefits are allocated for people within the Improvement District. Combining these two measures of general benefits, we find that 10% of the benefits from the Improvements are general benefits to the public at large.

Total General Benefits

Using a sum of these three measures of general benefit, we find that approximately 16.4% of the benefits conferred by the Improvements may be general in nature and should be funded by sources other than the Assessment.

General Benefit Calculation

3.8%	(Outside the Assessment District)
+ 2.6%	(Property within the Assessment District)

Although this analysis finds that 16.4% of the Assessment may provide general benefits, the Assessment Engineer establishes a requirement for a minimum contribution from sources other than the Assessments of 25%. This additional allocation above the measure of general benefits will serve to provide additional coverage for any other general benefits.

The Improvement District's total budget for maintenance and improvement of its parks and recreational facilities is \$1,996,166. Of this total budget amount, the District will contribute \$1,510,508 from sources other than the Assessments for park maintenance and operation. This contribution by the District equates to approximately 76% of the total budget for maintenance and improvements, and constitutes far more than the amount attributable to the general benefits from the Improvements.

Zones of Benefit

The boundaries of the Improvement District have been carefully drawn to only include the properties in Fulton-El Camino Recreation and Park District that are proximate to the proposed Improvements and that would materially benefit from the Improvements. Certain other properties surrounding the District were excluded from the proposed Improvement area because these properties are generally less proximate to the Improvements. In other words, the boundaries of the Improvement District have been narrowly drawn to include only properties that will specially benefit from the proposed Improvements, and would receive a declining level of service if the Assessments were not approved.

The SVTA decision indicates:

In a well-drawn district — limited to only parcels receiving special benefits from the improvement — every parcel within that district receives a shared special benefit. Under section 2, subdivision (i), these benefits can be construed as being general benefits since they are not “particular and distinct” and are not “over and above” the benefits received by other properties “located in the district.”

We do not believe that the voters intended to invalidate an assessment district that is narrowly drawn to include only properties directly benefitting from an improvement. Indeed, the ballot materials reflect otherwise. Thus, if an assessment district is narrowly drawn, the fact that a benefit is conferred throughout the district does not make it general rather than special. In that circumstance, the characterization of a benefit may depend on whether the parcel receives a direct advantage from the improvement (e.g., proximity to park) or receives an indirect, derivative advantage resulting from the overall public benefits of the improvement (e.g., general enhancement of the district's property values).

In the Improvement District, the advantage that each parcel receives from the Improvements is direct, and the boundaries are narrowly drawn to include only parcels that benefit from the Assessment. Therefore, the even spread of assessment throughout the narrowly drawn district is indeed consistent with the OSA decision. For the most part, the benefits from the Improvements within the Improvement District do not vary further based on proximity of the parcels to the Improvements because the increased benefits of greater proximity to the Improvements are generally offset by a parallel increase in negative factors such as higher levels of traffic, noise, etc. that comes with increased proximity.

However, in order to most conservatively assure that Assessments are proportional to the relative level of special benefits in the Improvement District, the district has been divided into two zones. Zone of Benefit A (or "Zone A") consists of all of the parcels in the District, with the exception of those parcels in Zone of Benefit B (or "Zone B"), as described below. Zone B consists of those parcels in the far northeastern portion of the District that are outside or near the border of the NPRA park service radii, and are separated from the rest of the District by roads. A 50% reduction factor is applied to these properties because they are all geographically on only one side of the Improvements and are over twice the average distance from the Improvements compared to properties in the rest of the Improvement District. Due to their still good but somewhat diminished proximity to the Improvements, properties in Zone B receive only 50% of the benefit received by the parcels in Zone A.

Consequently, since all parcels in each Zone of Benefit have good access and proximity to the Improvements and the benefits to relatively closer proximity are offset by other factors, the benefit is equal for equivalent parcels within a Zone of Benefit.

Method of Assessment

As previously discussed, the Assessments provide comprehensive Improvements that clearly confer special benefits to properties in the proposed Improvement District. The allocation of special benefits to property is partially based on the type of property and the size of property. These benefits can also partially be measured by the occupants on property in the Improvement District because such parcel population density is a measure of the relative benefit a parcel receives from the Improvements. It should be noted that many other types of "traditional" assessments also use parcel population densities to apportion the assessments. For example, the assessments for sewer systems, roads and water systems are typically allocated based on the population density of the parcels assessed. Therefore, the apportionment of benefit is reasonably based on the type of parcel, the size of parcels and the population density of parcels.

The next step in apportioning assessments is to determine the relative special benefit for each property. This process involves determining the relative benefit received by each property in relation to a single family home, or, in other words, on the basis of Single Family Equivalents (SFE). This SFE methodology is commonly used to distribute assessments in proportion to estimated special benefit and is generally recognized as providing the basis for a fair and appropriate distribution of assessments. For the purposes of this Engineer's Report, all properties are designated a SFE value, which is each property's relative benefit in relation to a single family home on one parcel. In this case, the "benchmark" property is the single family detached dwelling which is one Single Family Equivalent or one SFE.

In the process of determining the appropriate method of assessment, the Engineer considered various alternatives. For example, an assessment only for all residential improved property was considered but was determined to be inappropriate because commercial, industrial and other properties also receive direct benefits from the Improvements.

Moreover, a fixed or flat assessment is proposed for all single family residential properties regardless of use or parcel size. Assessments on multifamily residential parcels vary based on the number of dwelling units. Assessments on commercial and industrial property are levied on an acreage basis because larger properties generally support larger buildings and have higher numbers of employees, customers and guests who would benefit from proximity and improved access to well-maintained and improved parks and recreational facilities.

Finally, the special benefits to be derived from the Assessments are conferred on property and are not based on a specific property owner's use of the improvements, or a specific property owner's occupancy of property or the property owner's demographic status such as age or number of dependents. However, it is ultimately people who value the special benefits described above and use and enjoy the Improvement District's park and recreational facilities. In other words, the benefits derived to property are related to the average number of people who could potentially live on, work at, or otherwise could use a property, not how the property is currently used by the present owner. Therefore, the number of people who could or potentially live on, work at or otherwise use a property is one indicator of the relative level of benefit received by a property.

In conclusion, the Assessment Engineer determined that the appropriate method of assessment apportionment should be based on the type and use of property, the relative size of the property, property location, its relative population and usage potential and its proximity to parks and recreational facilities. This method is further described below.

Residential Properties

Certain residential properties in the proposed Improvement District that contain a single residential dwelling unit are assigned one Single Family Equivalent or 1.0 SFE. Traditional houses, zero-lot line houses and town homes are included in this category of single family residential property.

Properties with more than one residential unit are designated as multi-family residential properties. These properties benefit from the improvements in proportion to the number of dwelling units that occupy each property and the average number of people who reside in multi-family residential units versus the average number of people who reside in a single family home. The population density factors for the Park Maintenance and Recreation Improvement District, as depicted below, provide the basis for determining the SFE factors for residential properties. Using the total population in a certain property type in the area of the Improvement District from the 2000 Census (the most recent data available when this Assessment was established) and dividing it by the total number of such households, finds that approximately 2.44 persons occupy each single family residence, whereas an average of 1.96 persons occupy each multi-family residence. Using the ratio of one SFE for each single-family residence, which equates to one SFE for every 2.44 persons, 0.80 SFE would equate to one multi-family unit or 0.80 SFE for every 1.96 residents. Likewise, each condominium unit receives 0.85 SFE, each duplex, triplex, fourplex receives 0.80 SFE, and each mobile home receives 0.85 SFE.

Table 2 – Residential Density and Assessment Factors

<i>Type of Residential Land Use</i>	<i>Total Population</i>	<i>Occupied Households</i>	<i>Persons per Household</i>	<i>Proposed Rate</i>
Single Family Residential	50,434	20,706	2.44	1.00
Condominium	5,781	2,795	2.07	0.85
Multi-Family Residential (2+ Units)	37,388	19,089	1.96	0.80
Mobile Home on Separate Lot	526	254	2.07	0.85

The single family equivalency factor of 0.80 per dwelling unit for multifamily residential properties applies to such properties with 20 or fewer units. Properties in excess of 20 units typically offer on-site recreational amenities and other facilities that tend to offset some of the benefits provided by the improvements. Therefore the benefit for properties in excess of 20 units is determined to be 0.80 SFE per unit for the first 20 units and 0.10 SFE per each additional unit in excess of 20 dwelling units.

Commercial/Industrial Properties

SFE values for commercial and industrial land uses are based on the equivalence of special benefit on a land area basis between single family residential property and the average commercial/industrial property. The SFE values for various commercial and industrial land uses are further defined by using average employee densities because the special benefit factors described previously can be measured by the average number of people who work at commercial/industrial properties.

In order to determine employee density factors, the findings from the San Diego Association of Governments Traffic Generators Study (the “SANDAG Study”) are used because these findings were approved by the State Legislature as being a good representation of the average number of employees per acre of land area for commercial and industrial properties. As determined by the SANDAG Study, the average number of employees per acre for commercial and industrial property is 24.

In comparison, the average number of people residing in a single family home in the area is 2.44. Since the average lot size for a single family home in the Park District is approximately 0.25 acres, the average number of residents per acre of residential property is 9.76.

The employee density per acre is generally 2.4 times the population density of single family residential property per acre (24 employees per acre / 9.76 residents per acre). Therefore, the average employee density can be used as the basis for allocating benefit to commercial or industrial property since a commercial/industrial property with 2.4 employees receives generally similar special benefit to a residential property with 1 resident. This factor of equivalence of benefit between 1 resident to 2.4 employees is the basis for allocating commercial/industrial benefit. Table 3 below shows the average employees per acre of land area or portion thereof for commercial and industrial properties and lists the relative SFE factors per quarter acre for properties in each land use category.

Commercial and industrial properties in excess of 6 acres generally involve uses that are more land intensive relative to building areas and number of employees (lower coverage ratios). As a result, the benefit factors for commercial and industrial property land area in excess of 6 acres is determined to be the SFE rate per quarter acre for the first 6 acres and the relevant SFE rate per each additional acre over 6 acres.

Institutional properties that are used for residential, commercial or industrial purposes are also assessed at the appropriate residential, commercial or industrial rate.

Table 3 – Commercial/Industrial Density and Assessment Factors

<i>Type of Commercial/Industrial Land Use</i>	<i>Average Employees per Acre</i>	<i>SFE Units per 1/4 Acre</i>
Commercial	24	1.00
Office	68	2.83
Shopping Center	24	1.00
Industrial	24	1.00
Self Storage or Parking Lot	1	0.04

1. Source: San Diego Association of Governments Traffic Generators Study.
2. The SFE factors for commercial and industrial parcels are applied by the quarter acre of land area or portion thereof. (Therefore, the minimum assessment for any assessable parcel in these categories is the SFE Units listed herein.)

Other Properties

Article XIIID stipulates that publicly owned properties must be assessed unless there is clear and convincing evidence that those properties receive no special benefit from the Assessment.

All properties that are specially benefited are assessed. Other publicly owned property that is used for purposes similar to private residential, commercial, industrial or institutional uses is benefited and assessed at the same rate as such privately owned property.

Vacant, miscellaneous, small and other parcels such as roads, right-of-way parcels, and common areas typically do not generate significant numbers of employees, residents, customers or guests, and have limited economic value. These miscellaneous parcels receive minimal benefit from the Improvements and are assessed an SFE benefit factor or 0 SFEs.

Annual Cost Indexing

It should also be noted that the maximum assessment rate within the Improvement District may increase in future years based on the annual change in the Northern California (San Francisco Bay Area) Consumer Price Index (the “CPI”), with a maximum annual adjustment not to exceed 3%.

Appeals of Assessments Levied to Property

Any property owner who feels that the assessment levied on the subject property is in error as a result of incorrect information being used to apply the foregoing method of assessment may file a written appeal with the Fulton-El Camino Recreation and Park District Engineer or his or her designee. Any such appeal is limited to correction of an assessment during the then current fiscal year and applicable law. Upon the filing of any such appeal, the District Engineer or his or her designee will promptly review the appeal and any information provided by the property owner. If the District Engineer or his or her designee finds that the assessment should be modified, the appropriate changes shall be made to the Assessment Roll. If any such changes are approved after the Assessment Roll has been filed with the County for collection, the District Engineer or his or her designee is authorized to refund to the property owner the amount of any approved reduction. Any dispute over the decision of the District Engineer or his or her designee shall be referred to the Board of Directors of the Fulton-El Camino Recreation and Park District, and the decision of the Board shall be final.

Assessment Funds Must Be Expended Within the Improvement District Area

The net available Assessment funds, after incidental, administrative, financing and other costs, shall be expended exclusively for Improvements within the boundaries of the Assessment District and appropriate incidental and administrative costs as defined in the Plans and Specifications section.

Duration of Assessment, Oversight, Annual Review and Accountability

It is proposed that the Assessment be levied for fiscal year 2011-12 and continued every year thereafter, so long as the parks and recreational areas need to be improved and maintained and the Fulton-El Camino Recreation and Park District requires funding from the Assessments for its Improvements in the Improvement District.

The Assessment proceeds and expenditures are audited annually by an independent auditing entity. The results of the audit are reviewed publicly at a public meeting of the District. The Assessment proceeds and expenditures are also reviewed and overseen by the publicly elected District Board. In addition, the Assessment budget, Assessment rate, Assessment CPI increase, and proposed Improvements are reviewed at a noticed public hearing by the Board and public.

In general, the public review and accountability process is as follows: The Assessments do not continue automatically, and require specific actions, reports and procedures for continuation. In each subsequent year for which the Assessments will be levied, the Board must preliminarily approve at a public meeting a budget and costs for the upcoming fiscal year's Enhanced Services, an updated annual Engineer's Report, and an updated Assessment roll listing all parcels and their proposed Assessments. At this meeting, the Board will also call for the publication in a local newspaper of a legal notice of the intent to continue the Assessments for the next fiscal year and set the date for the noticed public hearing. At the annual public hearing, members of the public can provide input to the Board prior to the Board's decision on ordering the Improvements and the Assessments for the next fiscal year.

Assessment

WHEREAS, on March 19, 2026 the Governing Board (the "Board") of the Fulton-El Camino Recreation and Park District (the "District") adopted its Resolution No. 2025/26-17 initiating proceedings for the continuation of Assessments within the Improvement District for the Fulton-El Camino Recreation and Park District, County of Sacramento, California, pursuant to the provisions of the Landscaping and Lighting Act of 1972 and Article XIID of the California Constitution (collectively "the Act"), and to proceed with the proposed levy of Assessments;

WHEREAS, the Resolution directed the undersigned Engineer of Work to prepare and file a report presenting an estimate of costs, a diagram for the Improvement District and an assessment of the estimated costs of the Improvements upon all assessable parcels within the Improvement District;

NOW, THEREFORE, the undersigned, by virtue of the power vested in me under the Act, Article XIID of the California Constitution, and the order of the Board of the Fulton-El Camino Recreation and Park District, hereby make the following assessment to cover the portion of the estimated cost of the Improvements, and the costs and expenses incidental thereto to be paid by the Improvement District.

The amount to be paid for said Improvements and the expense incidental thereto, to be paid by the Improvement District for the fiscal year 2026-27 is generally as follows:

Table 4 – Summary Cost Estimate for Fiscal Year 2026-27

Maintenance, Service and Capital Expenditures	\$1,996,166
Incidental Expenses	<u>\$13,634</u>
TOTAL BUDGET	\$2,009,800
District Contribution from Other Sources	<u>(\$1,510,508)</u>
NET AMOUNT TO ASSESSMENTS	\$499,292

As required by the Act, an Assessment Diagram showing the exterior boundaries of the Improvement District is hereto attached and incorporated herein by reference. The distinctive number of each parcel or lot of land in the Improvement District is its Assessor Parcel Number appearing on the Assessment Roll.

I do hereby assess and apportion the net amount of the cost and expenses of the Improvements, including the costs and expenses incident thereto, upon the parcels and lots of land within the Improvement District, in accordance with the special benefits to be received by each parcel or lot, from the Improvements, and more particularly set forth in the Estimate of Cost and Method of Assessment in the Report.

The Assessment is made upon the parcels or lots of land within the Improvement District in proportion to the special benefits to be received by the parcels or lots of land, from the Improvements.

Property owners in the Improvement District approved in an assessment ballot proceeding in 2011 the initial fiscal year benefit assessment for special benefits to their property including the CPI adjustment schedule. As a result, the assessment may continue to be levied annually and may be increased by up to the maximum annual CPI increase without any additional assessment ballot proceeding. In the event that in future years the assessments are levied at a rate less than the maximum authorized assessment rate, the assessment rate in a subsequent year may be increased up to the maximum authorized assessment rate without any additional assessment ballot proceeding.

The Assessment is subject to an annual adjustment tied to the Consumer Price Index-U for the Northern California (San Francisco Bay Area) as of December of each succeeding year (the "CPI"), with a maximum annual adjustment not to exceed 3%. Any change in the CPI in excess of 3% shall be cumulatively reserved as the "Unused CPI" and shall be used to increase the maximum authorized assessment rate in years in which the CPI is less than 3%. The maximum authorized assessment rate is equal to the maximum assessment rate in the first fiscal year the Assessment was levied adjusted annually by the minimum of 1) 3% or 2) the change in the CPI plus any Unused CPI as described above.

The change in the CPI from December 2024 to December 2025 was 3.03%, and the Unused CPI carried over from the previous fiscal year was 2.69%. Therefore, the maximum authorized assessment rate for fiscal year 2026-27 is increased by 3.00% which equates to \$38.33 per single family equivalent benefit unit for Zone A and \$19.17 per single family equivalent benefit unit for Zone B. The estimate of cost and budget in this Engineer's Report proposes Assessments for fiscal year 2026-27 at the rates of \$38.33 for Zone A and \$19.17 for Zone B, which are the maximum authorized assessment rates.

Each parcel or lot of land is described in the Assessment Roll by reference to its parcel number as shown on the Assessor's Maps of the County of Sacramento for the fiscal year 2026-27. For a more particular description of the property, reference is hereby made to the deeds and maps on file and of record in the office of the County Recorder of the County.

I hereby place opposite the Assessor Parcel Number for each parcel or lot within the Assessment Roll, the amount of the assessment for the fiscal year 2026-27 for each parcel or lot of land within the Improvement District.

Dated: July 16, 2026

Engineer of Work



By

A handwritten signature in blue ink, appearing to read "John W. Bliss", written over a horizontal line.

John W. Bliss, License No. C052091

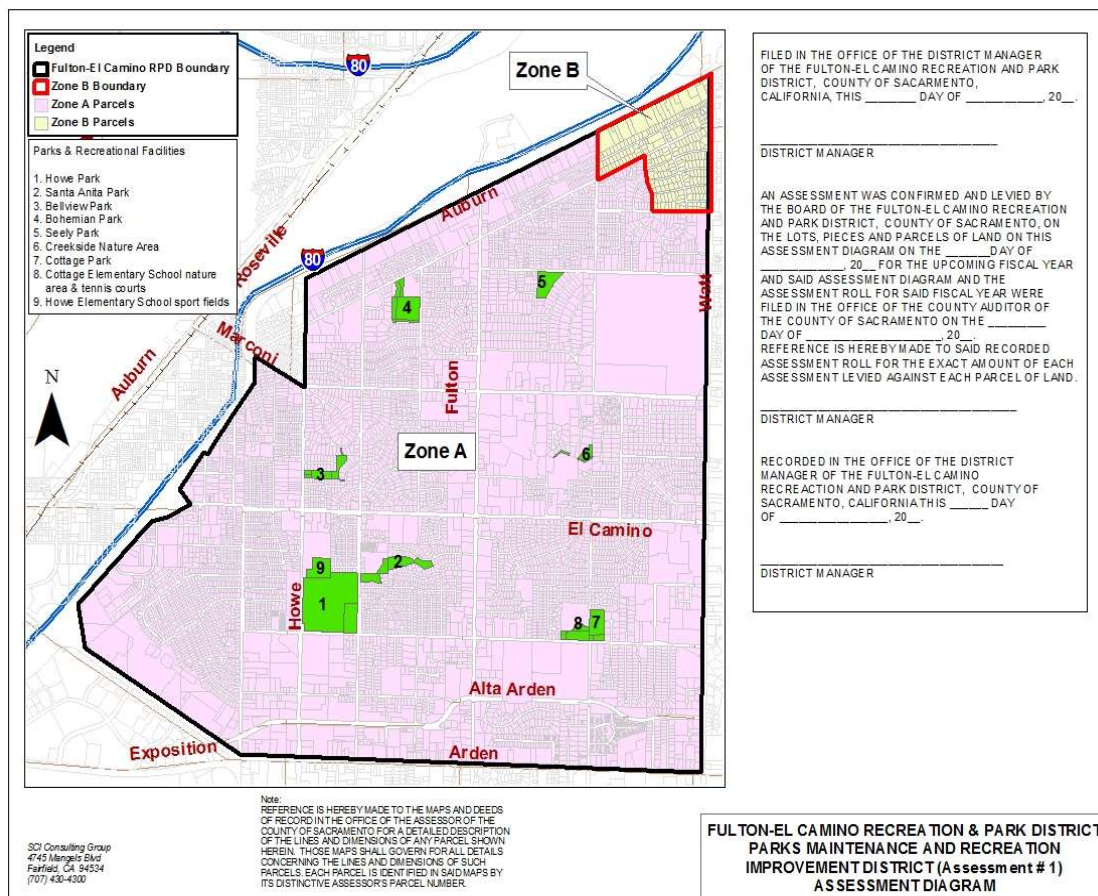
Assessment Roll for Fiscal Year 2026-27

An Assessment Roll (a listing of all parcels assessed within the Improvement District and the amount of the assessment) is on file with the Secretary of the Board and is, by reference, made part of this Report and is available for public inspection during normal office hours.

Each lot or parcel listed on the Assessment Roll is shown and illustrated on the latest County Assessor records and these records are, by reference made part of this Report. These records shall govern for all details concerning the description of the lots or parcels.

Assessment Diagram

The Assessment Diagram for the Fulton-El Camino Recreation and Park District, Parks Maintenance and Recreation Improvement Assessment District, is on file in the office of the General Manager of the Fulton-El Camino Recreation and Park District at 2201 Cottage Way, Sacramento, CA 95825. A small copy of this Assessment Diagram is included below. Reference is hereby made to the maps and deeds of record in the office of the Assessor of the County of Sacramento for a detailed description of the lines and dimensions of any parcels shown therein. Those maps shall govern for all details concerning the lines and dimensions of such parcels. Each parcel is identified in such maps and on the Assessment Roll by its distinctive Assessor's Parcel Number.



Fulton-El Camino Recreation and Park District

Parks Maintenance and Recreation Improvement District (Assessment #1)

Engineer's Report, Fiscal Year 2026-27

SCI Consulting Group



Fulton-El Camino Recreation and Park District Engineer's Report

Parks Maintenance & Recreation Improvement
District (Assessment #2)

July 2026
Engineer's Report

Pursuant to the Landscaping and Lighting Act of 1972,
Article XIIID of the California Constitution

Engineer of Work:



4745 Mangels Boulevard
Fairfield, California 94534
707.430.4300

www.sci-cg.com
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Fulton-El Camino Recreation and Park District

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Lead Assessment Engineer, John Bliss, M.Eng., P.E.

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Introduction

Overview

The Fulton-El Camino Recreation and Park District (the “Park District”) provides park facilities and recreational programs to its service area of approximately 7,400 parcels. The Park District currently owns, operates or maintains seven neighborhood and community parks which are located throughout the developed areas of the Park District. In addition, the Park District assists with the maintenance of the sports fields at Howe Elementary School. The Park District’s facilities are summarized as follows:

District’s Facilities

District Parks/Facilities

1. Howe Park– 38 acres – 2201 Cottage Way: Richard T Conzelmann Community Center: (District offices, auditorium, meeting rooms), dog park, 1 youth playground and 2 tot lots, 4 softball diamonds, (2 lighted), 2 sand volleyball courts (lighted), tennis courts (lighted, token operated) tennis wall, soccer fields, picnic tables and barbecues, open play area, creek, pond/fishing piers, gazebo, and restrooms.
2. Santa Anita Park – 7.7 acres – 2298 Bell Street: picnic tables, disc golf course, free play area and creek area.
3. Bellview Park – 4.3 acres – 2600 Howe Avenue, north of El Camino Avenue: gazebo, memorial plaza, playground, basketball courts, and free play area.
4. Bohemian Park – 10.2 acres – 3131 Wright Street (corner of Wright & Yellowstone): gazebo, playground, tennis courts, basketball courts, picnic tables and barbecues, free play area, and creek area. The park acreage also includes three recently acquired parcels for future development, adjoining the north side of the park fronting Edison Avenue. One parcel is 0.66 acres of unimproved land; the second parcel is 0.67 acres with a residential duplex, and the third parcel is 0.66 acres with a residential fourplex.
5. Seely Park – 5.2 acres – 3000 Pope Avenue: playground, basketball court, picnic tables and barbecues, restrooms, and water splash park.
6. Creekside Nature Area – 1.9 acres – Located at the North East Corner of the former Creekside Elementary School (Assessor Parcel Numbers 268-0210-068, 268-0290-018, and 268-0210-051): Nature walk/open space area featuring native plants and foliage.

7. Cottage Park – 7.5 acres – 3097 Cottage Way: Playground, tot lot, swimming pool (lap/diving pool and slide), activity center (home of the Fulton-El Camino Pre-school, before and after school programs, and youth camps), open play area, picnic tables and barbecues, creek, and restrooms.

School Parks/Facilities

8. Cottage Elementary School – 2221 Morse Avenue: Strong Ranch Slough nature area and tennis courts in the southern portion of the school property.
9. Howe Elementary School – 2404 Howe Avenue: sport fields in the south eastern portion of the school property.

Assessment Background

Prior to fiscal year 2000-01, the Park District experienced a revenue shortfall that was predominantly due to escalating maintenance costs (primarily water) and declining revenues (reduced property tax proceeds). In response to the revenue shortfall, park maintenance, repair and other services were cut back. The full-time park maintenance staff was also reduced. Moreover, repairs of recreation facilities were delayed, some facilities were closed and maintenance of parks was scaled back.

Therefore, in absence of a new local revenue source, the baseline level of park and recreation facilities in the Park District (the “Baseline Service”) would be a deteriorating level of maintenance and upkeep of the park and recreation facilities and properties listed above.

Due to this combination of decreased revenues and increased costs, in 2000 the Park District proposed to the property owners the establishment of a new benefit assessment to provide revenues for improved park maintenance services and other improvements to parks and recreation facilities (“Improvements” or “Improvements and Services”).

Assessment Formation

In February and March of 2000, the Park District conducted an assessment ballot proceeding pursuant to the requirements of Article XIID of the California Constitution ("The Taxpayer's Right to Vote on Taxes Act") and the Landscaping the Lighting Act of 1972. During this ballot proceeding, property owners in the Park District were provided with a notice and ballot for the proposed parks assessment ("the Parks and Recreation Maintenance and Improvement District," "Improvement District," "Assessment # 2" or "Assessment"). A 45-day period was provided for balloting and a public hearing was conducted on March 14, 2000. At the public hearing, all ballots returned within the 45-day balloting period were tabulated.

It was determined at the public hearing that the assessment ballots submitted in opposition to the proposed assessments did not exceed the assessment ballots submitted in favor of the assessments (with each ballot weighted by the proportional financial obligation of the property for which the ballot was submitted). The final balloting result was 63.8% weighted support from ballots returned.

As a result, the Board gained the authority to approve the levy of the assessments for fiscal year 2000-01 and to continue to levy in future years. The authority granted by the ballot proceeding was for a maximum assessment rate of \$12.00 per single family home, increased each subsequent year by the Northern California (San Francisco Bay Area) Consumer Price Index (the "CPI") not to exceed 3% per annum.

Assessment Continuation

In each subsequent year for which the Assessments will be continued, the Board must direct the preparation of an Engineer's Report, budgets and proposed Assessments for the upcoming fiscal year. After the Engineer's Report is completed, the Board may preliminarily approve the Engineer's Report and proposed Assessments and establish the date for a public hearing on the continuation of the Assessments. This Report was prepared pursuant to the direction of the Board adopted on March 19, 2026 by resolution number 2025/26-18.

This Engineer's Report ("Report") was prepared to establish the budget for the continued Improvements and Services that will be funded by the proposed 2026-27 Assessments, determine the benefits received by property from the Improvements and Services within the Park District and the method of assessment apportionment to lots and parcels within the Park District. This Report and the proposed Assessments have been made pursuant to the Landscaping and Lighting Act of 1972, Part 2 of Division 15 of the California Streets and Highways Code (the "Act") and Article XIID of the California Constitution (the "Article").

If the Board approves this Engineer's Report and the continuation of the Assessments by resolution, a notice of public hearing must be published in a local paper at least 10 days prior to the date of the public hearing. The resolution preliminarily approving the Engineer's Report and establishing the date for a public hearing is used for this notice.

Following the minimum 10-day time period after publishing the notice, a public hearing is held for the purpose of allowing public testimony about the proposed continuation of the Assessments. This hearing is currently scheduled for July 16, 2026. At this hearing, the Board will consider approval of a resolution confirming the continuation of the Assessments for fiscal year 2026-27. If so confirmed and approved, the Assessments will be submitted to the County Auditor/Controller for inclusion on the property tax rolls for Fiscal Year 2026-27.

Including the authorized annual adjustment, the maximum authorized assessment rates for fiscal year 2026-27 are \$24.02 per single family equivalent benefit unit for Zone of Benefit A, and \$12.01 per single family equivalent benefit unit for Zone of Benefit B. The proposed fiscal year 2026-27 assessment rates per single family equivalent benefit unit are \$24.02 for Zone A and \$12.01 for Zone B.

Legal Requirements

Proposition 218

This Assessment was formed consistent with Proposition 218, The Right to Vote on Taxes Act, which was approved by the voters of California on November 6, 1996, and is now codified as Articles XIII C and XIII D of the California Constitution. Proposition 218 provides for benefit assessments to be levied to fund the cost of providing services, improvements, as well as maintenance and operation expenses to a public improvement which directly benefits the assessed property.

Proposition 218 describes a number of important requirements, including property-owner balloting, for the imposition, increase and extension of assessments, and these requirements are satisfied by the process used to establish this assessment.

Silicon Valley Taxpayers Association, Inc. v Santa Clara County Open Space Authority

In July of 2008, the California Supreme Court issued its ruling on the Silicon Valley Taxpayers Association, Inc. v. Santa Clara County Open Space Authority ("SVTA"). This ruling is the most significant legal document in further legally clarifying Proposition 218. Several of the most important elements of the ruling included further emphasis that:

- Benefit assessments are for special, not general, benefit
- The services and/or improvements funded by assessments must be clearly defined
- Special benefits are directly received by and provide a direct advantage to property in the Improvement District
- The assessment paid by property should be proportional to the special benefits it receives from the Improvements

Dahms v. Downtown Pomona Property

On June 8, 2009, the 4th Court of Appeals amended its original opinion upholding a benefit assessment for property in the downtown area of the City of Pomona in *Dahms v. Downtown Pomona Property* (“*Dahms*”). On July 22, 2009, the California Supreme Court denied review. In *Dahms* the Court upheld an assessment that was 100% special benefit (i.e. 0% general benefit) on the rationale that the services and improvements funded by the assessments were directly provided to property in the assessment district. The Court also upheld discounts and exemptions from the assessment for certain properties.

Bonander v. Town of Tiburon

On December 31, 2009, in *Bonander v. Town of Tiburon* (“*Bonander*”), the 1st District Court of Appeal overturned a benefit assessment approved by property owners to pay for placing overhead utility lines underground in an area of the Town of Tiburon. The Court invalidated the assessments primarily on the grounds that the assessments had been apportioned to assessed property based on the costs within sub-areas of the assessment district instead of the overall cost of the improvements and the overall proportional special benefits.

Beutz v. County of Riverside

On May 26, 2010 the 4th District Court of Appeals issued a decision in *Steven Beutz v. County of Riverside* (“*Beutz*”). This decision overturned an assessment for park maintenance in Wildomar, California, primarily because the general benefits associated with improvements and services were not explicitly calculated, quantified and separated from the special benefits.

Golden Hill Neighborhood Association v. City of San Diego

On September 22, 2011, the San Diego Court of Appeal issued a decision on the *Golden Hill Neighborhood Association v. City of San Diego* appeal. This decision overturned an assessment for street and landscaping maintenance in the *Greater Golden Hill* neighborhood of San Diego, California. The court described two primary reasons for its decision. First, like in *Beutz*, the court found the general benefits associated with services were not explicitly calculated, quantified and separated from the special benefits. Second, the court found that the City had failed to record the basis for the assessment on its own parcels.

Compliance with Current Law

This Engineer's Report is consistent with the *SVTA* decision and with the requirements of Article XIIC and XIID of the California Constitution because the Improvements to be funded are clearly defined; the benefiting property in the Improvement District enjoys close and unique proximity, access and views to the Improvements; the Improvements serve as an extension of usable land area for benefiting properties in the Improvement District and such special benefits provide a direct advantage to property in the Improvement District that is not enjoyed by the public at large or other property.

This Engineer's Report is consistent with *Beutz*, *Dahms* and *Greater Golden Hill* because, the Improvements directly benefit property in the Improvement District and the general benefits have been explicitly calculated, quantified and excluded from the Assessments. The Engineer's Report is consistent with *Bonander* because the Assessments have been apportioned based on the overall cost of the Improvements and proportional special benefit to each property, rather than the proportional cost to the District to provide the Improvements to specific properties.

Plans & Specifications

The Fulton-El Camino Recreation and Park District maintains park facilities in locations throughout its boundaries. The work and improvements (the “Improvements” or “Improvements and Services”) proposed to be undertaken by the Fulton-El Camino Recreation and Park District’s Parks Maintenance & Recreation Improvement District (the “Improvement District”) and the cost thereof paid from the levy of the annual assessment provide special benefit to Assessor Parcels within the Improvement District as defined in the Method of Assessment herein. In addition to the definitions provided by the Landscaping and Lighting Act of 1972, (the “Act”) the work and Improvements are generally described as follows:

Installation, maintenance and servicing of public recreational facilities and improvements, including, but not limited to, turf and play areas, landscaping, ground cover, shrubs and trees, irrigation systems, drainage systems, lighting, fencing, entry monuments, basketball courts, tennis courts, gymnasium, senior center, running tracks, swimming pools, other recreational facilities, graffiti removal and repainting, and labor, materials, supplies, utilities and equipment, as applicable, at each of the locations owned, operated or maintained by the Fulton-El Camino Recreation and Park District. Plans and specifications for these improvements have been filed with the General Manager of the Fulton-El Camino Recreation and Park District and are incorporated herein by reference.

As applied herein, “Installation” means the construction of recreational improvements, including, but not limited to, land preparation (such as grading, leveling, cutting and filling), sod, landscaping, irrigation systems, sidewalks and drainage, lights, playground equipment, play courts, recreational facilities and public restrooms.

“Maintenance” means the furnishing of services and materials for the ordinary and usual maintenance, operation and servicing of any improvement, including repair, removal or replacement of all or any part of any improvement; providing for the life, growth, health, and beauty of landscaping, including cultivation, irrigation, trimming, spraying, fertilizing, or treating for disease or injury; the removal of trimmings, rubbish, debris, and other solid waste, and the cleaning, sandblasting, and painting of walls and other improvements to remove or cover graffiti.

“Servicing” means the furnishing of electric current, or energy, gas or other illuminating agent for any public lighting facilities or for the lighting or operation of any other improvements; or water for the irrigation of any landscaping, the operation of any fountains, or the maintenance of any other improvements.

Incidental expenses include all of the following: (a) The costs of preparation of the report, including plans, specifications, estimates, diagram, and assessment; (b) the costs of printing, advertising, and the giving of published, posted, and mailed notices; (c) compensation payable to the County for collection of assessments; (d) compensation of any engineer or attorney employed to render services in proceedings pursuant to this part; (e) any other expenses incidental to the construction, installation, or maintenance and servicing of the Improvements; (f) any expenses incidental to the issuance of bonds or notes pursuant to Streets & Highways Code Section 22662.5; and (g) costs associated with any elections held for the approval of a new or increased assessment. (Streets & Highways Code §22526).

The Assessment proceeds will be exclusively used for Improvements within the Improvement District plus Incidental expenses. Reference is made to the list of park and recreation facilities listed in the Introduction page of this Report which specifically identifies the locations of the permanent public facilities to be funded by the Assessment proceeds. For further detail, including specific expenditure and improvement plans by site, refer to the plans and specifications on file with the Fulton-El Camino Recreation and Park District.

Cost Estimate for Fiscal Year 2026-27

Introduction

Following are the proposed Improvements, and resulting level of improved parks and recreation facilities, for the Improvement District. As previously noted, the baseline level of service included a declining level of parks and recreation facilities due to shortages of funds for the Park District. Improvements funded by the Assessments are over and above the previously declining baseline level of service. The formula below describes the relationship between the final level of improvements, the existing baseline level of service, and the enhanced level of improvements to be funded by Assessment # 2.

$$\text{Final Level of Improvements} = \text{Baseline Level of Improvements} + \text{Enhanced Level of Improvements}$$

Budget for Fiscal Year 2026-27

The following budget lists the Improvements that will be funded by the Improvement District in Fiscal Year 2026-27.

Figure 1 – Estimate of Cost: Fiscal Year 2026-27

Maintenance, Service and Capital Expenditures 1		
Salaries and Employee Benefits	\$681,943	
Services and Supplies	\$448,615	
Capital Outlay	\$0	
Loan Redemption	\$0	
Total Maintenance, Service and Capital Expenditures		\$1,130,558
Incidental Expenses		
Assessment Collection, Professional Services and Administration 2		<u>\$13,686</u>
Total Maintenance, Service and Capital Expenditures		\$1,144,244
Total Benefit of Improvements		
		\$1,144,244
Single Family Equivalent Units (SFEs)		11,773
Benefit Received per SFE Unit		\$97.20
Less:		
District Contribution from Other Sources for General Benefit 3	(\$282,640)	
District Contribution from Other Sources toward Special Benefit 3	<u>(\$578,824)</u>	
Total District Contribution from Other Sources		<u>(\$861,463)</u>
Net Cost Maintenance, Service and Capital		\$282,781
Budget Allocation to Property 4		
Total Assessment Budget 5		\$282,781
Single Family Equivalent Benefit Units - Zone A		<u>11,534</u>
Single Family Equivalent Benefit Units - Zone B		<u>477</u>
Total Single Family Equivalent Benefit Units (Zone A + 50% of Zone B)		11,773
Assessment per Single Family Equivalent Unit (SFE)		\$24.02

Notes to Estimate of Cost:

1. The item Maintenance, Service and Capital Expenditures includes the operation and maintenance of Improvements, and will provide funding for enhanced maintenance of all parks and recreation facilities on a daily basis, seven days per week. Improvements will include mowing turf, trimming and caring for landscaping, fertilization and aeration of grounds and playfields, routine maintenance and safety inspections, painting, replacing/repairing broken or damaged equipment, trash removal and cleanup, irrigation and irrigation system maintenance, and other services as needed.
2. Estimated fiscal year 2026-27 incidental costs includes legal fees, assessment administration, county charges for inclusion of assessments on property tax bills, publication of legal notices, and other incidental costs.
3. As determined in the following section, at least 25% of the cost of Improvements must be funded from sources other than the Assessments to cover any general benefits from the Improvements. Therefore, out of the total cost of Improvements of \$1,130,558, the District must contribute at least \$282,640 from sources other than the Assessments. The District will contribute \$861,463, which more than covers any general benefits from the Improvements. These non-assessment revenues include property taxes, grants, recreation fees, landscaping services fees, water rebilling fees, vehicle code fines, citation/security revenue, picnic rentals, and other miscellaneous reimbursements.
4. The Act requires that proceeds from the Assessments must be deposited into a special fund that has been set up for the revenues and expenditures of the Improvement District. Moreover, funds raised by the Assessment shall be used only for the purposes stated within this Report. Any balance remaining at the end of the fiscal year, July 1, must be carried over to the next fiscal year. The Park District may also establish a reserve fund for contingencies and special projects as well as a capital improvement fund for accumulating funds for larger capital improvement projects or capital renovation needs. Any remaining balance would either be placed in the reserve fund, the capital improvement fund, or would be used to reduce future years' Assessments.
5. The Total Assessment Budget is the sum of the final property assessments rounded to the lower even penny to comply with the County Auditor's levy submission requirements; therefore, the budget amount may slightly differ from the assessment total.

Method of Apportionment

Method of Apportionment

This section of the Engineer's Report explains the special and general benefits to be derived from the Improvements to park facilities and District maintained property throughout the Park District, and the methodology used to apportion the total assessment to properties within the Improvement District.

The Improvement District consists of all Assessor Parcels within the boundaries of the Fulton-El Camino Recreation and Park District. The method used for apportioning the assessment is based upon the proportional special benefits conferred to properties over and above the general benefits conferred to real property in the Improvement District or to the public at large. Special benefit is calculated for each parcel in the Improvement District using the following process:

1. Identification of all benefit factors derived from the Improvements
2. Calculation of the proportion of these benefits that are general
3. Determination of the relative special benefit within different areas within the Improvement District
4. Determination of the relative special benefit per property type
5. Calculation of the specific assessment for each individual parcel based upon special vs. general benefit; location, property type, property characteristics, improvements on property and other supporting attributes

Discussion of Benefit

In summary, the Assessments can only be levied based on the special benefit to property. Any and all general benefit must be funded from another source. This special benefit is received by property over and above any general benefits from the Improvements. With reference to the requirements for Assessments, Section 22573 of the Landscaping and Lighting Act of 1972 states:

"The net amount to be assessed upon lands within an assessment district may be apportioned by any formula or method which fairly distributes the net amount among all assessable lots or parcels in proportion to the estimated benefits to be received by each such lot or parcel from the improvements."

Proposition 218, as codified in Article XIID of the California Constitution, has confirmed that assessments must be based on the special benefit to property and that the value of the special benefits must reasonably exceed the cost of the assessment:

"No assessment shall be imposed on any parcel which exceeds the reasonable cost of the proportional special benefit conferred on that parcel."

Since assessments are levied on the basis of special benefit, they are not a tax and are not governed by Article XIII A of the California Constitution.

The SVTA decision also clarifies that a special benefit is a service or improvement that provides a direct advantage to a parcel and that indirect or derivative advantages resulting from the overall public benefits from a service or improvement are general benefits. The SVTA decision also provides specific guidance that park improvements are a direct advantage and special benefit to property that is proximate to a park that is improved by an assessment:

The characterization of a benefit may depend on whether the parcel receives a direct advantage from the improvement (e.g. proximity to a park) or receives an indirect, derivative advantage resulting from the overall public benefits of the improvement (e.g. general enhancement of the district's property values).

Finally, Proposition 218 twice uses the phrase "over and above" general benefits in describing special benefit. (Art. XIID, sections 2(i) & 4(f).) The SVTA decision further clarifies that special benefits must provide a direct advantage to benefiting property and that proximity to a park is an example of a special benefit.

Benefit Factors

The special benefits from the Improvements increase the utility, functionality and desirability of these properties and are listed below:

Proximity to improved parks and recreational facilities

Only the specific properties within close proximity to the Improvements are included in the Improvement District. The Improvement District was narrowly drawn to include only the benefiting parcels. Therefore, property in the Improvement District enjoys unique and valuable proximity (and access, as described in the next section) to the Improvements that the public at large and property outside the Improvement District do not share.

In absence of the Assessments, the Improvements would not be provided and the parks and recreation areas in the Improvement District will be degraded due to insufficient funding for maintenance, upkeep and repair. Therefore, the Assessments provide Improvements that are over and above what otherwise would be provided. Improvements that are over and above what would otherwise be provided do not by themselves translate into special benefits but when combined with the unique proximity and access enjoyed by parcels in the Improvement District, they provide a direct advantage and special benefit to property in the Improvement District.

Access to improved parks, open space and recreational areas

Since the parcels in the Improvement District are nearly the only parcels that enjoy close access to the Improvements, they directly benefit from the unique close access to improved parks, open space and recreation areas that are provided by the Assessments. This is a direct advantage and special benefit to property in the Improvement District.

Improved views

The Improvement District, by maintaining the landscaping at its parks, recreation and open space facilities, provides improved views of the Improvements to the proximate properties within the Improvement District. Therefore, the improved and protected views provided by the Assessments are another direct and tangible advantage that is uniquely conferred upon property in the Improvement District.

Extension of a property's outdoor areas and green spaces for properties within close proximity to the Improvements

In large part because it is cost prohibitive to provide large open land areas on property in the Improvement District, the residential, commercial and other benefiting properties in the Improvement District do not have large outdoor areas and green spaces. The parks in the Improvement District provide these larger outdoor areas that serve as an effective extension of the land area for proximate properties because the Improvements are uniquely proximate and accessible to property in close proximity to the Improvements. The Improvements, therefore, provide an important, valuable and desirable extension of usable land area and neighborhood-serving amenities for the direct advantage and special benefit of properties with good and close proximity to the Improvements.

According to the industry-standard guidelines established by the National Park and Recreation Association (the “NPRA”), neighborhood parks in urban areas have a service area radius of generally one-half mile and community parks in urban areas have a service area radius of approximately two miles. The service radii for neighborhood parks and neighborhood green spaces were specifically established to give all properties within the service radii close proximity and easy walking access to such public land areas. Since proximate and accessible parks serve as an extension of the usable land area for property in the service radii and since the service radii was specifically designed to provide close proximity and access, the parcels within this service area clearly receive a direct advantage and special benefit from the Improvements, and this advantage is not received by other properties or the public at large.

An analysis of the service radii for the Improvements finds that all properties in the Improvement District enjoy the distinct and direct advantage of being close and proximate to park sites within the Improvement District. The benefiting properties in the Improvement District therefore uniquely and specially benefit from the Improvements.

Benefit Finding

In summary, real property located within the boundaries of the Improvement District distinctly and directly benefits from closer proximity, access and views of improved parks, recreation facilities, landscaping, trail systems and other public resources funded by the Assessments. The Improvements are specifically designed to serve local properties in the Improvement District, not other properties or the public at large. The public at large and other properties outside the Improvement District receive only limited benefits from the Improvements because they do not have proximity, good access or views of the Improvements. These are special benefits to property in the Improvement District in much the same way that sewer and water facilities, sidewalks and paved streets enhance the utility and desirability of property and make them more functional to use, safer and easier to access.

General versus Special Benefit

Article XIID, Section 4(a) of the California Constitution requires any local agency proposing to increase or impose a benefit assessment to “separate the general benefits from the special benefits conferred on a parcel.” The rationale for separating special and general benefits is to ensure that property owners subject to the benefit assessment are not paying for general benefits. The Assessment can fund special benefits but cannot fund general benefits. Accordingly, a separate estimate of the special and general benefit is given in this section.

Article XIID never defines the term “general benefit.” The definition of special benefit in Section 2(i) includes the statement that general enhancement of property value does not constitute special benefit. SVTA expands somewhat on this idea by stating that general benefit may be described as “an indirect, derivative advantage” resulting from the improvements. One infers from Article XIID that all benefit is either general or special.

In other words:

Total Benefit	=	General Benefit	+	Special Benefit
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There is no widely-accepted or statutory formula for quantifying the amount of any general benefit that is identified. General benefits are benefits from improvements or services that are not special in nature, are not “particular and distinct” and are not “over and above” benefits received by other properties. SVTA provides some clarification by indicating that general benefits provide “an indirect, derivative advantage” and are not necessarily proximate to the improvements.

In this Report, the general benefit is first identified, conservatively (i.e. generously) estimated, and then budgeted so that it is funded by sources other than the Assessment. The starting point for evaluating general and special benefits is the current, baseline level of service. The Assessment # 2 funds Improvements “over and above” this general, baseline level and the general benefits estimated in this section are over and above the baseline. A formula to estimate the general benefit is listed below:

General Benefit	=	Benefit to Real Property Outside the Assessment District	+	Benefit to Real Property Inside the Assessment District that is Indirect and Derivative	+	Benefit to the Public at Large
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Special benefit, on the other hand, is defined in the state constitution as “a particular and distinct benefit over and above general benefits conferred on real property located in the district or to the public at large.” The *SVTA* decision indicates that a special benefit is conferred to a property if it “receives a direct advantage from the improvement (e.g., proximity to a park).” In this Assessment # 2, as noted, properties in the Improvement District have close and unique proximity, views and access to the Improvements, and uniquely improved desirability from the Improvements, and other properties and the public at large do not receive significant benefits because they do not have proximity, access or views of the Improvements. Therefore, the overwhelming proportion of the benefits conferred to property is special and is only minimally received by property outside the Improvement District or the public at large.

In the 2010 *Beutz* case, the 4th Appellate Court rejected an assessment for parks in large part because the general benefits were not calculated and quantified. In its decision, the 4th Appellate Court suggests that the use of parks in an assessment district by people who live outside of the district likely is a general benefit. This Engineer’s Report includes a specific, quantified calculation of general benefits, as described below, that is based in part on such use by people outside of the Improvement District. Moreover, the proportionality of the Assessments to the special benefits received by each parcel, based in large part on proximity is established as well. Therefore, the Assessments and this Engineer’s Report are consistent with the *Beutz* decision.

Calculating General Benefit

In this section, the general benefit is conservatively estimated and described, and then budgeted so that it is funded by sources other than the Assessment.

Benefit to Property Outside the Improvement District

Properties within the Improvement District receive almost all of the special benefits from the Improvements, because properties in the Improvement District enjoy unique close proximity and access to the Improvements that is not enjoyed by other properties or the public at large. However, certain properties within the proximity/access radius of the Improvements, but outside of the boundaries of the Improvement District, may receive some benefit from the Improvements. Since this benefit is conferred to properties outside the Improvement District boundaries, it contributes to the overall general benefit calculation and will not be funded by the Assessments.

The properties outside the Improvement District and within the proximity radii for neighborhood parks in the Improvement District may receive benefits from the Improvements. Since these properties are not assessed for their benefits because they are outside of the area that can be assessed by the District, this is form of general benefit to the public at large and other property. A 50% reduction factor is applied to these properties because they are all geographically on only one side of the Improvements and are over twice the average distance from the Improvements compared to properties in the Improvement District. The general benefit to property outside of the Improvement District is calculated as follows with the parcel and data analysis performed by SCI Consulting Group.

Assumptions:

609 parcels outside the District but within either 0.5 miles of a park within the Improvement District

7,391 parcels in the Improvement District.

50% relative benefit compared to property within the Improvement District.

Calculation of General Benefit to Property Outside the Improvement District

$$(609 / (7,391 + 609)) * 0.5 = 3.8\%$$

Although it can reasonably be argued that Improvements inside, but near the Park District boundaries are offset by similar park and recreational improvements provided outside, but near the Park District's boundaries, we use the more conservative approach of finding that 3.8% of the Improvements may be of general benefit to property outside the Improvement District.

Benefit to Property Inside the District that is Indirect and Derivative

The "indirect and derivative" benefit to property within the Improvement District is particularly difficult to calculate. A solid argument can be presented that all benefit within the Improvement District is special, because the Improvements are clearly "over and above" and "particular and distinct" when compared with the baseline level of service and the unique proximity, access and views of the Improvements enjoyed by benefiting properties in the Improvement District.

Nevertheless, the SVTA decision indicates there may be general benefit "conferred on real property located in the district" A measure of the general benefits to property within the Assessment area is the percentage of land area within the Improvement District that is publicly owned and used for regional purposes such as major roads, rail lines and other regional facilities because such properties used for regional purposes could provide indirect benefits to the public at large. Approximately 2.6% of the land area in the Improvement District is used for such regional purposes, so this is a measure of the general benefits to property within the Improvement District.

Benefit To The Public At Large

The general benefit to the public at large can be estimated by the proportionate amount of time that the Park District's parks and recreational facilities are used and enjoyed by individuals who are not residents, employees, customers or property owners in the Park District¹. Surveys of park and recreation facility usage for similar public facilities conducted by SCI Consulting Group have found that less than 5% of the usage of the Improvements is by those who do not live or work within District boundaries. When people outside the Improvement District use parks, they diminish the availability of parks for people within the Improvement District. Therefore, another 5% of general benefits are allocated for people within the Improvement District. Combining these two measures of general benefits, we find that 10% of the benefits from the Improvements are general benefits to the public at large.

Total General Benefits

Using a sum of these three measures of general benefit, we find that approximately 16.4% of the benefits conferred by the Improvements may be general in nature and should be funded by sources other than the Assessment.

General Benefit Calculation

3.8%	(Outside the Assessment District)
+ 2.6%	(Property within the Assessment District)
+ 10.0%	(Public at Large)
= 16.4%	(Total General Benefit)

Although this analysis finds that 16.4% of the Assessment may provide general benefits, the Assessment Engineer establishes a requirement for a minimum contribution from sources other than the Assessments of 25%. This minimum contribution above the measure of general benefits will serve to provide additional coverage for any other general benefits.

¹ . When District facilities are used by those individuals, the facilities are not providing benefit to property within the Park District. Use under these circumstances is a measure of general benefit. For example, a non-resident who is drawn to utilize the Park District facilities and shops at local businesses while in the area would provide special benefit to business properties as a result of his or her use of the Improvements. Conversely, one who uses Park District facilities but does not reside, work, shop or own property within the Park District boundaries does not provide special benefits to any property and is considered to be a measure of the general benefits.

The Park District's total budget for maintenance and improvement of its parks and recreational facilities is \$1,130,558. Of this total budget amount, the Park District will contribute \$861,463 from sources other than the Assessments for park maintenance and operations. This contribution by the Park District equates to approximately 76% of the total budget for maintenance and improvements, and more than offsets the cost of the general benefits resulting from the Improvements.

Zones of Benefit

The boundaries of the Improvement District have been carefully drawn to only include the properties in Fulton-El Camino Recreation and Park District that are proximate to the Improvements and that would materially benefit from the Improvements. Certain other properties surrounding the District were excluded from the Improvement area because these properties are generally less proximate to the Improvements. In other words, the boundaries of the Improvement District have been narrowly drawn to include only properties that will specially benefit from the Improvements, and would receive a declining level of service if the Assessments were not approved.

The SVTA decision indicates:

In a well-drawn district — limited to only parcels receiving special benefits from the improvement — every parcel within that district receives a shared special benefit. Under section 2, subdivision (i), these benefits can be construed as being general benefits since they are not “particular and distinct” and are not “over and above” the benefits received by other properties “located in the district.”

We do not believe that the voters intended to invalidate an assessment district that is narrowly drawn to include only properties directly benefiting from an improvement. Indeed, the ballot materials reflect otherwise. Thus, if an assessment district is narrowly drawn, the fact that a benefit is conferred throughout the district does not make it general rather than special. In that circumstance, the characterization of a benefit may depend on whether the parcel receives a direct advantage from the improvement (e.g., proximity to park) or receives an indirect, derivative advantage resulting from the overall public benefits of the improvement (e.g., general enhancement of the district's property values).

In the Improvement District, the advantage that each parcel receives from the Improvements is direct, and the boundaries are narrowly drawn to include only parcels that benefit from the Assessment. Therefore, the even spread of Assessment throughout the narrowly drawn district is indeed consistent with the OSA decision. For the most part, the benefits from the Improvements within the Improvement District do not vary further based on proximity of the parcels to the Improvements because the increased benefits of greater proximity to the Improvements are generally offset by a parallel increase in negative factors such as higher levels of traffic, noise, etc. that comes with increased proximity.

However, in order to most conservatively assure that Assessments are proportional to the relative level of special benefits in the Improvement District, the district has been divided into two zones. Zone of Benefit A (or “Zone A”) consists of all of the parcels in the District, with the exception of those parcels in Zone of Benefit B (or “Zone B”), as described below. Zone B consists of those parcels in the far northeastern portion of the District, that are outside or near the border of the NPRA park service radii, and are separated from the rest of the District by roads. A 50% reduction factor is applied to these properties because they are all geographically on only one side of the Improvements and are over twice the average distance from the Improvements compared to properties in the rest of the Improvement District. Due to their still good but somewhat diminished proximity to the Improvements, properties in Zone B receive only 50% of the benefit received by the parcels in Zone A.

Consequently, since all parcels in each Zone of Benefit have good access and proximity to the Improvements and the benefits to relatively closer proximity are offset by other factors, the benefit is equal for equivalent parcels within a Zone of Benefit.

Method of Assessment

As previously discussed, the Assessments provide specific Improvements that confer direct and tangible special benefits to properties in the Improvement District. The allocation of special benefits to property is partially based on the type of property and the size of property. These benefits can also partially be measured by the occupants on property in the Improvement District because such parcel population density is a measure of the relative benefit a parcel receives from the Improvements. Therefore, the apportionment of benefit is partially based the population density of parcels.

It should be noted that many other types of “traditional” assessments also use parcel population densities to apportion the Assessments. For example, the assessments for sewer systems, roads and water systems are typically allocated based on the population density of the parcels assessed. Moreover, assessments have a long history of use in California and are in large part based on the principle that benefits from a service or improvement funded by assessments that is enjoyed by tenants and other non-property owners ultimately is conferred directly to the underlying property.² Therefore, the apportionment of benefit is reasonably based on the type of parcels, the size of parcels and the population density of parcels.

The next step in apportioning assessments is to determine the relative special benefit for each property. This process involves determining the relative benefit received by each property in relation to a single family home, or, in other words, on the basis of Single Family Equivalents (SFE). This SFE methodology is commonly used to distribute assessments in proportion to estimated special benefit and is generally recognized as providing the basis for a fair and appropriate distribution of assessments. For the purposes of this Engineer’s Report, all properties are designated a SFE value, which is each property’s relative benefit in relation to a single family home on one parcel. In this case, the “benchmark” property is the single family detached dwelling which is one Single Family Equivalent or one SFE.

In the process of determining the appropriate method of assessment, the Engineer considered various alternatives. For example, an assessment only for all residential improved property was considered but was determined to be inappropriate because commercial, industrial and other properties also receive direct benefits from the Improvements.

² For example, in *Federal Construction Co. v. Ensign* (1922) 59 Cal.App. 200 at 211, the appellate court determined that a sewer system specially benefited property even though the direct benefit was to the people who used the sewers: “Practically every inhabitant of a city either is the owner of the land on which he resides or on which he pursues his vocation, or he is the tenant of the owner, or is the agent or servant of such owner or of such tenant. And since it is the inhabitants who make by far the greater use of a city’s sewer system, it is to them, as lot owners or as tenants, or as the servants or agents of such lot owners or tenants, that the advantages of actual use will redound. But this advantage of use means that, in the final analysis, it is the lot owners themselves who will be especially benefited in a financial sense.”

Moreover, a fixed or flat assessment for all properties of similar type was deemed to be inappropriate because larger properties receive a higher degree of benefit than other similarly used properties that are significantly smaller. As an example, for two properties used for commercial purposes, there is clearly a higher benefit provided to the larger property in comparison to a smaller commercial property because the larger property generally supports a larger building and has higher numbers of employees, customers and guests that would benefit from proximity and improved access to well maintained and improved parks and recreational facilities. So the potential population of employees or residents is a measure of the special benefits received by the property. Larger parcels, therefore, receive an increased benefit from the Assessments.

A fixed or flat assessment is used for all single family residential properties regardless of use or parcel size. Assessments on multifamily residential parcels vary based on the number of dwelling units. Assessments on commercial and industrial property are levied on an acreage basis because larger properties generally support larger buildings and have higher numbers of employees, customers and guests who would benefit from proximity and improved access to well-maintained and improved parks and recreational facilities.

Finally, the special benefits derived from the Assessments are conferred on property and are not based on a specific property owner's use of the improvements, or a specific property owner's occupancy of property or the property owner's demographic status such as age or number of dependents. However, it is ultimately people who value the special benefits described above and use and enjoy the Park District's park and recreational facilities. In other words, the benefits derived to property are related to the average number of people who could potentially live on, work at, or otherwise could use a property, not how the property is currently used by the present owner. Therefore, the number of people who could or potentially live on, work at or otherwise use a property is an indicator of the relative level of benefit received by a property.

In conclusion, the Assessment Engineer determined that the appropriate method of assessment apportionment should be based on the type and use of property, the relative size of the property, its relative population and usage potential, and its proximity to parks and recreational facilities. This method is further described below.

Residential Properties

Certain residential properties in the Improvement District that contain a single residential dwelling unit are assigned one Single Family Equivalent or 1.0 SFE. Traditional houses, zero-lot line houses and townhomes are included in this category of single family residential property.

Properties with more than one residential unit are designated as multi-family residential properties. These properties benefit from the Improvements in proportion to the number of dwelling units that occupy each property and the average number of people who reside in multi-family residential units versus the average number of people who reside in a single family home. The population density factors for the Fulton-El Camino Recreation and Park District, as depicted below, provide the basis for determining the SFE factors for residential properties. Using the total population in a certain property type in the area of a similar Park District in the same area from the 1990 Census (the most recent data available when Assessment # 2 was established) and dividing it by the total number of such households, finds that approximately 2.54 persons occupy each single family residence, whereas an average of 1.81 persons occupy each multi-family residence. Using the ratio of one SFE for each single-family residence, which equates to one SFE for every 2.54 persons, 0.71 SFE would equate to one multi-family unit or 0.71 SFE for every 1.81 residents. Likewise, each condominium unit receives 0.86 SFE and each mobile home receives 0.60 SFE.

Figure 2 – Residential Assessment Factors

<i>Type of Residential Land Use</i>	<i>Total Population</i>	<i>Occupied Households</i>	<i>Persons per Household</i>	<i>SFE Factor</i>
Single Family Residential	52,110	20,556	2.54	1.00
Condominium	4,959	2,385	2.08	0.82
Multi-Family Residential	32,703	18,118	1.81	0.71
Mobile Home on Separate Lot	484	318	1.52	0.60

Source: 1990 Census, community of Arden-Arcade

The single family equivalency factor of 0.71 per dwelling unit for multifamily residential properties applies to such properties with 5 or fewer units. Larger unit multifamily properties typically offer on-site recreational amenities and other facilities that tend to offset some of the benefits provided by the Improvements. Therefore, the benefit for properties in excess of 5 units is determined to be 0.71 SFE per unit for the first 5 units and 0.10 SFE per each additional unit in excess of 5 dwelling units.

Commercial/Industrial Properties

SFE values for commercial and industrial land uses are based on the equivalence of special benefit on a land area basis between single family residential property and the average commercial/industrial property. The SFE values for various commercial and industrial land uses are further defined by using average employee densities because the special benefit factors described previously can be measured by the average number of people who work at commercial/industrial properties.

In order to determine employee density factors, the findings from the San Diego Association of Governments Traffic Generators Study (the "SANDAG Study") are used because these findings were approved by the State Legislature for use in justifying commercial and industrial school facilities fees and are considered to be a good representation of the average number of employees per acre of land area for commercial and industrial properties. As determined by the SANDAG Study, the average number of employees per acre for commercial and industrial property is 24.

In comparison, the average number of people residing in a single family home in the area is 2.54. Since the average lot size for a single family home in Fulton-El Camino is approximately 0.25 acres, the average number of residents per acre of residential property is 10.

The employee density per acre is generally 2.4 times the population density of single family residential property per acre (24 employees per acre / 10 residents per acre). Therefore, the average employee density can be used as the basis for allocating benefit to commercial or industrial property since a property with 2.4 employees receives generally similar special benefit to a residential property with 1 resident. This factor of equivalence of benefit between 1 resident to 2.4 employees is the basis for allocating commercial/industrial benefit. Figure 3 below shows the average employees per acre of land area or portion thereof for commercial and industrial properties and lists the relative SFE factors per quarter acre for properties in each land use category.

Commercial and industrial properties in excess of 6 acres generally involve uses that are more land intensive relative to building areas and number of employees (lower coverage ratios). As a result, the benefit factors for commercial and industrial property land area in excess of 6 acres is determined to be the SFE rate per quarter acre for the first 6 acres and the relevant SFE rate per each additional acre over 6 acres.

Institutional properties that are used for residential, commercial or industrial purposes are also assessed at the appropriate residential, commercial or industrial rate.

Figure 3 – Commercial/Industrial Assessment Factors

<i>Type of Commercial/Industrial Land Use</i>	<i>Average Employees Per Acre</i>	<i>SFE Units per 1/4 Acre *</i>
Commercial	24	1.00
Office	68	2.83
Shopping Center	24	1.00
Industrial	24	1.00
Self Storage or Parking Lot	1	0.04

Source: San Diego Association of Governments Traffic Generators Study.

* The SFE factors for commercial and industrial parcels are applied by the quarter acre of land area or portion thereof. (Therefore, the minimum assessment for any assessable parcel in these categories is the SFE Units listed herein.)

Vacant Residential Land

The benefit to vacant properties is determined to be proportional to the corresponding benefits for similar type developed properties; however, at a lower rate due to the lack of improvements on the property. A measure of the benefits accruing to the underlying land is the average value of land in relation to improvements for developed property. An analysis of the Fiscal Year 2000-01 assessed valuation data from the County of Sacramento, found that 25% of the assessed value of improved properties is classified as the land value. It is reasonable to assume, therefore, that approximately 25% of the benefits are related to the underlying land and 75% are related to the improvements and the day-to-day use of the property. Using this ratio, the SFE factor for vacant parcels is 0.25 per parcel.

As properties are approved for development, their value also increases. Likewise, the special benefits received by vacant property increase as the property is approved for development, or becomes closer to being fully improved. When property is approved for development with a final map, the property has passed the final significant hurdle to development and can shortly undergo construction. Since the property is nearing the point of development, its special benefits increase. In addition, these properties are generally sold soon after completion of improvements, so the properties receive the additional benefit of desirability from prospective buyers due to the special benefits provided by proximity to improved parks and recreational facilities of the Park District. It is therefore determined that property with final map approval receives 50% of the relative benefit to improved property of similar use-type.

Other Properties

Article XIIID stipulates that publicly owned properties must be assessed unless there is clear and convincing evidence that those properties receive no special benefit from the Assessment.

All properties that are specially benefited are assessed. Public right-of-way parcels, well, reservoir or other water rights parcels, limited access open space parcels, watershed parcels, and common area parcels typically do not generate employees, residents, customers or guests. Moreover, many of these parcels have limited economic value and, therefore, do not benefit from specific enhancement of property value. Such parcels are, therefore, not specially benefited and are not assessed.

Church parcels and property used for educational purposes typically generate employees on a less consistent basis than other non-residential parcels. Moreover, many of these parcels provide some degree of on-site amenities that serve to offset some of the benefits from the Parks Maintenance and Improvement District. Therefore, these parcels receive minimal benefit and are assessed an SFE factor of 1.

Duration of Assessment

It is proposed that the Assessment be levied for fiscal year 2000-01 and continued every year thereafter, so long as the parks and recreational areas need to be improved and maintained and the Fulton-El Camino Recreation and Park District requires funding from the Assessments for its Improvements in the Improvement District. As noted previously, the Assessment can continue to be levied annually after the Fulton-El Camino Recreation and Park District Board of Directors approves an annually updated Engineer's Report, budget for the Assessment, Improvements to be provided, and other specifics of the Assessment. In addition, the District Board of Directors must hold an annual public hearing to continue the Assessment.

Appeals and Interpretation

Any property owner who feels that the assessment levied on the subject property is in error as a result of incorrect information being used to apply the foregoing method of assessment, may file a written appeal with the General Manager or her or his designee. Any such appeal is limited to correction of an assessment during the then current or, if before July 1, the upcoming fiscal year. Upon the filing of any such appeal, the Executive Director or his or her designee will promptly review the appeal and any information provided by the property owner. If the General Manager or her or his designee finds that the assessment should be modified, the appropriate changes shall be made to the Assessment Roll. If any such changes are approved after the Assessment Roll has been filed with the County for collection, the General Manager or his or her designee is authorized to refund to the property owner the amount of any approved reduction. Any dispute over the decision of the General Manager or her or his designee shall be referred to the Board of the Fulton-El Camino Recreation and Park District and the decision of the Board of the Fulton-El Camino Recreation and Park District shall be final.

Assessment Statement

WHEREAS, on March 19, 2026 the Governing Board (the "Board") of the Fulton-El Camino Recreation and Park District (the "District") adopted its Resolution No. 2025/26-18 initiating proceedings for the continuation of Assessments within the Improvement District for the Fulton-El Camino Recreation and Park District, County of Sacramento, California, pursuant to the provisions of the Landscaping and Lighting Act of 1972 and Article XIID of the California Constitution (collectively "the Act"), and to proceed with the proposed levy of Assessments;

WHEREAS, said Resolution directed the undersigned Engineer of Work to prepare and file a report presenting an estimate of costs, a diagram for the Improvement District and an assessment of the estimated costs of the Improvements upon all assessable parcels within the Improvement District, to which Resolution and the description of said proposed Improvements therein contained, reference is hereby made for further particulars;

NOW, THEREFORE, the undersigned, by virtue of the power vested in me under said Act and the order of the Board of said Fulton-El Camino Recreation and Park District, hereby make the following assessment to cover the portion of the estimated cost of said Improvements, and the costs and expenses incidental thereto to be paid by the Improvement District.

The amount to be paid for said Improvements and the expense incidental thereto, to be paid by the Improvement District for the fiscal year 2026-27 is generally as follows:

Figure 4 – Summary Cost Estimate for Fiscal Year 2026-27

Maintenance, Service and Capital Expenditures	\$1,130,558
Incidental Expenses	\$13,686
TOTAL BUDGET	\$1,144,244
District Contribution from Other Sources	(\$861,463)
NET AMOUNT TO ASSESSMENTS	\$282,781

As required by the Act, an Assessment Diagram is hereto attached and made a part hereof showing the exterior boundaries of said Improvement District. The distinctive number of each parcel or lot of land in the said Improvement District is its Assessor Parcel Number appearing on the Assessment Roll.

I do hereby assess and apportion said net amount of the cost and expenses of said Improvements, including the costs and expenses incident thereto, upon the parcels and lots of land within said Improvement District, in accordance with the special benefits to be received by each parcel or lot, from the Improvements, and more particularly set forth in the Cost Estimate and Method of Assessment hereto attached and by reference made a part hereof.

The Assessment is made upon the parcels or lots of land within the Improvement District in proportion to the special benefits to be received by the parcels or lots of land, from said Improvements.

Property owners in the Improvement District approved in an assessment ballot proceeding in 2000 the initial fiscal year benefit assessment for special benefits to their property including the CPI adjustment schedule. As a result, the assessment may continue to be levied annually and may be increased by up to the maximum annual CPI increase without any additional assessment ballot proceeding. In the event that in future years the assessments are levied at a rate less than the maximum authorized assessment rate, the assessment rate in a subsequent year may be increased up to the maximum authorized assessment rate without any additional assessment ballot proceeding.

The Assessment is subject to an annual adjustment tied to the Consumer Price Index-U for the Northern California (San Francisco Bay Area) as of December of each succeeding year (the "CPI"), with a maximum annual adjustment not to exceed 3%. Any change in the CPI in excess of 3% shall be cumulatively reserved as the "Unused CPI" and shall be used to increase the maximum authorized assessment rate in years in which the CPI is less than 3%. The maximum authorized assessment rate is equal to the maximum assessment rate in the first fiscal year the Assessment was levied adjusted annually by the minimum of 1) 3% or 2) the change in the CPI plus any Unused CPI as described above.

The change in the CPI from December 2024 to December 2025 was 3.03%, and the Unused CPI from the previous fiscal year was 2.69%. Therefore, the maximum authorized assessment rate for fiscal year 2026-27 is increased by 3.00% which equates to \$24.02 per single family equivalent benefit unit for Zone A and \$12.01 per single family equivalent benefit unit for Zone B. The estimate of cost and budget in this Engineer's Report proposes Assessments for fiscal year 2026-27 at the rates of \$24.02 for Zone A and \$12.01 for Zone B, which are the maximum authorized assessment rates.

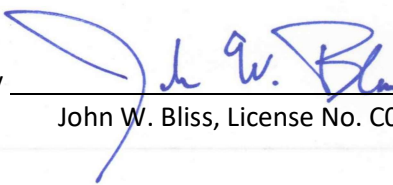
Each parcel or lot of land is described in the Assessment Roll by reference to its parcel number as shown on the Assessor's Maps of the County of Sacramento for the fiscal year 2026-27. For a more particular description of said property, reference is hereby made to the deeds and maps on file and of record in the office of the County Recorder of said County.

I hereby place opposite the Assessor Parcel Number for each parcel or lot within the Assessment Roll, the amount of the assessment for the fiscal year 2026-27 for each parcel or lot of land within the said Improvement District.

Dated: July 16, 2026



Engineer of Work

By  _____
John W. Bliss, License No. C052091

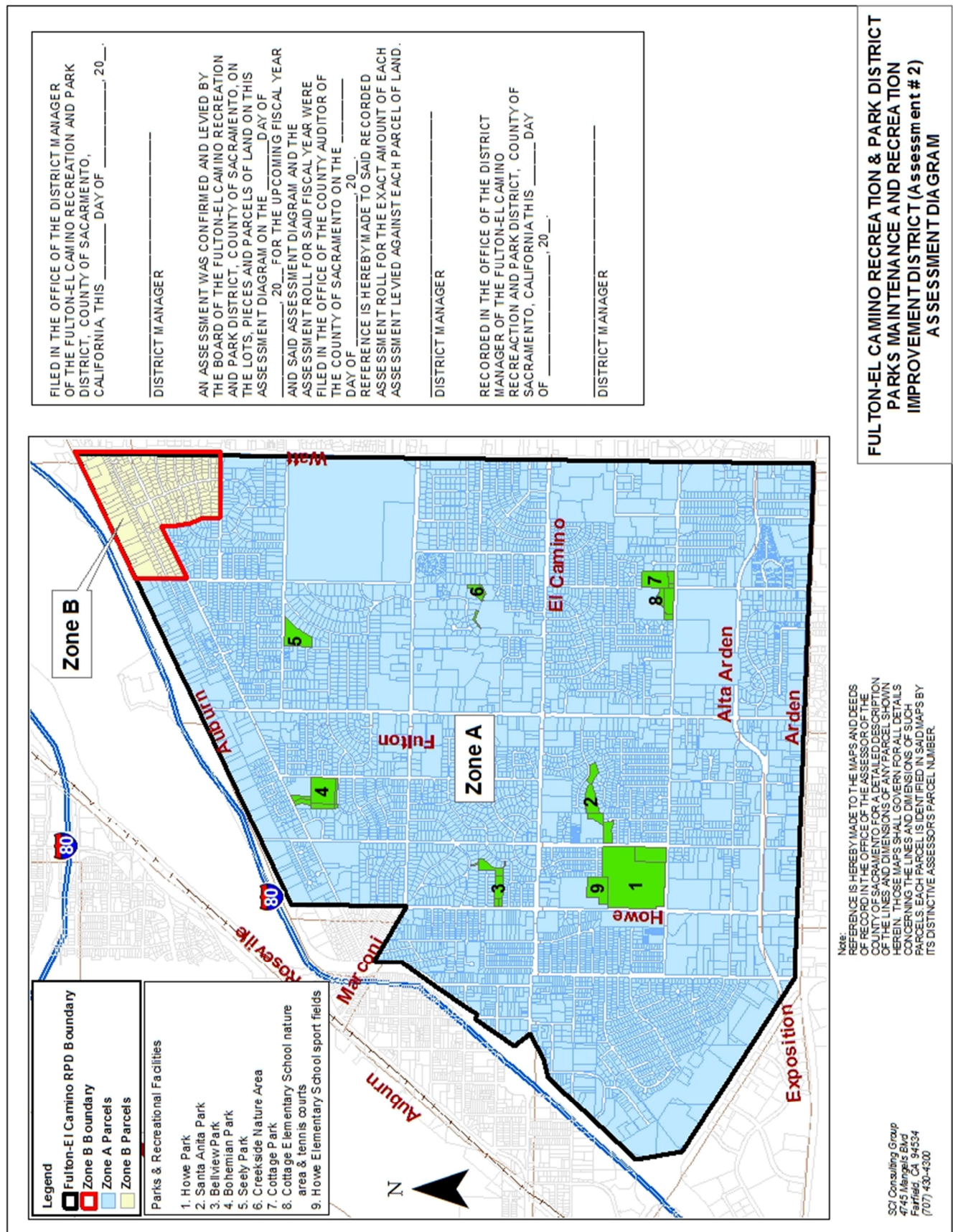
Assessment Roll for Fiscal Year 2026-27

An Assessment Roll (a listing of all parcels assessed within the Parks Maintenance and Recreation Improvement District and the amount of the assessment) is on file with the Secretary of the Board and is, by reference, made part of this report and is available for public inspection during normal office hours.

Each lot or parcel listed on the Assessment Roll is shown and illustrated on the latest County Assessor records and these records are, by reference made part of this report. These records shall govern for all details concerning the description of the lots or parcels.

Assessment Diagram/Boundary Map

The Boundary Map for the Fulton-El Camino Recreation and Park District, Parks Maintenance and Recreation Improvement Assessment District is on file in the office of the General Manager of the Fulton-El Camino Recreation and Park District at 2201 Cottage Way, Sacramento, CA 95825. A small copy of this Assessment Diagram is included in the following page. Reference is hereby made to the maps and deeds of record in the office of the Assessor of the County of Sacramento for a detailed description of the lines and dimensions of any parcels shown therein. Those maps shall govern for all details concerning the lines and dimensions of such parcels. Each parcel is identified in such maps and on the Assessment Roll by its distinctive Assessor's Parcel Number.



**FULTON-EL CAMINO RECREATION AND PARK DISTRICT
BOARD OF DIRECTORS MEETING
July 16, 2026**

Item No. 6.2

A Resolution Adopting A Records Retention Schedule, Updating The Records Retention Policy, And Authorizing Destruction Of Certain Agency Records

STAFF REPORT

TO: Board of Directors

FROM: Emily Ballus, General Manager

SUBJECT: A Resolution Adopting A Records Retention Schedule, Updating The Records Retention Policy, And Authorizing Destruction Of Certain Agency Records

Date: July 16, 2026

RECOMMENDATION

The Board adopt the resolution to update the records retention policy and the records retention schedules.

BACKGROUND

Fulton-El Camino Recreation and Park District (District) retained Gladwell Governmental Services, Inc. (GGS), a recognized expert in California local government records management, to develop a comprehensive Records Retention Schedule for the District. The updated program ensures that the District's records management practices comply with current legal requirements while improving operational efficiency and reducing long-term storage costs.

The updated Records Retention Schedule reflects changes in state and federal laws, incorporates current records management best practices, and recognizes advancements in electronic records technology. The schedule also identifies records that must be retained permanently while establishing appropriate retention periods for records that may be lawfully destroyed after meeting legal and administrative requirements.

Development of the Records Retention Schedule was driven by several factors, including:

- Changes in California laws governing local government records;
- The District's responsibility to preserve permanent and historically significant records;
- Increasing physical and electronic records storage costs;
- Advancements in records management technology and electronic document storage; and
- The need to improve consistency, efficiency, and accountability in records management practices.

Gladwell Governmental Services, Inc. has assisted more than 200 California local agencies, including numerous special districts, with records management, records retention, and document imaging programs.

The Records Retention Schedule was developed collaboratively with District departments to ensure that record descriptions, retention periods, and departmental responsibilities accurately reflect District operations. The schedule clearly identifies the department responsible for maintaining the official

record copy and establishes legally compliant retention periods for each record category. Implementation of the schedule is expected to reduce storage costs, improve operational efficiency, eliminate duplicate records, and free valuable office and storage space.

The District's department managers and General Counsel have reviewed the Records Retention Schedule and determined that the destruction of records in accordance with the adopted schedule will not adversely affect the interests of the District or the public.

It is standard practice for California local governments to authorize the routine destruction of records that have exceeded their adopted retention periods, subject to written approval by the appropriate Department Head and the General Manager, as provided in Section 2 of the proposed resolution.

The proposed resolution also authorizes administrative updates to the Records Retention Schedule when necessary to reflect changes in law, organizational structure, or records management practices without requiring additional Board action, as provided in Section 3 of the resolution. This authority allows the District to maintain a current and legally compliant records management program while reserving substantive policy changes for Board consideration.

FISCAL IMPACT

The District will realize significant savings both in labor and storage expenses; including the avoidance of future storage and/or construction costs.

DISCUSSION

The Board will discuss considering adopting Resolution No. 2026/2027-3 and Records Retention Schedules.

ATTACHMENTS

- Resolution 2026/27-3
- Policy 3090-Current
- Policy 3090 Draft/New
- Updated Records Retention Schedule

1 **FULTON-EL CAMINO RECREATION AND PARK DISTRICT**

2 **RESOLUTION NO. 2026/27-3**

3 **A RESOLUTION ADOPTING A RECORDS RETENTION SCHEDULE, UPDATING THE RECORDS**
4 **RETENTION POLICY, AND AUTHORIZING DESTRUCTION OF CERTAIN AGENCY RECORDS**

5 **WHEREAS**, the maintenance of numerous records is expensive, slows document retrieval,
6 and is not necessary after a certain period of time for the effective and efficient operation of the
7 government of the Fulton-El Camino Recreation and Park District; and

8 **WHEREAS**, Section 60200 of the Government Code of the State of California provides that
9 the legislative body of a Special District may authorize at any time the destruction or disposition of
10 any duplicate record, paper, or document, the original or a permanent photographic record of which
11 is in the files of any officer or department of the Agency; and

12 **WHEREAS**, Section 60201 of the Government Code of the State of California is amended
13 effective January 1, 2005 to provide that Agency records which have served their purpose, which are
14 not expressly required by law to be filed and persevered, and which will not adversely affect any
15 interest of the Agency or public may be destroyed; and

16 **WHEREAS**, the Agency has a procedure to maintain a list of the types of records destroyed
17 or disposed of that reasonably identifies the information contained in the records in each category;
18 and

19 **WHEREAS**, the Agency will update Policy 3090 Records Retention to reflect this new
20 schedule;

21 **NOW, THEREFORE, THE BOARD OF DIRECTORS OF THE FULTON-EL CAMINO**
22 **RECREATION AND PARK DISTRICT DOES RESOLVE AS FOLLOWS:**

23 **Section 1.** The Board of Directors finds that the destruction or disposition of the records
24 series that have exceeded the retention periods as set forth in the Records Retention Schedule
25 Exhibit A will not adversely affect any interest of the Agency or the public.

26 **Section 2.** The records of the Fulton-El Camino Recreation and Park District, as set forth in
27 the Records Retention Schedule Exhibit A, attached hereto and incorporated herein by this
28

reference, are hereby authorized to be destroyed as provided by Section 60201 et seq. of the Government Code of the State of California and in accordance with the provision of said schedule in accordance with Agency policies and procedures, and with the approval of the Department Head, General Manager and Ex-officio Clerk to the Board of Directors, and General Counsel.

Section 3. With the consent of the Department Head, General Manager and General Counsel, updates are hereby authorized to be made to the Records Retention Schedule

Section 4. The term “records” as used herein shall include documents, instructions, books, microforms, electronic files, magnetic tape, optical media, or papers; as defined by the California Public Records Act.

Section 5. This resolution shall become effective immediately upon its passage and adoption.

PASSED AND ADOPTED by the Board of Directors of the Fulton-El Camino Recreation and Park District on July 16, 2026, by the following vote:

AYES: Board Members-

NOES: Board Members-

ABSTAIN: Board Members-

ABSENT: Board Members-

I HEREBY CERTIFY that the foregoing Resolution 2026/27-3 was duly and regularly adopted at a regular meeting of the Board of Directors of the Fulton-El Camino Recreation and Park District on July 16, 2026.

Teresa Higgins, Chairperson

Attest

Kathy Stricklin, Secretary of the Board

Fulton-El Camino Recreation & Park District

POLICY & PROCEDURE MANUAL

POLICY TITLE: Records Retention
POLICY NUMBER: 3090

3090.1 Purpose. The purpose of this policy is to prescribe the internal controls for management of District records.

3090.2 Scope. This policy applies to all written, electronic, and recorded District records.

3090.3 Implementation. Records retention is the responsibility of each Department Head.

3090.4. Permanent Files are Documents, records, all Court final actions and correspondence having a historical value to the District, (i.e. Board Meeting Minutes.) and shall not be destroyed. Permanent files may be scanned and stored electronically when it is determined space for filing is a problem. The General Manager shall be responsible for insuring that legal requirements for storing are adhered to.

3090.5 Case/Project/Reference Files are documents created or received relative to a specific subject classified as a "case", a "project" or "reference". These files will be complete unto themselves. All documentation, memoranda, financial (if applicable) records, notes and changes shall be files in one folder or book, labeled as to classification and maintained until no longer needed. Whether these files are temporary or permanent depends upon the value/retention felt necessary by the responsible division maintaining the file.

3090.6 Disposition of Personnel Files - at the time of termination (voluntary or involuntary), the employee shall be offered all documentation of a temporary nature in the file, i.e. letters of appreciation, certificates of achievement, memoranda of record. The remainder of the file containing the application, evaluations, tax withholding forms etc., shall be maintained for three years following departure, after which time the file will be reviewed. All memoranda, letters and evaluations, etc., will be removed and destroyed. The original employment applications with any updated applications, last evaluation and the last (latest) Tax Withholding Form (W-4) will be retained permanently.

3090.7 Financial Records shall be retained according to the following schedule:

Invoices	5 years
Bank Statements and Reconciliations	5 years
Financial Statements	Permanently
Payroll Reports	Permanently
Audits	Permanently

3090.8 Program Participation records shall be retained for 3 years, except that releases of liability shall be kept until the participant reaches the age of 18 years and 6 months.

Fulton-El Camino Recreation & Park District

POLICY & PROCEDURE MANUAL

POLICY TITLE: Records Retention

POLICY NUMBER: 3090

3090.1 Purpose

The purpose of this policy is to establish a records management program that ensures District records are created, maintained, retained, preserved, and lawfully destroyed in accordance with applicable federal and state law.

3090.2 Scope

This policy applies to all District records, regardless of format, including paper records, electronic records, emails, photographs, audio and video recordings, and any other records created or received in the conduct of District business.

3090.3 Records Retention Schedule

The District shall maintain an official Records Retention Schedule, adopted by the Board of Directors and incorporated into this policy by reference. The Records Retention Schedule establishes the minimum retention periods, identifies the Office of Record for each record series, and specifies records that must be retained permanently.

3090.4 Responsibility

The General Manager shall administer the District's records management program. Department Heads are responsible for ensuring that records within their departments are maintained and disposed of in accordance with the adopted Records Retention Schedule.

3090.5 Electronic Records

Records may be maintained electronically when permitted by law. Electronic records shall be retained for the same period as paper records and maintained in a manner that preserves their authenticity, reliability, accessibility, and integrity in accordance with applicable law.

3090.6 Destruction of Records

Records that have satisfied the retention requirements established in the Records Retention Schedule may be destroyed only with the written authorization required by the adopted Records Retention Schedule and applicable Board resolution.

Copies, drafts, and transitory records that are not official records may be destroyed when no longer required, consistent with the Records Retention Schedule.

3090.7 Suspension of Destruction

No record shall be destroyed if it is subject to pending or reasonably anticipated litigation, claims, audits, investigations, subpoenas, Public Records Act requests, or any other legal hold. Normal retention periods shall resume only after the matter has been fully resolved.

3090.8 Administrative Updates

The General Manager is authorized to implement administrative procedures necessary to carry out this policy and to approve non-substantive updates to the Records Retention Schedule as authorized by Board resolution and consistent with applicable law.

HOW TO USE RETENTION SCHEDULES

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A **legend** explaining the information presented in the retention schedule; please read this for an explanation of every column.

The specified retention period applies regardless of the media of the record: If a record is stored on paper and electronic format (a computer file on a hard drive), **all electronic and paper records should be destroyed (or deleted / erased) after the specified period of time has elapsed** and authorization to destroy has been obtained.

Copies or duplicates of records should never be retained longer than the prescribed period for the official (original) record, and drafts and copies should be destroyed as soon as they are no longer required.

The term “records” shall include all records as defined by the California Public Records Act.

STRUCTURE: DISTRICT-WIDE, DEPARTMENTS & DIVISIONS

The District-wide retention schedule includes those records all departments have in common (e-mails, letters, memorandums, purchase orders, etc.). These records are NOT repeated in the Department retention schedule, unless that department is the Office of Record.

Each department has a separate retention schedule that describes the records that are unique to their department, or for which they are the Office of Record. The department retention schedules may be organized by Division within that Department. If a record is not listed in your department retention schedule, refer to the District-wide retention schedule, or look in the index to the schedules (provided after approval.)

BENEFITS

This retention schedule has been developed by Diane R. Gladwell, MMC, an expert in Municipal Government records, and will provide the District with the following benefits:

- Reduce administrative expenses, expedite procedures
- Free office space and computer storage space
- Reduce the cost of records storage – paper and electronic
- Eliminate duplication of effort within the District
- Find records faster
- Determine what media should be used to store records

AUTHORIZATION TO DESTROY RECORDS (Paper or Electronic Records):

Destruction or deletion of an **official (original) record** that has exceeded its retention period (and has SUBSTANTIVE CONTENT) must be **authorized prior to destruction or deletion.**

- If there is a **minimum** retention (“**Minimum 2 years**”), **the destruction / deletion must be authorized before it is destroyed,** as it is an official (original) record.

Copies, drafts, notes and non-records (or originals that do NOT have SUBSTANTIVE CONTENT) do **NOT require authorization**, and can be destroyed “**When No Longer Required.**”

- If there is **NOT** a minimum retention (“When No Longer Required”), it does **NOT** need to be authorized prior to destruction, as it is a preliminary draft, copy, or the Content is NOT Substantive.

On every page of the schedules (near the top, just under the column headings) are important instructions, including instructions regarding holds on destroying records. “**Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or resolution).**”

RECORDS RETENTION SCHEDULE LEGEND

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OFR (Office of Record): The department that keeps the Official (original or “record copy”) record for its retention period, then authorizes destruction. Usually, it is the department that originates the record. The official (original) record may be the paper / hard copy version of the record; however the electronic record may be the official (original) record. See the “Destroy Paper after Imaged & QC’d” below for the Legal Requirements for the electronic record to be the official (original) record.

Records Description: The record series (a group of like records).

Non-Record: Documents, studies, books and pamphlets produced by outside agencies, preliminary drafts not retained in the ordinary course of business.

Retention/Disposition:
Active (guideline): How long the file remains in the immediate office area
Inactive (guideline): How long the file is in off-site storage, stored electronically in accordance with law (see below)
Total Retention: The total number of years the record is retained

For file folders containing documents with different retention timeframes, use the document with the longest retention time.

P = Permanent

Indefinite = No fixed or specified retention period; used for databases, because the data fields are interrelated and certain data may require minimum retention.

Vital? = Those records that are needed for basic operations in the event of a disaster.

Media Options (guideline) terms used in State law:
Mag = Electronic Computer Magnetic Media (Hard drives, Networks, USB Drives, Cloud, etc.)
Mfr = Microforms (aperture cards, microfilm, microfiche, or jackets)
Ppr = Paper, Mylar, Linen, “Hard Copy”
OD = Optical Disk or other **Unalterable Media** which does not allow changes

Scan / Import (guideline):
“S” indicates the record should be scanned into the document imaging system;
“I” indicates the record should be electronically imported into the document imaging system;
“M” indicates the record was microfilmed

Destroy Paper after Imaged & QC’d (quality checked) / Trustworthy Electronic Record: “Yes” means the **electronic** record may serve as the **OFFICIAL** record (and the paper version may be destroyed, or the record may be electronically generated and never exist in paper format) **IF (these are the legal requirements for the electronic record to serve as the official (original) record)** the electronic record is also **placed on Unalterable Media, Immutable Cloud Media, Optical Disk (OD), DVD-R, CD-R, Blue-ray-R, or WORM, or microfilmed)** which is **stored in a safe & separate location**. Employees are required to Quality Check (“QC’d”) both the images and the indexes, and ensure the electronic record **contains all significant details from the original and be an adequate substitute for the original document for all purposes**; other legal mandates may apply.

Legend for legal citations (§: Section)

CC: Civil Code (CA)
CFC: California Fire Code
EVC: Evidence Code (CA)
FTB: Franchise Tax Board (CA)
HUD: Housing & Urban Develop. (US)
PC: Penal Code (CA)
UFC: Uniform Fire Code
W&I: Welfare & Institutions Code (CA)

B&P: Business & Professions Code (CA)
CCP: Code of Civil Procedure (CA)
CFR: Code of Federal Regulations (US)
FA: Food & Agriculture Code
GC: Government Code (CA)
LC: Labor Code (CA)
PRC: Public Resources Code
USC: United States Code (US)

CBC: California Building Code
CCR: California Code of Regulations (CA)
EC: Elections Code (CA)
FC: Family Code (CA)
H&S: Health & Safety Code (CA)
Ops. Cal. Atty. Gen.: Attorney General Opinions (CA)
R&T: Revenue & Taxation Code (CA)
VC: Vehicle Code (CA)

RECORDS RETENTION SCHEDULE: DISTRICT-WIDE STANDARDS (Used By ALL Departments)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
DISTRICT-WIDE (Used By ALL Departments)						
Lead Dept. (Managing the Agreement / Contract)	DW-001	Agreements / Contracts - ADMINISTRATIVE RECORDS (Correspondence with contractor where the Content relates in a substantive way to the performance of the contract, etc.)	Completion (unless otherwise noted) + 10 years	S / I	Yes: After QC and OD	Also see Grants. Covers EandO Statute of Limitations (insurance certificates are filed with agreement); Statute of Limitations: Contracts and Spec's=4 years, Wrongful Death=comp. + 5 years, CCP §§336(a), 337 et. seq., GC §60201
Dept. that Authors Document or Receives the District's Original Document	DW-002	Correspondence - ROUTINE (IF CONTENT relates in a SUBSTANTIVE way to the conduct of the public's business) (e.g. e-mails / emails with SUBSTANTIVE content, Letters, Memorandums, Administrative Files, I, General Files, etc.) SUBSTANTIVE synonyms: Significant, Meaningful, Considerable, Essential	2 years	S / I	Yes: After QC and OD	ONLY IF the Content relates in a substantive way to the conduct of the public's business; District of San Jose v. Superior Court (2017) 2 Cal.5th 608. GC §60201

RECORDS RETENTION SCHEDULE: DISTRICT-WIDE STANDARDS (Used By ALL Departments)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Dept. that Authors Document or Receives the District's Original Document	DW-003	Correspondence - TRANSITORY / PRELIMINARY DRAFTS , Interagency / Intraagency Memoranda not retained in the ordinary course of business Content NOT Substantive , / NOT made / retained for the purpose of preserving the informational content for future reference (e.g. calendars, checklists, e-mail / email, social media posting, employee directories, flyers, invitations, instant messaging, inventories, logs, mailing lists, meeting room registrations, speaker cards, Teams videoconference chats, notes / recordings, supply inventories, staff videoconferences, chats, notes, recordings, telephone messages, text messages, transmittal letters, thank yous, requests from other cities, preliminary notices for construction projects, undeliverable envelopes / returned mail envelopes, visitors logs, voice mails, webpages, etc.)	When No Longer Required			Electronic and paper records are categorized, filed and retained based upon the CONTENT of the record. Records where either the CONTENT relates in a SUBSTANTIVE way to the conduct of the public's business, or ARE made or retained for the purpose of preserving the informational content for future reference are SAVED by placing them in an electronic or paper (project) file folder and retained for the applicable retention period. If not mentioned here, consult District Counsel to determine if a record is considered transitory / preliminary draft. GC §§60201, 7927.500, 64 Ops. Cal. Atty. Gen. 317 (1981)); District of San Jose v. Superior Court (2017) 2 Cal.5th 608
Lead Dept.	DW-004	Legal Notices / Legal Advertising: Affidavits of Postings / Publications, Legal Advertising, Proof of Publication	2 years	S / I	Yes: After QC and OD	Statute of Limitations for some Municipal Government actions is 3 - 6 months; CCP§335 et seq; GC §§60201, 65009(c)(1)
Human Resources	DW-005	Personnel Files - Department-level Supervisor's Notes	Duration of Annual Review Period	S / I	Yes: After QC and OD	supervisors notes should maintained in a separate folder and be incorporated in the employee's annual performance review, supervisors' notes become final, which should be maintained by Human Resources. (See 29 CFR § 1602.31 and 1627.3(b)(ii); 8 CCR § 3204(d)(1) et seq.; GC §§ 12946, 12960.) GC § 60201(b)
Lead Dept.	DW-006	Press Releases / Media Alerts / Dig Alerts	3 Years	S / I	Yes: After QC and OD	Department Preference; entered into DigAlert Software the Excavator, Operator and the Regional Notification Center all have an obligation to retain the notice for 3 years; GC §§4216.2(f); GC §60201

RECORDS RETENTION SCHEDULE: DISTRICT-WIDE STANDARDS (Used By ALL Departments)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Authoring Dept.	DW-007	Reference Materials: Policies, Procedures, Handbooks, Brochures, Flyers, Manuals, Plans (if not provided in the schedule.) Standard Operating Procedures (SOPs), Studies / Reports (if not provided in the schedule.): Newsletters,: Produced by YOUR Department	Minimum of Superseded + 2 years	S / I	Yes: After QC and OD	retention period begins when new or updated versions of reference materials supersede prior versions. Department preference. GC § 60201(b)
Lead Dept.	DW-008	Reference Materials: Policies, Procedures, Handbooks, Brochures, Flyers, Manuals, Plans (if not provided in the schedule.) Standard Operating Procedures (SOPs), Studies / Reports (if not provided in the schedule.): Newsletters, etc.: Produced by OTHER Departments	Duration of Current Version	S / I	Yes: After QC and OD	Copies; GC §60200
Lead Dept.	DW-009	Reports, Studies (Historically significant)	P	S/I	Yes: After QC and OD	records are administratively and historically significant and are therefore retained permanently (in paper for first 10 years, in image format thereafter). GC § 60201(b)
Lead Dept.	DW-010	Reports, Studies (other than Historically significant)	10 years	S / I	Yes: After QC and OD	retention lasts 10 years only (when information becomes outdated). Department preference. GC § 60201(b)
Lead Dept.	DW-011	Special Projects / Subject Files	Minimum 2 years	S / I	Yes: After QC and OD	Department preference. GC § 60201(b)
Lead Dept.	DW-012	Surveys / Questionnaires (that the District issues).	2 years	S / I	Yes: After QC and OD	Retention applies to surveys and questionnaires that are treated as "drafts" when a summary of data is compiled; their content may relate in a substantive way to the conduct of the public's business and implicate PRA disclosure. Records should be retained during the pendency of a request. Retention continues to apply for 2 years after the disposition of a request . Authority for Retention; GC § 60201(d)(5)

RECORDS RETENTION SCHEDULE: DISTRICT-WIDE STANDARDS (Used By ALL Departments)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Lead Dept.	DW-013	Training Presented by Staff - COURSE RECORDS (Attendance Rosters / Sign-in Sheets, Outlines / Materials; includes Ethics, Fiscal & Financial, Harassment, Workplace Violence, Safety Training, Tailgates)	5 years	S / I	Yes: After QC and OD	Meets OSHA requirements; Ethics, Fiscal and Financial, Harassment and Workplace Violence Training is 5 years; EEOC/FLSA/ADEA (Age) requires 3 years for promotion, demotion, transfer, selection, or discharge; State Law requires 4 years for personnel actions; 8 CCR §3203 et seq., 29 CFR 1627.3(b)(1)(ii), LC §6429(c); GC §§12946, 12960, 60201, 53235.2(b), 53237.2(b); 53238.3(b); LC §6401.9(f),

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
ADMINISTRATION / GENERAL MANAGER AND BOARD SUPPORT						
Admin. / General Manager / Board Support	GM-001	Agendas, Agenda Packets, Agenda Staff Reports - District Board of Directors / Committees (Park Advisory, Measure Q Oversight, etc.)	P	S / I	Yes: After QC and OD	Department preference; GC §60201
Admin. / General Manager / Board Support	GM-002	Agreements / Contracts - JPA, MOUS, POLITICAL, RECORDED (Does not affect Finance / Purchasing) Agreement / Contract includes all contractual obligations (e.g. Successful Proposal / Scope of Work / Amendments)	P	S / I	Yes: After QC and OD	permanent retention is standard municipal government practice. Infrastructure, JPAs, and Mutual Aid contracts should be permanent for emergency preparedness. Contractors also have retention requirements. GC § 60201(b)
Admin. / General Manager / Board Support	GM-003	Annexations / Acquisitions	P	S / I	Yes: After QC and OD	records may relate to title to real property. (See GC § 60201(d)(8).) Department preference. GC § 60201(b)
Admin. / General Manager / Board Support	GM-004	Board of Directors Vacancies (Affidavit of Posting, Applications, Correspondence, Notices, etc.)	2 years	S / I	Yes: After QC and OD	Statute of Limitations for some Municipal Government actions is 3 - 6 months; CCP§335 et seq; GC §§60201, 65009(c)(1)
Admin. / General Manager / Board Support	GM-005	Deeds, Easements, Leases, Licenses, Rights of Way, Right of Entry, Final Order of Condemnation etc.	P	S / I	Yes: After QC and OD	GC § 60201(d)(8)
Admin. / General Manager / Board Support	GM-006	District Formation, Changes to Director's Boundaries (Redistricting), Shape Files	P	S / M / I	Yes: After QC and OD	records are part of the Agenda Packet, which is maintained permanently; district, and required for formal changes to the district, which is to be approved by the Board only. GC § 60201(b)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Admin. / General Manager / Board Support	GM-007	District's Counsel (Attorney) Opinions	Minimum 2 years	S / I	Yes: After QC and OD	Department preference. GC § 60201(b)
Admin. / General Manager / Board Support	GM-008	Elections - GENERAL, WORKING / ADMINISTRATION Files (Correspondence, Notices, Postings, Precinct Workers, County Election Services, etc.)	2 years	S / I	Yes: After QC and OD	Retention applies so records can be used as a model for the next election. GC § 60201(b)
Admin. / General Manager / Board Support	GM-009	Elections - HISTORICAL File (Sample ballot, copies of results / resolution declaring results)	P	S / I	Yes: After QC and OD	Records are of historical value and are therefore retained permanently. GC § 60201(b)
Admin. / General Manager / Board Support	GM-010	Elections - Petitions (Initiative, Recall / Referendum)	Minimum 8 months	S / I	Yes: After QC and OD	public access to petitions is restricted by law. Retention period applies after election results (if petition makes it to election) or petition's final review (if petition does not make it to election). Retention may continue to apply after 8 months if petition is involved in a legal action/proceeding, investigation, or examination. EC §§ 17200, 17400
Admin. / General Manager / Board Support	GM-011	Elections: Correspondence, Notifications / Publications, Certificate of Election, etc.	4 years	S / I	Yes: After QC and OD	records are to be retained for historical purposes. Department Preference. GC § 60201(b)
Admin. / General Manager / Board Support	GM-012	Ethics Training Certificates, Fiscal and Financial, for Board of Directors	5 years	S / I	Yes: After QC and OD	GC § 53235.2(b)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Admin. / General Manager / Board Support	GM-013	FPPC 700 Series Forms (Statement of Economic Interests): DESIGNATED EMPLOYEES / CONSULTANTS (specified in the District's Conflict of Interest code)	7 years	S / I	Yes: After QC	the District maintains the original statements. GC § 81009(e) and (g)
Admin. / General Manager / Board Support	GM-014	FPPC 700 Series Forms (Statement of Economic Interests): PUBLIC OFFICIALS (elected / not elected. Includes District Board Members, General Manager)	7 years	S / I	Yes: After QC	Department Preference; as of January 1, 2025, the FPPC is the Filing Officer for 87200 filers; District maintains copies only; original statements are filed with FPPC; GC §81009(f)&(g)
Admin. / General Manager / Board Support	GM-015	FPPC Form 801 (Gift to Agency Report)	7 years	S / I	Yes: After QC	records must be posted online on the District's website. GC § 81009(e)
Admin. / General Manager / Board Support	GM-016	FPPC Form 802 (Tickets Provided by Agency Report)	7 years	S / I	Yes: After QC	records must be posted online on the District's website. GC § 81009(e)
Admin. / General Manager / Board Support	GM-017	FPPC Form 803 (Behested Payment Report)	7 years	S / I	Yes: After QC	records must be posted online on the District's website. GC § 81009(e)
Admin. / General Manager / Board Support	GM-018	FPPC Form 806 (Agency Report of Public Official Appointments)	7 years	S / I	Yes: After QC	records must be posted online on the District's website. GC § 81009(e)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Admin. / General Manager / Board Support	GM-019	Historical Records: Copyrights, Logo, Mission Statements, Patents, Name Changes, Awards, Trademarks, Ravenswood Historically Significant records, Value Statement, Vision Statements, etc.	P	S / I	Yes: After QC and OD	the District Secretary determines the historical significance of these records. GC § 60201(b)
Admin. / General Manager / Board Support	GM-020	Insurance Certificates that are not filed with the Agreement / Contract	11 years	S / I	Yes: After QC and OD	Covers E&O Statute of Limitations; CCP §§336(a), 337 et. seq., GC § 60201(d)
Admin. / General Manager / Board Support	GM-021	Land Acquisition Projects	P	S / I	Yes: After QC and OD	records may relate to title to real property. (See GC § 60201(d)(8).) Department preference. GC § 60201(b)
Admin. / General Manager / Board Support	GM-022	Litigation Files / Lawsuits / Court Case Files	Minimum Final Resolution + 5 years	S / I	Yes: After QC and OD	records should be retained during pendency of litigation. Retention applies for a minimum of 5 years after resolution of litigation. Department preference. GC § 60201(b)
Admin. / General Manager / Board Support	GM-023	Minutes: District Board of Directors / Committees (Park Advisory, Measure Q Oversight, etc.)	P	S / I	Yes: After QC and OD	GC § 60201(d)(3))
Admin. / General Manager / Board Support	GM-024	Oaths of Office (Board of Directors)	Separation + 6 years	S / I	Yes: After QC and OD	retention period begins on director's separation from the department and/or District. Department preference. GC § 60201(b)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Admin. / General Manager / Board Support	GM-025	Ordinances / Regulations / Resolutions	P	S / I	Yes: After QC and OD	GC § 60201(b)
Admin. / General Manager / Board Support	GM-026	Public Records Act Requests	2 years	S / I	Yes: After QC and OD	records should be retained as a matter of course during pendency of Public Records Act request. Records should be retained during the pendency of a request. Retention continues to apply until 2 years after the disposition of a request . Department Preference. GC § 60201(b)
Admin. / General Manager / Board Support	GM-027	Real Estate Appraisals / Evaluations / Historic Structures Assessment	P	S / I	Yes: After QC and OD	Department preference; GC §60201
Admin. / General Manager / Board Support	GM-028	District Board: Recordings - AUDIO RECORDINGS of Meetings / Audio Tapes	Minimum 4 years			retention complies with applicable retention periods provided by law. (See GC § 54953.5.) Authority for Retention Department preference; Legally required for 30 days for audio; GC §§54953.5(b), 60201 et seq.
Admin. / General Manager / Board Support	GM-029	District Board: Recordings - VIDEO RECORDINGS of Meetings / Video Tapes	Minimum 4 years			retention complies with applicable retention periods provided by law. (See GC § 54953.5, 53161. Department preference; 60201(b)
Admin. / General Manager / Board Support	GM-030	Records Destruction Authorization Forms / Authorization to Destroy Paper to Rely on the Image as the Original	10 years	S / I	Yes: After QC and OD	GC § 60201(b)

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<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Admin. / General Manager / Board Support	GM-031	Records Retention Schedules - Authorization for Amendments to Retention Schedules	P	S / I	Yes: After QC and OD	GC § 60201(b)
Admin. / General Manager / Board Support	GM-032	Resolutions	P	S / I	Yes: After QC and OD	GC § 60201(b)
Admin. / General Manager / Board Support	GM-033	Secretary of State Statement of Facts	2 years	S / I	Yes: After QC and OD	Department preference; GC § 60201(b)
Admin. / General Manager / Board Support	GM-034	Subpoenas / Summons	2 years	S / I	Yes: After QC and OD	records should be retained during pendency of litigation. Retention applies for 2 years after resolution of litigation. GC § 60201(b)

RECORDS RETENTION SCHEDULE: FINANCE
(Admin, Accounting, Information Technology, Payroll, Purchasing)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
FINANCE / ADMINISTRATION						
Finance / Lead Div.	FIN-001	Financial System Database (Compass)	Minimum 7 years		Yes: After QC & OD	retention period (for employee compensation and reimbursements) is a minimum of 7 years after payment. Retention period may be indefinite since data is interrelated. GC § 60201(d)(12)
Finance / Admin.	FIN-002	Audits - Operational / Single Audits (Grant Audits, Internal Audits)	5 years	S / I	Yes: After QC and OD	Department preference. GC § 60201(b)
Finance / Admin.	FIN-003	Audits / Audit Reports / Annual Comprehensive Financial Report (ACFR)	P	S / I	Yes: After QC and OD	Department preference. GC § 60201(b)
Finance / Admin.	FIN-004	Bank Statements / Checking Account Reconciliation / Bank Reconciliation (Transaction Statements, Wire Transfers, Check Listing Audit Trail, Deposits, Treasury Statements, Trustee / Investment Statements, etc.)	7 years	S / I	Yes: After QC and OD	retention meets auditing standards. Records may include records pertaining to independent contractor's compensation, or expense reimbursement. Department Preference. GC § 60201(b)
Finance / Admin.	FIN-005	Bonds / Debt / COP / Certificates of Participation / Transcripts / Disclosure Reports / Lines of Credit / Promissory Notes / Commercial Paper	Fully Defeased or Matured + 10 years	S / I	Yes: After QC and OD	Department Preference; Statute of Limitations for Bonds issued by local governments are 10 years; IRS bond auditing regulations state, "...material records should generally be kept for as long as the bonds are outstanding, plus 3 years after the final redemption date of the bonds;" There are specific requirements for disposal of unused bonds; CCP §§336 et seq. 337.5(a); 26 CFR 1.6001-1(e); 26 CFR § 1.148-5(d)(6)(iii)(E); GC §43900 et seq. GC § 60201(b)
Finance / Admin.	FIN-006	Budget Adjustments	7 years	S / I	Yes: After QC and OD	GC § 60201(b)
Finance / Admin.	FIN-007	Budgets: Final (Adopted)	P	S / I	Yes: After QC and OD	Department preference. GC § 60201(b)
Finance / Admin.	FIN-008	Check Registers	7 years	S / I	Yes: After QC and OD	different versions of these records are presented to the Board. Records includes employee compensation or reimbursement. Department Preference. GC § 60201(b)

RECORDS RETENTION SCHEDULE: FINANCE
(Admin, Accounting, Information Technology, Payroll, Purchasing)

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<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Finance / Admin.	FIN-009	Developer Deposits / Trust Accounts (Deposits for Developer Projects)	Close + 5 years	S / I	Yes: After QC and OD	retention period begins after close. Retention meets auditing standards. Department preference. GC § 60201(b)
Finance / Admin.	FIN-010	Financial Ratings / Correspondence	5 years	S / I	Yes: After QC and OD	Department Preference. GC § 60201(b)
Finance / Admin.	FIN-011	Financial Reports: Journals, Ledgers, Reconciliations, Registers, Reports, Transaction Histories, Balance Sheets, Batch Proofs, Trial Balance, (MONTHLY / PERIODIC)	When No Longer Required	S / I	Yes: After QC and OD	Draft / Preliminary documents used to produce final year-end general ledger (financial database is the original); Department Preference. GC § 60202
Finance / Admin.	FIN-012	Investments (Including Arbitrage)	5 years	S / I	Yes: After QC and OD	Department Preference. GC § 60201(b)
Finance / Admin.	FIN-013	Journal Entries / Journal Vouchers	7 years	S / I	Yes: After QC and OD	retention meets municipal government auditing standards; Department Preference. GC § 60201(b)
Finance / Admin.	FIN-014	Local Government Compensation Report	5 years	S / I	Yes: After QC and OD	Department Preference. GC § 60201(b)
Finance / Admin.	FIN-015	Long Range Financial Plans / Reports	5 years	S / I	Yes: After QC and OD	Department Preference. GC § 60201(b)
Finance / Admin.	FIN-016	State Controller's Report / Special Districts Financial Transactions Report	5 years	S / I	Yes: After QC and OD	Department Preference. GC § 60201(b)
Finance / Admin.	FIN-017	Vehicle Titles ("Pink Slips")	Upon Sale or Disposal	S / I		Titles need not be retained after sale or disposal of a vehicle and are typically signed over to the new owner; Department preference. GC § 60201(b)
FINANCE / ACCOUNTING						
Finance / Accounting	FIN-018	1099's, 1096's, DE542 (California Report of Independent Contractors)	7 years	S / I	Yes: After QC and OD	retention period complies with applicable IRS requirements (generally 4 years) and FTB requirements (3 years). (See 29 USC § 436, IRS Reg. § 31.6001-1(e)(2); R and T § 19530.) GC § 60201(d)(12)
Finance / Accounting	FIN-019	Accounts Payable Source Records (includes Invoices, Credit Card Statements, Conference / Seminar Backup, Petty Cash, Travel Expense Reimbursements, etc.)	7 years	S / I	Yes: After QC and OD	records may contain independent contractor's compensation, expense reimbursement, or District credit card records; retention meets municipal government auditing standards; GC § 60201(d)(12)

RECORDS RETENTION SCHEDULE: FINANCE

(Admin, Accounting, Information Technology, Payroll, Purchasing)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Finance / Accounting	FIN-020	Accounts Receivable Source Records including Adjustments, Billings, Cash, Payments, Cash Receipts Damage to District Property / Insurance Payments, Leases, etc.	5 years	S / I	Yes: After QC and OD	retention meets municipal government auditing standards; Department preference; GC § 60201(b)
Finance / Accounting	FIN-021	Checks deposited to Bank (District scans them for the Bank, rather than physically taking the checks to the bank to deposit them.)	Follow Bank Instructions	S / I	Yes: After QC and OD	these are bank instruments, and not District records; Retain per bank agreement.
Finance / Accounting	FIN-022	Checks (Issued by the District, then cashed by the payee - maintained by the Bank)	7 years	S / I	Yes: After QC and OD	records may contain independent contractor's compensation; Retention meets municipal government auditing standards; GC § 60201(d)(12)
Finance / Accounting	FIN-023	Electronic Fund Transfer Agreements / Authorizations for direct deposit to vendors bank account	2 years	S / I	Yes: After QC and OD	Department Preference. GC § 60201(b)
Finance / Accounting	FIN-024	Financial Reports: General Ledger, Registers, etc.	When No Longer Required	S / I	Yes: After QC and OD	Financial database is the original Department Preference. GC § 60201(b)
Finance / Accounting	FIN-025	Grants (SUCCESSFUL - all records, including FEMA / OES claims (Federal Emergency Management Agency / Office of Emergency Services Claims)	Minimum 5 years	S / I	Yes: After QC and OD	District Preference (may include records pertaining to independent contractor's compensation, or expense reimbursement); Meets auditing standards; Uniform Admin. Requirements for Grants to Local Governments is 3 years from expenditure report or final payment of grantee or subgrantee; 2 CFR 200.334; 24 CFR 91.105(h), 92.505, 570.490, and 570.502; ; GC §60201; GC §8546.7
Finance / Accounting	FIN-026	Grants: UNSUCCESSFUL (Applications, Correspondence, etc.)	2 years	S / I	Yes: After QC and OD	Department Preference; GC §60201
Finance / Accounting	FIN-027	Returned Payments (NSF checks, etc.)	7 years	S / I	Yes: After QC and OD	retention meets municipal government auditing standards; GC § 60201(b)
Finance / Accounting	FIN-028	Tax Returns (Sales Tax, etc.)	5 years	S / I	Yes: After QC and OD	retention period complies with applicable IRS requirements (generally 4 years) and FTB requirements (3 years) GC § 60201(b);
Finance / Accounting	FIN-029	W-9's	Vendor Inactive + 3 years	S / I	Yes: After QC and OD	retention period begins when vendor is inactive. Retention meets IRS auditing standards. GC § 60201(b)"

RECORDS RETENTION SCHEDULE: FINANCE
(Admin, Accounting, Information Technology, Payroll, Purchasing)

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FINANCE / INFORMATION TECHNOLOGY						
Finance / Information Technology	FIN-030	Backups - All Disaster Recovery Computer Backups	When No Longer Required			Used for Disaster Recovery Purposes Only; Considered a copy and can be destroyed when no longer required; GC §60200 et seq.
Finance / Information Technology	FIN-031	Network Configuration Maps / Plans	When No Longer Required			Preliminary documents not retained in the ordinary course of business; GC §60201 et seq.
Finance / Information Technology	FIN-032	Software Licenses, Warrantees, Installation Media	When No Longer Required			Department preference; GC §60201 et seq.
Finance / Information Technology	FIN-033	UNALTERABLE MEDIA / IMMUTABLE MEDIA (Cloud Immutable Backup) , WORM / DVD-r / CD-r / Blue Ray-R / other unalterable media that does not permit additions, deletions, / changes	Follows Retention of Official Electronic Record			For legal compliance for Trustworthy Electronic Records (when the electronic record serves as the official record); must be stored in a "safe and separate location"; GC 60201, 12168.7, EVC 1550, 2 CCR 22620 et seq.
Finance / Information Technology	FIN-034	Video Recordings - Department Activity (Employees Performing Work, Cashiering, Building Security, etc.)	1 year			Records regular and ongoing operations of the special district, or records building security; GC §§60201, 53160
Finance / Information Technology	FIN-035	Video Recordings - Public Areas / Public Activity	When No Longer Required			Does Not record regular and ongoing operations of the special district, nor building security; GC §§60201, 53161

RECORDS RETENTION SCHEDULE: FINANCE

(Admin, Accounting, Information Technology, Payroll, Purchasing)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
FINANCE / PAYROLL						
Finance / Payroll AND Human Resources	FIN-036	_ERP / Payroll Database (Compass)	Minimum 7 years	S / I	Yes: After QC & OD	retention period (for employee compensation and reimbursements) is a minimum of 7 years after payment. Retention period may be indefinite since data is interrelated. GC § 60201(d)(12)
Finance / Payroll	FIN-037	DE-6, DE-9. DE-43, W-3, / DE-166, / 941 Forms - Quarterly Payroll Tax Returns (Federal / State) IRS 5500 Forms (Employee Benefit Plans), PERS / FICA / Medicare Adjustments - OASDI, Federal Tax Deposits, Adjustments, etc.	7 years	S / I	Yes: After QC and OD	retention period complies with applicable IRS requirements (generally 4 years) and FTB requirements (3 years). GC § 60201(b)
Finance / Payroll	FIN-038	Employee Payroll File	Separation + 7 years	S / I	Yes: After QC and OD	retention period begins after employee's separation. Department preference. GC § 60201(b)
Finance / Payroll	FIN-039	Garnishments, Child Support, Court Orders regarding Employee Wages	Completion + 7 years	S / I	Yes: After QC and OD	retention period begins after completion of payments. Department preference. GC § 60201(b)
Finance / Payroll	FIN-040	Payroll Checks	7 years	S / I	Yes: After QC and OD	GC §60201(d)(12),
Finance / Payroll	FIN-041	Payroll Registers / Payroll Reports	7 years	S / I	Yes: After QC and OD	GC §60201(b),
Finance / Payroll	FIN-042	Timesheets	7 years	S / I	Yes: After QC and OD	retention meets auditing standards. Department preference. GC § 60201(b)
Finance / Payroll	FIN-043	W-2's	7 years	S / I	Yes: After QC and OD	retention period complies with applicable IRS requirements (generally 4 years) and FTB requirements (3 years). GC § 60201(b), 26 CFR §31.6001-1(e)(2), R and T §19530; 29 CFR 516.5 - 516.6, 29 USC 436
Finance / Payroll	FIN-044	W-4's	No Longer in Effect + 4 years	S / I	Yes: After QC and OD	retention period complies with applicable IRS requirements (generally 4 years) and FTB requirements (3 years). GC § 60201(b), 26 CFR 31.6001-1

RECORDS RETENTION SCHEDULE: HUMAN RESOURCES (Risk Management)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
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<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
HUMAN RESOURCES						
Finance and Human Resources	HR-001	_ERP / Payroll Database (Compass)	Minimum 7 years	S / I	Yes: After QC & OD	retention period (for employee compensation and reimbursements) is a minimum of 7 years after payment. Retention period may be indefinite since data is interrelated. GC § 60201(d)(12)
Human Resources	HR-002	Affirmative Action Complaints - California Civil Rights Department (CRD) / Department of Fair Employment / Housing (DFEH) / Equal Opportunity Commission (EEOC) / Harassment Claims	Final Disposition + 4 years	S / I	Yes: After QC and OD	retention period begins on final disposition of formal complaint. Retention matches personnel files retention and complies with state and federal law. (See 2 CCR § 11013(c); GC §§ 12946, 12960.) Department preference. GC § 60201(b)
Human Resources	HR-003	Benefit Cost Comparison Reports / Review of Employee Benefit Plans	When No Longer Required	S / I	Yes: After QC and OD	Preliminary Drafts / Content Not Substantive / Transitory records not retained in the ordinary course of business; GC § 60201(b)
Human Resources	HR-004	Benefit Plans - Employee Benefit Policies (Benefits: Health, Eye, Dental, Life Insurance, Long Term Disability, State Disability, Unemployment Insurance, etc.)	Plan Superseded + 6 years	S / I	Yes: After QC and OD	retention period begins when the benefit plan is superseded by a new or updated plan. Retention complies with applicable federal and state law. (See 29 USC § 1027, 29 CFR § 1627.3(b)(2); 28 CCR § 1300.85.1.) GC § 60201(b)
Human Resources	HR-005	Classification / Compensation Studies / Surveys	Final Disposition + 3 years	S / I	Yes: After QC and OD	retention period begins on final disposition of studies/surveys. Department preference. GC § 60201(b)
Human Resources	HR-006	DMV Pull Notices (print only those with violations)	When Superseded or Separation	S / I	Yes: After QC and OD	retention period applies during use of the pull notice (a DMV record that the District considers a non-record used for reference) District preference. GC § 60201(b)
Human Resources	HR-007	Drug / Alcohol Test Results (All - Positives / Negatives)	5 years	S / I	Yes: After QC and OD	retention complies with federal and state law. (See 29 CFR § 1627.3(b)(1)(v) [EEOC/FLSA/ADEA (Age)], 49 CFR 655.71 et seq., 49 CFR 382.401 et seq. [USDOT]; GC §§ 12946, 12960.) GC § 60201(b)

RECORDS RETENTION SCHEDULE: HUMAN RESOURCES (Risk Management)

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<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Human Resources	HR-008	Employee Investigations / Complaints	Separation + 6 years	S / I	Yes: After QC and OD	retention period begins on employee's separation from the Department. Retention complies with federal and state law. (See 29 CFR § 1602.1 et seq., 29 CFR §§ 1627.3(a)(5) and (6); GC §§ 12946, 12960, 2 CCR § 11013(c), 8 CCR § 11040(7)(c).) Department preference. GC § 60201(b)
Human Resources	HR-009	I-9s	Separation + 3 years	S / I	Yes: After QC and OD	retention period begins on employee's separation from District/Department employment. Retention complies with federal and state law. (See 8 USC § 1324a(b)(3) [INA § 274A(b)(3)], 8 CFR § 274a.2, 29 CFR § 1627.3(b)(1)(i); GC §§ 12946, 12960.) GC § 60201(b)+I1
Human Resources	HR-010	Legal Opinions (Employment Related)	Minimum 10 years	S / I	Yes: After QC and OD	Department preference. GC § 60201(b)
Human Resources	HR-011	Livescan Results / Livescan Applications	1 year	S / I	Yes: After QC and OD	Department preference. GC § 60201(b)
Human Resources	HR-012	OSHA Log 300, 300 A, 301, 301A, etc.	5 years	S / I	Yes: After QC and OD	retention complies with federal and state law. (See 29 CFR § 1904.33, OMB 12200029; 8 CCR § 14300.33.) Department preference. GC § 60201(b)

RECORDS RETENTION SCHEDULE: HUMAN RESOURCES (Risk Management)

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<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Human Resources	HR-013	Personnel Files - General File (Includes Application, Awards, Backgrounds, Employee Benefit Enrollment Forms, Disciplinary Actions, Certifications, Commendations, Harassment Prevention Training Certificates, Evaluations, Grievances, Licenses, Lifeguard Certifications, Performance Reviews, Personnel Action Forms (original), Policy acknowledgements, Oaths / Disaster Service Workers Oaths, Employee Settlement Agreements Training Certificates, etc. - Excludes Medical Records) Required Information for all Employee Training (if records are created): Employee Name Training Provider's Name Date Duration (length) Core Competencies / Skills Certifications / Qualifications	Separation + 6 years	S / I	Yes: After QC and OD	retention period begins on employee's separation from Department/District employment. Retention complies with federal and state law. (See 29 CFR §§ 1602.14, 1602.31 and 1627.3(b)(1)(ii) [EEOC/FLSA/ADEA 3-year retention period]; GC § 53235.2(b) [5-year retention period for ethics training records]; GC § 53237.2(b) [5-year retention period for sexual harassment training records]; GC § 3105 [oath of office]; LC § 1198.5 [grievances].) Authority for Retention:: Department preference. GC § 60201(b) LC §1198.5
Human Resources	HR-014	Personnel Files - Medical File (Confidential) (Includes background checks, Class B medicals, Family Medical Leave records, hearing tests (Audiograms), miscellaneous medical records, pre-employment physicals, etc.)	Separation + 30 years, or Termination of Benefits + 5 years, whichever is longer	S / I	Yes: After QC and OD	maintain files separately. 30-year retention period applies after employee separation since claims can be made for 30 years for toxic substance exposure (, 8 CCR § 5144(m), 29 CFR § 1910.1020(d)(1)(i)), and 5-year retention period applies after termination of benefits (see 8 CCR § 10102, 8 CCR § 15400.2). Apply the longer of the two retention periods at separation and/or termination of benefits. Department preference. GC § 60201(b)"
Human Resources	HR-015	Recruitment Files: Applications for Employment / Resumes / Recruitment Files: Solicited: Brochure, advertisement, unsuccessful applications (with / without interviews), selection materials, interview notes, results, etc.	4 years	S / I	Yes: After QC and OD	retention period complies with federal and state law. Federal law requires 1-3 years (see 29 CFR § 1627.3(b)(1)(i), 29 CFR § 1602.14 et seq.) and state law requires 2-3 years (see 2 CCR § 11013(c)). Department preference. GC § 60201(b)"

RECORDS RETENTION SCHEDULE: HUMAN RESOURCES (Risk Management)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Human Resources	HR-016	Unemployment Claims	Final Disposition + 5 years	S / I	Yes: After QC and OD	retention period begins on final disposition of claim Department preference. GC § 60201(b)
Human Resources	HR-017	Verifications of Employment, Child Support, etc. (From lenders / other outside companies)	When No Longer Required	S / I	Yes: After QC and OD	Not as Agency record / Content does NOT relate in a substantive way to the conduct of the public's business; GC § 60201(b)
Human Resources	HR-018	Volunteer Applications / Agreements - Unsuccessful / Pending Applicants	3 years	S / I	Yes: After QC and OD	Department preference since courts treat volunteers as employees, retention is consistent with employee personnel files. (See 29 CFR §§ 1602.31 and 1627.3(b)(ii), ; GC §§ 12946, 12960.) GC § 60201(b)
Human Resources	HR-019	Volunteer Applications / Agreements (includes emergency contact information) - Successful Applicants	Inactive / Separation + 3 years	S / I	Yes: After QC and OD	Department preference since courts treat volunteers as employees, retention is consistent with employee personnel files. (See 29 CFR §§ 1602.31 and 1627.3(b)(ii), ; GC §§ 12946, 12960.) GC § 60201(b)
Human Resources	HR-020	Work Permits (for minors, issued by the School District)	Upon Expiration of Permit	S / I	Yes: After QC and OD	GC § 60201(b)
Human Resources	HR-021	Workers Compensation Files ALL	Separation + 30 years, or Termination of Benefits + 5 years, whichever is longer	S / I	Yes: After QC and OD	retention period complies with federal and state law. Federal law requires 1-3 years (see 29 CFR § 1627.3(b)(1)(i), 29 CFR § 1602.14 et seq.) and state law requires 2-3 years (see 2 CCR § 11013(c)). Department preference. GC § 60201(b)

RECORDS RETENTION SCHEDULE: HUMAN RESOURCES (Risk Management)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
HUMAN RESOURCES / RISK MANAGEMENT						
Human Resources / Risk Management	HR-022	Accident / Incident Reports - Members of the Public injured on District property - NO Claim Received	2 years	S / I	Yes: After QC and OD	GC §60201(b)
Human Resources / Risk Management	HR-023	Actuarial Reports	5 years	S / I	Yes: After QC and OD	Department Preference; Retained to match meets municipal government auditing standards; GC §60201(b)
Human Resources / Risk Management	HR-024	Claim for Damages / Claims Against the District	Final Resolution + 5 years	S	Yes: After QC and OD	Department Preference; Meets municipal government auditing standards; Statute of Limitations is 4 years; CCP §§337 et seq., 343; GC §60201(b),
Human Resources / Risk Management	HR-025	Claims to Recover Funds for the District: Subrogation Claims:/ Property Damage Claims / Restitution / Recovery of Damages to District Property / District's Invoices to Insurance Companies	Final Resolution + 2 years	S / I	Yes: After QC and OD	Department preference; GC §60201(b)
Human Resources / Risk Management	HR-026	Insurance Policies - General Liability, Property, Fire, Theft, etc. (JPIA)	Expiration + 4 years	S / I	Yes: After QC and OD	Department Preference; Covers statute of limitations for contracts; CCP §337 et seq.; GC §60201(b)
Human Resources / Risk Management	HR-027	Insurance Policies - Workers Compensation Excess Liability (JPIA)	Expiration + 30 years	S / I	Yes: After QC and OD	Department Preference; Covers statute of limitations; CCP §337 et seq.; , 8 CCR 5144, 8 CCR 15400.2; 29 CFR 1910.1020(d)(1)(i); GC §§ 911.2, 60201
Human Resources / Risk Management	HR-028	Litigation / Lawsuits	Final Resolution + 5 years	S	Yes: After QC and OD	Department Preference; Meets municipal government auditing standards; Statute of Limitations is 4 years; CCP §§337 et seq., 343; GC §60201(b),
Human Resources / Risk Management	HR-029	OSHA Citations / Inspections	7 years	S / I	Yes: After QC and OD	Department preference; OSHA requires 5 years (State is required to retain theirs 7 years); State law requires 2 years; 8 CCR §3203(b)(1), OMB 1220-0029; GC §60201(b); LC §6429c

RECORDS RETENTION SCHEDULE: HUMAN RESOURCES (Risk Management)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Human Resources / Risk Management	HR-030	Workplace Violence – Hazard identification, evaluation, correction, incident logs, investigations, etc.	5 years	S / I	Yes: After QC and OD	LC §6401.9(f), GC §60201(b)

RECORDS RETENTION SCHEDULE: MAINTENANCE

(Capital Improvement Projects, Fleet Maintenance, Parks Trail Maintenance)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
MAINTENANCE / CAPITAL IMPROVEMENT PROJECTS						
Maint. / CIP	MNT-001	CEQA Documents: Environmental Determinations: Environmental Impact Reports (EIRs), Negative Declarations, Categorical Exemptions, etc.) Correspondence / Staff Notes that provide insight into the project / the agency's CEQA compliance with respect to the project	Project Approval or Denial + 180 days	S / I	Yes: After QC and OD	Not all internal communications and notes are required to be saved; "E-mails that do not provide insight into the project or the agency's CEQA compliance with respect to the project — are not within the scope of section 21167.6, subdivision (e) and need not be retained." Golden Door Properties, LLC v. Superior Court of San Diego County (County of San Diego, et al., Real Parties in Interest) (53 Cal.App.5th 733); PRC 21167,6; Confer with District's attorney first to confirm retention. GC § 60201(d)(4)
Maint. / CIP	MNT-002	Encroachment Permits / Excavation Permits: Temporary (Street Permits, Temporary Construction, Sidewalk Repairs, Traffic Control, Utility Cuts etc.) Includes Insurance Certificates	Final / Completion + 2 years	S / I	Yes: After QC and OD	GC § 60201(b)
Maint. / CIP	MNT-003	Encroachments - Permanent (Permanent structures in the District's Right of Way)	P	S / I	Yes: After QC and OD	Department preference. GC §60201(b)
Maint. / CIP	MNT-004	Engineering Project Files / CIP (Capital Improvement Project) Files - Administration File: Project Administration, Construction Photos, Cost of Construction, Field Inspection Reports / Inspection Diaries, Insurance Certificates, Preliminary Design Studies, Project Schedules, Real Estate Appraisals, Safety. SWPPP, USAs, etc.	Completion + 10 years or After Funding Agency Audit, if required, whichever is longer	S / I	Yes: After QC and OD	Statute of Limitations for written contracts are four years from the date of breach; errors and omissions is 10 years; Death during construction is 10 years; CCP §§337., 337.1(a), 337.15 GC §60201, Contractor has retention requirements in 48 CFR 4.703

RECORDS RETENTION SCHEDULE: MAINTENANCE

(Capital Improvement Projects, Fleet Maintenance, Parks Trail Maintenance)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Maint. / CIP	MNT-005	Engineering Project Files / CIP (Capital Improvement Project) Files - Close-Out File: Preliminary Notices, Stop Work Notices, Temporary Permits, Project Calculations, SAMPPs, SWPPP, etc.	Upon Completion	S / I	Yes: After QC and OD	Department preference; Statutes of limitations are not applicable to these records. GC § 60201(b)
Maint. / CIP	MNT-006	Engineering Project Files / CIP (Capital Improvement Project) Files - Permanent File: Change Orders, Deeds, Easements, Engineering Studies / Reports Environmental Documents (Final EIRs, Categorical Exemptions, Negative Declarations), Materials Testing Reports, NIB (Notice Inviting Bids), Notice of Completion, Regulatory Agency Approvals, RFPs (Request for Proposal), RIB (Request Inviting Bids), Right of Way, Shop Drawings, Soils Reports, Specifications, Structural Plans, Submittals, Surveys, Permanent Variances, etc.	P	S / I	Yes: After QC and OD	For Disaster Recovery Purposes; Final environmental determinations are required to be kept a "reasonable period of time"; 14 CCR §15095(c); GC §60201 et seq.
Maint. / CIP	MNT-007	Engineering Project Files / CIP (Capital Improvement Project) Files / Private Development Infrastructure - Permanent File - Large Format Drawings Design Drawings (finals), Record Drawings ("As Builts")	P	S / I	Yes: After QC and OD	For disaster preparedness purposes; GC §60201 et seq.
Maint. / CIP	MNT-008	Geographic Information System (GIS)	Indefinite	S / I	Yes: After QC and OD	Data is interrelated.; GC § 60201(b)
Maint. / CIP	MNT-009	Master Plans / Open Space Master Plans / Parks Master Plan / Park History Files / Interpretive Park Plans	P	S / I	Yes: After QC and OD	Department policy. GC § 60201(b)
Maint. / CIP	MNT-010	Materials Boards	When No Longer Required	S / I	Yes: After QC and OD	Preliminary drafts not retained in the ordinary course of business; Department policy. GC § 60201(b)

RECORDS RETENTION SCHEDULE: MAINTENANCE

(Capital Improvement Projects, Fleet Maintenance, Parks Trail Maintenance)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Maint. / CIP	MNT-011	Planning Project Files / Land Use Plans (Includes Associated CEQA Noticing, AB52 (Tribal Cultural Resources), Conditions of Approval, Public Noticing, Environmental Determinations, CEQA Compliance Reports Staff Reports, Plans / Maps)	P	S / I	Yes: After QC and OD	Department preference; final environmental determinations must be kept for a "reasonable period of time"; GC § 60201(b); 14 CCR § 15095(c)
MAINTENANCE / MAINTENANCE						
Maint. / Lead Div.	MNT-012	Air Quality Management District (AQMD) Permits / Applications (Generators, Construct, Operate, etc.)	Expiration + 5 years	S / I	Yes: After QC and OD	retention period begins on expiration of permit. (See 40 CFR § 70.6.) GC § 60201(b)
Maint. / Maint.	MNT-013	Daily Diaries / Daily Activities (Playground Equipment, Sidewalk Maintenance, Tree Maintenance)	10 years	S / I	Yes: After QC and OD	Department preference. GC § 60201(b)
Maint. / Maint.	MNT-014	Daily Vehicle Inspections / Daily Equipment Checks	2 years	S / I	Yes: After QC and OD	GC § 60201(b)
Maint. / Lead Div.	MNT-015	Generator Operation Logs / Inspections	5 years	S / I	Yes: After QC and OD	AQMD Rule 1470; Form 400-E-13a instructions; GC § 60201(b)
Maint. / Maint.	MNT-016	Hazardous Tree Forms / Maintenance Pruning (Heritage Trees)	10 years	S / I	Yes: After QC and OD	Department preference. GC § 60201(b)
Maint. / Maint.	MNT-017	Herbicide Application / Pesticide Application / Use	2 years	S / I	Yes: After QC and OD	retention complies with state law. (See 3 CCR § 6623(c).) Department preference. GC § 60201(b)
Maint. / Maint.	MNT-018	Inspections: Bicycle Ways, Curbs, Sidewalks, Trails, etc.	10 years	S / I	Yes: After QC and OD	Department preference. GC § 60201(b)
Maint. / Maint.	MNT-019	On Call, Stand-by Sheets	When No Longer Required	S / I	Yes: After QC and OD	Department preference. GC § 60201(b)
Maint. / Lead Div.	MNT-020	Operations / Maintenance Manuals / O&M Manuals	Disposal of Equipment	S / I	Yes: After QC and OD	retention no longer applies upon disposal of equipment. Department preference. GC § 60201(b)

RECORDS RETENTION SCHEDULE: MAINTENANCE

(Capital Improvement Projects, Fleet Maintenance, Parks Trail Maintenance)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Maint. / Lead Div.	MNT-021	Pressure Vessel Certifications / Permits (Air Compressors, CNG Tank, Propane, etc.)	Current	S / I	Yes: After QC and OD	retention applies for current versions of certification or permit (i.e., former versions need not be retained). Department preference. GC § 60201(b).
Maint. / Maint.	MNT-022	Pre-Trip Inspections / Vehicle Safety Checks / Daily Equipment Checks	90 days	S / I	Yes: After QC and OD	retention complies with state law. (See 13 CCR § 1234(e).) GC § 60201(b)
Maint. / Lead Div.	MNT-023	Standard Operating Procedures / SOPs	Superseded	S / I	Yes: After QC and OD	retention of prior versions of SOPs is no longer required when superseded by new or updated versions of SOPs. Department preference. GC § 60201(b)
Maint. / Maint.	MNT-024	Swimming Pool Chemical Additions, Incidents (feces in pool, etc.)	5 years	S / I	Yes: After QC and OD	Department preference. GC § 60201(b)
Maint. / Maint.	MNT-025	Tree History	5 years	S / I	Yes: After QC and OD	Department preference. GC § 60201(b)
Maint. / Maint.	MNT-026	Underground Service Alerts (USA's) / Dig Alerts	3 years	S / I	Yes: After QC and OD	Department Preference; entered into DigAlert Software the Excavator, Operator and the Regional Notification Center all have an obligation to retain the notice for 3 years; GC §§4216.2(f); GC §60201
Maint. / Maint.	MNT-027	Used Oil Disposal	3 years	S / I	Yes: After QC and OD	retention complies with state law. (See 22 CCR § 66266.130(c)(5), H and SC §§ 25250.18(b), 25250.19(a)(3).) GC § 60201(b)
Maint. / Maint.	MNT-028	Vehicle, Equipment / Radio History Files Maintenance, CHP tickets, Smog Certificates, Registrations	Disposal of Vehicle or Equipment + 2 years	S / I	Yes: After QC and OD	retention period begins on disposal of vehicle or equipment. Retention complies with federal and state law. (See 49 CFR § 396.21(b)(1) [14-month retention], 49 CFR § 396.3(c) [18-month retention]; 13 CCR § 1234(f) [1-year retention].) Department preference. GC § 60201(b)

RECORDS RETENTION SCHEDULE: MAINTENANCE

(Capital Improvement Projects, Fleet Maintenance, Parks Trail Maintenance)

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<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Division Providing Service / Work	MNT-029	Work Orders / Service Requests / Investigations - All Information Entered in CMMS Database	When No Longer Required	S / I	Yes: After QC & OD	Preliminary drafts (the database is the original); Department Preference. GC § 60201(b)
Division Providing Service / Work	MNT-030	Work Orders / Service Requests / Investigations - NOT entered in CMMS Database (/ partial information entered into CMMS Database) (Division providing service retains originals; Division requesting service is considered a copy)	5 years	S / I	Yes: After QC & OD	Department Preference. GC § 60201(b)
Division Providing Service / Work	MNT-031	Work Orders / Service Requests / Meter History / CMMS DATABASE (Computerized Maintenance Management System) - Tyler	Indefinite - Minimum 5 years	S / I	Yes: After QC & OD	retention period is a minimum of 5 years but may be indefinite. Retention complies with state law. (See 17 CCR § 7605(f).) Department preference. GC §60201(b)

RECORDS RETENTION SCHEDULE: RECREATION **(Open Space, Rangers / Park Police, Recreation)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
RECREATION / OPEN SPACE						
General Manager / Board Support	REC-001	Deeds, Easements, Leases, Licenses, Rights of Way, Right of Entry, Final Order of Condemnation etc.	Copies - Send Originals to General Manager	S / I	Yes: After QC'd and OD	Originals are sent to the General Manager. GC § 60200
General Manager / Board Support	REC-002	Land Acquisition Projects	Copies - Send Originals to General Manager	S / I	Yes: After QC'd and OD	Originals are sent to the General Manager. GC § 60200
Recreation / Open Space	REC-003	Open Space / Natural Resources Studies / Reports (Includes Grazing Management Plans, etc.)	P	S / I	Yes: After QC'd and OD	Department preference. GC § 60201(b)
Recreation / Open Space	REC-004	Open Space History Files	P	S / I	Yes: After QC'd and OD	Department preference. GC § 60201(b)
Recreation / Open Space	REC-005	Open Space Public Activity / Event Sign-in / Release of Liability / Photo Release	2 years	S / I	Yes: After QC and OD	Department preference. GC § 60201(b)
Recreation / Open Space	REC-006	Open Space Use Permits	Expiration + 2 years	S / I	Yes: After QC and OD	Department preference. GC § 60201(b)
General Manager / Board Support	REC-007	Real Estate Appraisals / Evaluations / Historic Structures Assessment	Copies - Send Originals to General Manager	S / I	Yes: After QC and OD	Originals are sent to the General Manager. GC § 60200

RECORDS RETENTION SCHEDULE: RECREATION (Open Space, Rangers / Park Police, Recreation)

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RECREATION / RANGERS / SECURITY						
Recreation / Rangers / Security	REC-008	Accident / Incident / Injury Reports: PUBLIC / VISITORS (Fires, First Aid, Minor Medical, non-medical)	3 years	S / I	Yes: After QC and OD	3 years is Recommended by State Fire Marshall for adults; Statute of Limitations for Health Providers is 3 years; Juveniles are required until patient becomes 18 years old; CCP §340.5, GC §60201
Recreation / Rangers / Security	REC-009	Citations (Parking Infractions / Misdemeanors Traffic, Criminal, Marijuana / Cannabis Citations / Reports. etc.)	2 years	S / I	Yes: After QC and OD	Department preference. GC § 60201(b)
Recreation / Rangers / Security	REC-010	Daily Activity Logs: Patrol	When No Longer Required	S / I	Yes: After QC and OD	Department Preference; GC §60201
Recreation / Rangers / Security	REC-011	Department-level / Division-level Employee Records (includes original employee evaluations) - Ranger Department Employees	Separation + 10 years	S / I	Yes: After QC and OD	Department Preference; Ensure records kept in Department files comply with policy; Original Reprimands are retained in Department's folder; State and Federal laws require 2 -3 years; 29 CFR 1602.31 and 1627.3(b)(ii), 8 CCR §3204(d)(1) et seq., GC §§12946, 60201
Recreation / Rangers / Security	REC-012	Incident Reports to Security Departments (Graffiti, trespassing)	2 years	S / I	Yes: After QC and OD	GC §60201, PC §802
Recreation / Rangers / Security	REC-013	Internal Affairs Investigations (Exonerated, Unfounded / Not Sustained) - WITH Sustained Finding of Misconduct	Final Disposition + 15 years	S / I	Yes: After QC and OD	Department preference (not Peace Officers); PC §832.7; GC §60201
Recreation / Rangers / Security	REC-014	Internal Affairs Investigations (Exonerated, Unfounded / Not Sustained) - WITHOUT Sustained Finding of Misconduct	Final Disposition + 5 years	S / I	Yes: After QC and OD	Department preference (not Peace Officers); Consistent with Lexipol Policy; State requires for at least 5 years; other State and Federal laws require retention until final disposition of formal complaint; State requires 4 years after action is taken; Statute of Limitations is 4 years after the discovery of the offense for misconduct in office; for misconduct; EVC §1045(b)(1) , GC §§12946, 12960, 60201, PC §§801.5, 803(c), 832.5, VC §2547
Recreation / Rangers / Security	REC-015	Logs / Daily Logs	2 years	S / I	Yes: After QC and OD	Department preference. GC § 60201(b)

RECORDS RETENTION SCHEDULE: RECREATION **(Open Space, Rangers / Park Police, Recreation)**

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Recreation / Rangers / Security	REC-016	Officer Recordings: Body-Worn Cameras – LOGS of Access / Deletion of Data	P	S / I	Yes: After QC and OD	PC§ 832.18(b)(5)(E); GC §60201.6 et seq.
Recreation / Rangers / Security	REC-017	Officer Recordings: Body-Worn Cameras - that ARE evidence, Officer Involved Shootings / Detention / Arrest / Complaints	Follows the Retention of the Evidence, Minimum 2 years	S / I	Yes: After QC and OD	PC§ 832.18(b)(5)(B)and(C); GC §60201.6 et seq.
Recreation / Rangers / Security	REC-018	Officer Recordings: Body-Worn Cameras - that are NOT evidence	Minimum 60 days	S / I	Yes: After QC and OD	PC§ 832.18(b)(5)(A); GC §60201.6 et seq.
Recreation / Rangers / Security	REC-018.5	Recordings: Body-Worn Cameras – Accidental Recordings Reviewed and Approved for Deletion (Non-evidentiary)	After Approval	S / I	Yes: After QC and OD	Department preference; consistent with Lexipol policies (review, supervisory authorization, and documentation required); PC§ 832.18 et seq. GC §60201.6 et seq.
Recreation / Rangers / Security	REC-019	Officer Recordings: Mobile Audio Video (MAV) Recordings - that are NOT evidence	2 years	S / I	Yes: After QC and OD	Recordings that become evidence are stored with evidence - these are preliminary documents / transitory recordings; Lexipol 446.10.1; GC §60201.6 et seq.
RECREATION / RECREATION						
Recreation / Lead Div.	REC-020	_Registration Database	Indefinite - Minimum 2 years	S / I	Yes: After QC & OD	Department preference (Data is inter-related); GC § 60201(b)
Recreation / Recreation	REC-021	Agreements / Contracts: Instructors, Performers, Custodial Services, etc.	Completion + 2 years	S / I	Yes: After QC and OD	Department preference. GC § 60201(b)
Recreation / Recreation	REC-022	Activity / Special Programs / Event Files Children's Programs, Cultural Arts, Sports, Seniors, Filming, Theatre Programs etc.	Minimum 2 years	S / I	Yes: After QC'd and OD	Department preference. GC § 60201(b)
Recreation / Recreation	REC-023	Equestrian: District-owned Horses	Disposal of Animal + 3 years	S / I	Yes: After QC'd and OD	Department preference. GC § 60201(b)

RECORDS RETENTION SCHEDULE: RECREATION (Open Space, Rangers / Park Police, Recreation)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Recreation / Recreation	REC-024	Activity Guide / Class Guide / Program Guide (Final)	Minimum 2 years	S / I	Yes: After QC'd and OD	Department preference. GC § 60201(b)
Recreation / Lead Div.	REC-025	Applications / Participants' Registration / Liability Forms / Release of Liability Forms / Photo Releases / Waivers of Liability / Permissions: Camps, Field Trips, Authorization to give Medicine, etc.	2 years	S / I	Yes: After QC'd and OD	GC § 60201(b)
Recreation / Recreation	REC-026	Evaluations / Surveys (Program Feedback / Evaluations)	When No Longer Required	S / I	Yes: After QC and OD	Preliminary Drafts / Content Not Substantive / Transitory records not retained in the ordinary course of business); GC § 60201(b)
Recreation / Recreation	REC-027	Facility Use Permits, Shelter Reservations / Equipment Applications, Books, Waivers Includes Certificates of Insurance	2 years	S / I	Yes: After QC and OD	GC § 60201(b)
Recreation / Recreation	REC-028	Incident Reports	2 years	S / I	Yes: After QC'd and OD	GC § 60201(b)
Recreation / Lead Div.	REC-029	Inspections	2 years	S / I	Yes: After QC and OD	GC § 60201(b)
Recreation / Recreation	REC-030	Instructor Class Information	When No Longer Required	S / I	Yes: After QC and OD	Preliminary Drafts / Content Not Substantive / Transitory records not retained in the ordinary course of business); GC § 60201(b)
Recreation / Recreation	REC-031	Liability Waivers (if separate from another record)	2 years	S / I	Yes: After QC'd and OD	GC § 60201(b)
Human Resources	REC-032	Lifeguard Certifications	Copies - Send Originals to Human Resources	S / I	Yes: After QC'd and OD	Retain copy on site while an employee; GC § 60200

RECORDS RETENTION SCHEDULE: RECREATION **(Open Space, Rangers / Park Police, Recreation)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Image (I=Import M=Mfr S=Scan)	Destroy Paper?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for District-Wide Standards.</i>						
<i>Retentions begin when the act is completed (unless otherwise noted), and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Recreation / Lead Div.	REC-033	Registration Forms / Parent Release / Trip Permits / Day Trips / Fee / Charge / Liability Forms / Release of Liability Forms / Permissions, etc.: Camps, Field Trips, Authorization to give Medicine, etc.	2 years	S / I	Yes: After QC and OD	GC § 60201(b)
Recreation / Lead Div.	REC-034	Permits / Use Permits	Completion + 2 years	S / I	Yes: After QC and OD	Department preference. GC § 60201(b)
Recreation / Lead Div.	REC-035	Sign-in Sheets	2 years	S / I	Yes: After QC and OD	GC § 60201(b)
Recreation / Lead Div.	REC-036	Special Event Contracts (Includes ABC License / Insurance Certificates)	Completion + 2 years	S / I	Yes: After QC and OD	Department preference. GC § 60201(b)
Recreation / Recreation	REC-037	User Groups - Rosters, Waivers, Applications, Ejection Letters, Injury Reports	When No Longer Required	S / I	Yes: After QC and OD	Preliminary Drafts / Content Not Substantive / Transitory records not retained in the ordinary course of business); GC § 60201(b)

CELEBRATING

70
Years

1956-2026

DIVE-IN MOVIE NIGHT

at Cottage Pool

Enjoy an evening swim, then relax
poolside with a family-friendly movie on
the big screen under the stars!



FRIDAY, JULY 10, 2026: SPONGEBOB: SEARCH FOR SQUARE PANTS

FRIDAY, AUGUST 14, 2026: SUPER MARIO BROTHERS GALAXY MOVIE



PUBLIC SWIM:

7:00 PM – 8:30 PM



MOVIE BEGINS:

APPROXIMATELY 9:00 PM



SWIM ADMISSION:

\$5 PER PERSON



MOVIE ADMISSION:

FREE



COTTAGE POOL

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Sacramento, CA 95825



BRING A TOWEL,
LAWN CHAIR, OR
BLANKET

*and enjoy a night
of summer fun
with FECRPD!*

Celebrating **70** Years of Parks, People & Community
1956-2026

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FEC HALL & PICNIC, EVENTS & OTHER SPECIAL EVENTS JUNE 2026

Red: Security Needed/Alcohol Permit Blue: FEC Special Event

Friday, June 5, 2026	Natalya Shamrock - Theater	6:00 pm 10:00 pm	JD	Hall	
Sat, June 6, 2026	Natalya Shamrock - Theater	5:00 pm 10:00 pm	Shayla JD	Hall	Alcohol, Private Security 7pm-11pm, Stage lighting
Sun, June 7, 2026	Natalya Shamrock - Theater	4:00 pm 9:00 pm	Austin Ashlee	Hall	Alcohol, Private Security 5pm-9pm, stage lighting
Sun, June 7, 2026	Mario Cervantes – Bday BBQ	2:00 pm 8:00 pm	FECRPD	Chicken Ranch #1	
Sun, June 7, 2026	Caitlin Castle – Birthday Party	10:00 am 4:00 pm	FECRPD	Seely #2 Gazebo	
Fri, June 12, 2026	Gloria Sloan – Grad Party	3:00 pm 9:00 pm	Austin Ashley	Hall	
Sat, June 13, 2026	Alexa Malik – Gard Party	4:00 pm 12:00 am	Shayla Austin	Hall	
Sat, June 13, 2026	Tiana Allen - BBQ	12:30 pm 6:30 pm	FECRPD	Howe #2	
Sat, June 13, 2026	Daniel Edwards – BBQ	10:00 am 4:00 pm	FECRPD	Howe #1	
Thurs, June 18, 2026	El Hogar Community Services	08:00 am 2:30 pm	FECRPD	Hall	Projector
Thurs, June 18, 2026	T.Grady – Graduation Party	3:00 pm 10:00 pm	Shayla Ashlee	Hall	Alcohol, Private Security 6pm – 10pm
Fri, June 19, 2026	Safe Credit Union -Company Event	11:00 am 3:00 pm	Austin Shayla	Hall	
Fri, June 19, 2026	L.Nielsen- VCA Grad Party	5:00 pm 9:00 pm	Austin Ashley	Hall	Alcohol, Private Security 6pm-9pm, projector & Mic
Sat, June 20, 2026	Sima Hafeez – Grad Party	5:00 pm 11:00 pm	Shayla Austin	Hall	
Sat, June 20, 2026	G. Yemane – Picnic	2:00 pm 8:00 pm	FECRPD	Chicken Ranch #1	

FEC HALL & PICNIC, EVENTS & OTHER SPECIAL EVENTS JUNE 2026

Red: Security Needed/Alcohol Permit Blue: FEC Special Event

Sun, June 28, 2026	Powerhouse Church	8:00 am 2:00 pm	FECRPD	Howe Meadow	Amp Music Permit
Sun, June 28, 2026	Angelina Madrid – Picnic	9:00 am 3:00 pm	FECRPD	Howe #2	
Sun, June 28, 2026	Ruben Gomez – Grad Party	2:00 pm 6:00 pm	FECRPD	Howe #1	

I Am Ministries Church Sundays 9:00 am – 12:00 pm

CFFU – 1st Tuesday 4:30 – 9:30 pm

SCMT Sunday 1:00 -7:00 pm, Wednesdays 3:30pm – 7:30 pm

Date of Hearing: April 14, 2026

ASSEMBLY COMMITTEE ON WATER, PARKS, AND WILDLIFE

Diane Papan, Chair

AB 2578 (Rogers) – As Introduced February 20, 2026

SUBJECT: Public recreation access and outdoor economy support organizations

SUMMARY: Permits the California Natural Resources Agency (CNRA) to enter into a statewide agreement with a public recreation access and outdoor economy support organization. Specifically, **this bill:**

- 1) Permits CNRA to enter into a statewide agreement with a support organization to facilitate and implement, among other objectives, the findings and recommendations of the Department of Parks and Recreation’s (State Parks) Outdoors for All initiative, the Governor’s Office of Business and Economic Development’s (GOBiz) Jobs First Report, and California Wildfire and Forest Resilience Task Force’s (Task Force) Joint Strategy for Sustainable Recreation and Wildfire Resilience (Joint Strategy) to develop greater capacity to expand, enhance, and complement projects and programs through the following methods:
 - a) Developing and engaging new sources of public and private funding for the vast network of outdoor businesses and outdoor industry outlets owned, administered, or supported by the agency, including philanthropic sources and enterprise- and revenue-generating activities, where appropriate;
 - b) Supporting marketing and communications activities that promote the programs, amenities, and resources of CNRA, its departments, and its partners;
 - c) Supporting programs, policies, projects, and completion of projects that facilitate increased outdoor recreation, outdoor access, and visitations to visitor-serving amenities and facilities, including, but not limited to, the establishment of new trail corridors that connect people to nature and communities and the establishment of bicycle greenway routes or systems;
 - d) Enhancing outdoor recreation educational opportunities, particularly for younger and more diverse audiences;
 - e) Promoting the health and well-being of the state’s residents;
 - f) Promoting strategic research, data collection, and economic modeling for, among other things, tracking outdoor recreation trends and outdoor participation rates in California;
 - g) Providing communities of interest, including regional outdoor recreation collaboratives, with technical assistance to better inform, educate, and capitalize on intrinsic and economic values of public recreation access; and
 - h) Reinforcing and building upon the definition of “outdoor recreation” as inclusive to activities such as, off-highway vehicle and consumptive activities, including hunting and fishing.

- 2) To complement these efforts, requires CNRA and the support organization to collaborate with GOBiz on a suite of interventions designed to promote the outdoors, including, but not limited to, the implementation of the following:
 - a) Regional industry sector activation plans for the recreation and tourism sector;
 - b) Regional economic development strategies; and
 - c) Regional tourism strategies that do not duplicate efforts underway by Visit California.
- 3) Requires the collaboration in #2, above, to organize and prioritize recommendations rooted in the work of the Task Force's Joint Strategy for Sustainable Outdoor Recreation and Wildfire Resilience.
- 4) Requires the collaboration in #2, above, to establish a single point of contact as a federal lands liaison to communicate and respond to federal policies and practices of impact to federal lands within California and stakeholder interests.
- 5) Requires, the support organization, in consultation with CNRA, to do the following:
 - a) Communicate and coordinate with government entities, partners, friends, and volunteers to ensure that activities undertaken pursuant to the agreement complement, support, facilitate, and amplify ongoing partnerships, programs, and projects in support of increasing access to the outdoors; and
 - b) Engage with public agencies and organizations that manage, operate, and support protected lands in the state.
- 6) Permits the Director of State Parks, the Director of Finance, the Secretary of CNRA, and the Director of GOBiz, or their respective designees, to serve as ex officio, nonvoting members of the support organization's board of directors to provide for effective communication and coordination of efforts between the agency and the support organization.
- 7) Affirms that a public recreation access and outdoor economy support organization is not a state agency or a state body.
- 8) Requires, if CNRA enters into an agreement with a support organization, CNRA and the support organization to collaborate to develop an annual list of strategic initiatives and projects that are statewide priorities for CNRA and for the support organization and that the support organization will undertake in partnership with CNRA.
 - a) Further, requires any initiative or project included on the priority list to be consistent with the purposes specified in subdivision #1 (a–h), above.
 - b) Requires, for the first three years of the agreement, the support organization and CNRA to prioritize a limited subset of focus areas and projects from the list of purposes, consistent with #2, above.
 - c) Requires any initiative or project included on the priority list involving properties operated or managed by State Parks to be consistent with Public Resources Code (PRC)

§ 5001.2 and § 5019.53 regarding protection of the natural, scenic, cultural, and ecological values of the state park system.

- d) Requires CNRA to post a copy of the priority list on its internet website and provide copies of the list to the chairpersons of the Assembly and Senate Budget and relevant Policy Committees.
- 9) Requires the agreement between CRNA and the support organization to include, at a minimum, the following:
 - a) Clear goals and objectives;
 - b) Any commitments of oversight, staffing, and coordination that are needed to accomplish the goals and objectives and
 - c) The process for developing the priority list of strategic initiatives and projects.
- 10) Permits CNRA to develop and enter into supplementary agreements with a support organization for the purpose of securing any expertise, capacity, or financial resources that may be needed to identify, plan, develop, or implement strategic initiatives and projects on the priority list. Allows the supplementary agreement to include grants, contracts, memoranda of understanding, staff-sharing agreements, leases, and rights of entry onto specified public lands.
- 11) Allows the Secretary of CNRA to receive donations of projects, services, and funds from a support organization.
- 12) Allows the Director of Finance 60 days to review and approve or disapprove any agreement, or any substantial amendment to such an agreement. Upon approval of the agreement, the secretary of CNRA may accept donations and enter into supplementary agreements.
- 13) Determines that nothing in this bill shall be interpreted as a limitation on the ability of a support organization to apply for, receive, or administer grants, loans, or other funds from public entities other than the agency and its departments. A support organization shall consult with the agency.
- 14) Makes findings and declarations regarding the health, fitness, mental, and economic value of outdoor recreation and the benefit of establishing a partnership between CNRA and a support organization.

EXISTING LAW:

- 1) Requires the Director of State Parks to promote and regulate the use of the state park system in a manner that conserves the scenery, natural and historic resources, and wildlife in the individual units of the system for the enjoyment of future generations (PRC § 5001.2).
- 2) States that the purpose of state parks shall be to preserve outstanding natural, scenic, and cultural values, indigenous aquatic and terrestrial fauna and flora, and the most significant examples of ecological regions of California. Requires that each state park be managed as a composite whole in order to restore, protect, and maintain its native environmental complexes to the extent compatible with the primary purpose for which the park was

established. Provides that improvements undertaken within state parks shall be for the purpose of making the areas available for public enjoyment and education in a manner consistent with the preservation of natural, scenic, cultural, and ecological values for present and future generations (PRC § 5019.53).

- 3) Grants State Parks the authority to enter into a statewide agreement with a “park support organization” to facilitate the implementation of reforms recommended by the Parks Forward Commission and to develop and secure expertise, services, resources, and projects that are not readily available to the state park system for specific purposes (PRC §§ 520 *et seq.*). And, among other things:
 - a) Permits the Director of State Parks and Director of Finance, or their designees, to serve as a nonvoting members of the park support organization’s board of directors.
 - b) Affirms that the park support organization is not a state agency or state body.
 - c) Requires State Parks and the park support organization to develop an annual list of strategic initiatives and projects that are statewide priorities for the state park system, referred to as the priority list.
 - d) Requires the agreement to include, at a minimum: clear goals and objectives; commitments of oversight, staffing, and coordination needed to accomplish the goals and objectives; and the process for developing the priority list.
 - e) Permits State Parks to develop supplementary agreements with the park support organization.
 - f) Allows the Director of State Parks to receive donations of projects, services, and funds from the park support organization.

FISCAL EFFECT: Unknown. This bill is keyed fiscal.

COMMENTS:

- 1) **Purpose of this bill.** According to the author, “[This bill] aims to establish an office of outdoor recreation for the state of California, which would support state investments into equitable access, recreation infrastructure, outdoor jobs, and to help sustain and grow California’s outdoor economy. California has an abundance of beautiful natural resources, the highest outdoor recreation [gross domestic product] in the U.S., and the most national parks per state, but is neck-and-neck in visitations with Utah, which was the first state to create an Office of Outdoor Recreation in 2013. [This bill] promotes the strengthening and accessible access of California’s outdoor resources, allowing the population to benefit further from the mental, physical, and economic benefits associated with the outdoors.”
- 2) **Background.** According to the Task Force’s Joint Strategy, outdoor recreation connects people with nature while improving their overall health and quality of life. Following years of steady increases in the number of outdoor recreationists, COVID-19 pandemic shutdowns resulted in a surge of outdoor recreational use of public lands and waters. The increased demand for outdoor recreation benefits local economies that depend on recreation for jobs, economic output, sense of place, and quality of life. However, the increased number of

outdoor recreationists necessitates more resources for user support, natural resource management, and wildfire risk reduction. The Joint Strategy estimates that nearly half of the land in California is open for recreation (47 million acres), with most of the land managed by federal agencies (43.7 million acres) and about 2 million acres is managed by state agencies.

In March 2026, the Bureau of Economic Analysis released statistics measuring the outdoor recreation economy in 2024. Data show that the outdoor recreation economy accounts for 2.4% of the nation's gross domestic product (\$696.7 billion). California ranked first in the nation for outdoor recreation value added (\$87.9 billion), outdoor recreation jobs (589,354 jobs), and compensation (\$42.0 billion). Activities that generate the most value added in the state are boating/fishing, RVing, and motorcycling/ATVing, according to the 2024 analysis.

Rankings for California:

Value Added by Select Outdoor Recreation Activity [Thousands of dollars]				
Activity	2022	2023	2024	State rank 2024
Boating / fishing	3,054,937	3,272,910	3,317,988	2
RVing	2,542,612	2,202,461	2,094,731	3
Motorcycling / ATVing	1,284,820	1,433,792	1,452,772	1
Climbing / hiking / tent camping	849,086	877,654	937,935	1
Bicycling	633,114	822,989	927,619	1
Hunting / shooting / trapping	647,931	705,221	817,496	3
Snow activities	660,539	749,777	730,464	2
Equestrian	473,560	511,963	508,747	2
Recreational flying	223,756	231,786	227,832	2

Outdoors for All. The California Outdoors for All initiative is focused on equitably expanding outdoor access to all Californians through focused investments in open space infrastructure, outdoor programming, and improvements to state systems. These efforts seek to undo deeply ingrained inequities and preserve the cherished natural, cultural, and tribal resources as the fight against climate change intensifies. Additionally, the Outdoors for All initiative advances two other state priorities, Nature-Based Solutions and 30x30, by investing in California's public lands and natural resources. The Outdoors for All strategy was released in November 2023 and includes six priorities: establish spaces for people and nature to thrive, foster belonging, connect people and the outdoors, co-create with communities, build equitable career pathways and a representative workforce, and align funding to achieve Outdoors for All.

GOBiz State Economic Blueprint. Released in early 2025, the California Jobs First Economic Blueprint lays out a statewide economic vision anchored in ten strategic industry sectors and informed by 13 region-specific plans. Under the Blueprint, each sector was categorized based on the state's evaluation of the support the sector would need. The Blueprint categorizes the "tourism and outdoor recreation" sector under the "strengthen" category, indicating that California has an established competitive position and/or significant employment, but is experiencing leveling growth or wages. "Tourism and outdoor recreation" is identified as a regional strategic sector in nine of the 13 regions, though goals for and management of the sector differ by region. For example, the Bay Area region indicates that "The broad arts, entertainment, and recreation sector is projected to grow significantly," while the Sierra region report notes that there is a need to adapt outdoor activities based on conditions such as

snow or smoke conditions and raises the concern that over-reliance on outdoor recreation creates economic vulnerability, especially during seasonal fluctuations.

California's Joint Strategy for Sustainable Outdoor Recreation & Wildfire Resilience. The Joint Strategy “attempts to elevate California Native governments, communities, peoples, and priorities into the collective thinking about sustainable outdoor recreation, inclusive access to the outdoors, and wildfire resilience.” The stated goals of the Joint Strategy are to:

- Integrate the provision of high-quality, sustainable outdoor recreation opportunities with forest health and resilience and wildfire and climate mitigation efforts so that all people can connect to the benefits and wonders of the natural world;
- Plan for and provide a diversity of outdoor recreation opportunities to foster inclusive and equitable access for all Californians;
- Provide health information, training, and alternative recreation opportunities that promote the health and well-being of all peoples, with consideration of people's needs before, during, and after wildfires and other natural disasters; and
- Foster and support robust and diversified economies that enhance sustainable outdoor recreation while investing in the resilience necessary to withstand the impact of climate change, wildfires, and other disasters.

Each goal is accompanied by numerous key actions such as designing and building outdoor recreation infrastructure that is resilient to climate change and wildfire; exploring the creation of an online outdoor recreation opportunities resource for visitors to research local, regional, and state recreation opportunities based on interest and location; conducting a multi-agency social science survey to gauge the current needs of outdoor recreation users; and building sustainable outdoor-recreation-based economies.

Offices of Outdoor Recreation. According to the Outdoor Recreation Roundtable, a business coalition to advance outdoor recreation, 24 states have an office or division of outdoor recreation, which serves as a central champion for the outdoor recreation economy and its associated benefits. Nearly all of those states have joined the Confluence of States, a bipartisan organization with the goals of growing the outdoor recreation industry, conservation and stewardship, education and workforce training, public health and wellness, and promoting safety and inclusion. The Confluence of States provides education and resources for these offices and states interested in standing up their own office, including a guidebook to develop offices of outdoor recreation.

Parks California. This bill is modeled off of the statutory language that established Parks California. According to the Parks California website, “Parks California is a nonprofit organization and California State Parks’ official statutory partner that is dedicated to expanding programs, amenities, and resources so that all people have the opportunity to build lifelong, meaningful connections with nature.” The formation of Parks California was a response to a 2015 report by the Parks Forward Commission, which indicated that there were economic and social barriers for many people to experience California’s state parks and that there was a need to provide new resources and education opportunities for the state’s diverse population. SB 1111 (Pavley, Chapter 540, Statutes of 2016), authorized State Parks to enter into “a statewide agreement with a park support organization to facilitate the implementation

of reforms recommended by the Parks Forward Commission and to develop and secure expertise, services, resources, and projects that are not readily available to the state park system.”

- 3) **Proposed committee amendments.** To provide better clarity and organization, the Committee may wish for the author to take the following amendments:

Proposed PRC § 526

For purposes of this article, the following terms have the following meanings:

(a) “Agency” means the Natural Resources Agency.

(b) “Outdoor access” means the ability, right, or opportunity for *all* people to *safely and equitably* enter and use outdoor recreation spaces, ranging from public parks to private land, for outdoor recreational activities ~~such as hiking, biking, camping, backpacking, skiing, snowboarding, rock climbing, mountaineering, kayaking, hunting, fishing, and off-roading.~~

~~(c) “Outdoor business” means a commercial enterprise focused on products, services, or experiences that take place in natural or outdoor environments.~~

(d) “Outdoor economy” means the gross output, compensation, employment, and value-added gross domestic product (GDP) generated by activities that occur outdoors, including conventional core activities, including fishing, hiking, and hunting, other activities, including gardening, and supporting activities, including tourism.

~~(e) “Outdoor industry” means commercial enterprises, manufacturers, retailers, service providers, and nonprofit organizations that facilitate, promote, or equip activities centered on nature-based adventure through human-powered recreation or motorized activities with an appreciation for conservation. Outdoor industry encompasses gear design, tourism, hospitality, and guided experiences, including fishing and hunting, and contributes significantly to the economy, including a record \$1.2 trillion in total national output and \$81.5 billion in California in 2023.~~

(f) “Outdoor recreation” means all recreational activities *responsibly* undertaken for pleasure that occur outdoors, including human-powered and motorized activities if the activity takes place in a natural environment *with a respect for conservation, wildlife, habitat, and off-limit areas. Outdoor recreation includes such as hiking, biking, surfing, camping, backpacking, skiing, snowboarding, rock climbing, mountaineering, kayaking, hunting, fishing, off-roading, and adaptive outdoor sports with responsible recreation principles and conservation at the forefront.*

(g) “Priority list” means the annual list of strategic initiatives and projects developed by the agency and the support organization pursuant to Section 527.2.

(h) ~~“Public recreation access and outdoor economy support~~ **Support** organization” means a nonprofit organization that meets the following requirements:

(1) Is exempt from taxation pursuant to Section 501(c)(3) of the Internal Revenue Code.

(2) Is established for the principal purposes of increasing outdoor access and promoting expanded recreation opportunities on, and within, California’s diverse landscapes to support mental, physical, and economic health objectives in the state.

(3) Complies with the Supervision of Trustees and Fundraisers for Charitable Purposes Act (Article 7 (commencing with Section 12580) of Chapter 6 of Part 2 of Division 3 of Title 2 of the Government Code).

(i) ~~“Support organization” means a public recreation access and outdoor economy support organization.~~

Proposed PRC § 527

(a) The agency may enter into a statewide agreement with a support organization to facilitate and implement, among other objectives, the findings and recommendations of the department’s Outdoors for All initiative, the Governor’s Office of Business and Economic Development’s Jobs First report, ~~and~~ California’s Wildfire and Forest Resilience Task Force’s Joint Strategy for Sustainable Recreation and Wildfire Resilience, ***and efforts through the California Department of Fish and Wildlife Hunting and Fishing Recruitment, Retention and Reactivation (R3) Initiative*** to develop greater capacity to expand, enhance, and complement projects and programs proposed by the agency through the following methods:

(1) Developing and ***strengthening the outdoor economy to better support the workforce, mitigate seasonal fluctuations, attract new opportunities and experiences, and generate funds to support the sustainable operation of outdoor recreation amenities and activities.*** ~~engaging new sources of public and private funding for the vast network of outdoor businesses and outdoor industry outlets owned, administered, or supported by the agency, including philanthropic sources and enterprise and revenue generating activities, where appropriate.~~

(2) Supporting marketing and communications activities that promote the programs, amenities, and resources of the agency, its departments, and its partners.

(3) Supporting programs, policies, ~~projects, and completion of projects~~ ***and projects*** that facilitate increased ***responsible*** outdoor recreation, outdoor access, and ~~visitations~~ ***visitation*** to visitor-serving amenities and facilities, including, but not limited to, the establishment of new trail corridors that connect people to nature and ~~communities and communities~~, the establishment of bicycle greenway routes or systems, ***and the maintenance, operation, stewardship, and mitigation of new and existing amenities and facilities.***

(4) Supporting and providing recommendations to a designated State Director, should the state join the Confluence of States.

(4) Enhancing outdoor recreation ***and conservation*** educational opportunities, particularly for younger and more diverse audiences.

(5) Promoting the health and well-being of the state’s residents.

(6) Promoting ***or develop*** strategic research, data collection, and economic modeling for, among other things, tracking outdoor recreation trends and outdoor participation rates in California.

(7) Providing ~~communities of interest, including regional outdoor recreation collaboratives,~~ ***with*** technical assistance to better inform, educate, and capitalize on intrinsic and economic values of public recreation access.

(8) Reinforcing and building upon the ***inclusivity of the*** definition of “outdoor recreation” ~~as all inclusive to include, among other activities, off highway vehicle and consumptive~~

activities, including hunting and fishing. *with respect for trail boundaries and off-limit areas for wildlife, habitat, and conservation.*

(9) Prioritizing a coexistence between outdoor recreationists, wildlife, biodiversity, and habitat with a purpose to protect and preserve wildlife habitats and inspire conservationists for generations to come.

(10) Initiating collaboration with existing tribal entities and maintaining respect for their wishes for the land and waters on which we recreate.

(b) (1) To complement these efforts, the agency and support organization shall collaborate with the Governor's Office of Business and Economic Development on a suite of interventions designed to promote the outdoors, including, but not limited to, the implementation of the following:

(A) Regional industry sector activation plans for the recreation and tourism sector.

(B) Regional economic development strategies.

(C) Regional tourism strategies that **support, but** do not duplicate, efforts underway by Visit California.

(2) The collaboration pursuant to paragraph (1) shall organize and prioritize recommendations rooted in the work of the California Wildfire and Forest Resilience Task Force's Joint Strategy for Sustainable Outdoor Recreation and Wildfire Resilience.

(3) The collaboration pursuant to paragraph (1) shall establish a single point of contact as a federal lands liaison to communicate and respond to federal policies and practices of impact to federal lands within California and stakeholder interests.

(c) If the agency enters into an agreement with a support organization, the support organization, in consultation with the agency, shall do the following:

(1) Communicate and coordinate with government entities, partners, friends, and volunteers to ensure that activities undertaken pursuant to the agreement complement, support, facilitate, and amplify ongoing partnerships, programs, and projects in support of increasing access to the outdoors.

(2) Engage with public agencies and organizations that manage, operate, and support protected lands in the state.

Proposed PRC § 527.1

(a) The director, the Director of Finance, the Secretary of the Natural Resources Agency, and the Director of the Governor's Office of Business and Economic Development, or their respective designees **or proxy**, may serve as ex officio, nonvoting members of the support organization's board of directors to provide for effective communication and coordination of efforts between the agency and the support organization. ***The Secretary of the Natural Resources Agency may designate additional ex officio members, as appropriate, from departments within the California Natural Resources Agency.***

~~(b) A public recreation access and outdoor economy support~~ **A support** organization is not a state agency or a state body.

- 4) **Arguments in support.** Given the mental, physical, and economic health benefits associated with being outdoors, a coalition of outdoor and recreation focused entities write that this bill fills a gap that Parks California fills only for state parks, and it does so with both the

Outdoors for All equity mission and the Jobs First economic development mission explicitly named as its core directive. Although this bill is focused primarily on outdoor recreation, they believe this bill will increase funding for greenways, new visitor amenities, a future statewide interpreter program, and current backlog maintenance of trails, which will inspire conservationists for generations to come. They also note that the support organization established under this bill will support coordination across federal, state, and local jurisdictions, rather than just within state parks, which is “essential to our coherent outdoor recreation and economic development strategy.”

- 5) **Related legislation.** AB 2285 (Rendon) of 2024 would have required the recognition of the coequal goals and benefits of 30x30 and Outdoors for All, when distributing resources. AB 2285 was held in the Senate Appropriations Committee.

AB 30 (Klara), Chapter 939, Statutes of 2022, declared that it was the policy of the state to ensure that all Californians have equitable opportunities to safe and affordable access to nature and access to the benefits of nature and to maximize public access to public lands in a sustainable manner.

AB 1918 (Garcia) of 2018 would have established the Office of Sustainable Outdoor Recreation in CNRA and required the office to undertake certain activities, including supporting the outdoor recreation economy of the state by engaging in specified activities. AB 1918 was vetoed by Governor Brown. The veto message read:

The activities identified in this bill are important, but a new bureaucracy is not needed to accomplish the goal. Over the last few years [State Parks] has worked towards enhancing recreational opportunities throughout the state. In fact, Parks California, a support organization to [State Parks] was recently created to promote outdoor recreation and is engaging in activities similar to those called for in this bill.

SB 1111 (Pavley), Chapter 540, Statutes of 2016), authorizes State Parks to enter into a statewide agreement with a park support organization, to facilitate the implementation of reforms recommended by the Parks Forward Commission and to develop and secure expertise, services, resources, and projects that are not readily available to the state park system for specified purposes.

REGISTERED SUPPORT / OPPOSITION:

Support

California Outdoor Recreation Partnership (sponsor)
 Access Fund
 Altra
 Bewilder
 California Mountain Biking Coalition
 California Park & Recreation Society
 California Trails Foundation
 California Waterfowl
 Catalina Island Conservancy
 City of Eureka
 Cliffhanger Guides

Concerned Off-road Bicyclists Association
 Eastern Sierra Conservation Corps
 Environmental Protection Information Center
 Explore Local Nature
 Founded Outdoors
 Friends of Harbors, Beaches and Parks
 Friends of Joshua Tree
 Great Redwood Trail Agency
 Hipcamp, INC.
 Hydrapak
 Inclusion Outdoors
 League of California Cities
 Mammoth Lakes Recreation
 Mammoth Lakes Trails and Public Access Foundation
 Outdoor Afro
 Outdoor Alliance
 Outdoor Outreach
 Peak Design
 Placer Land Trust
 Protect American River Canyons
 REI Co-op
 Resource Renewal Institute
 Sacramento Valley Conservancy
 Save Mount Diablo
 Seirus Innovation
 Sierra Business Council
 Sierra Nevada Alliance
 Siskiyou Outdoor Recreation Alliance
 Smartwool
 Sonoma County Regional Parks
 Surfrider Foundation
 Synergy Reps
 Ten Strands
 The North Face
 The Summertree Institute
 Timberland
 Toad & Co.
 TOPO Collective
 Town of Mammoth Lakes
 Trinity County Community Development Corporation
 VF Corporation
 Watershed Center
 Winter Wildlands Alliance

Opposition

None on file

Analysis Prepared by: Stephanie Mitchell / W., P., & W. / (916) 319-2096



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Significant Legislative Highlights

Bill Report

2026 Mid-Year Legislative Report



Photo Credit: Stephen Leonardi

Disclaimer: This publication is provided for general information and is not offered or intended as legal advice. Readers should seek the advice of an attorney when confronted with legal issues and attorneys should perform an independent evaluation of the issues raised in these materials.



2026 Mid-Year Legislative Report

Photo Credit: Nick Verlice

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2026 MID-YEAR LEGISLATIVE REPORT: *The Voice of Special Districts*

In the second year of the 2025-2026 Legislative Session, the California State Legislature introduced and CSDA reviewed 2,178 measures. CSDA's Legislative Committee adopted positions on 1,475 bills and other measures, including 235 priority positions, such as sponsor/co-sponsor, support, support if amended, oppose, oppose unless amended, concerns, and neutral positions following amendments. CSDA's 2026 advocacy priorities are steadfast:

- **Protecting Local Revenue**
- **Supporting Infrastructure Essential to Affordable Housing**
- **Ensuring Equitable Access to Funding**

The California State Legislature's Summer Recess, beginning upon adjournment on July 2, 2026, marks the deadline for each house to pass bills out of their respective policy committees. The Legislature will return on August 3, 2026, and session will end August 31, 2026. Governor Gavin Newsom will then have one month to sign or veto any bills that reach his desk.

Especially important measures on which CSDA has engaged on behalf of our more than 1,000 special district members include:

California High-Speed Rail Authority 2026 Business Plan: Tax increment financing district proposal –

- CSDA, along with other local government association stakeholders, expressed opposition to the California High-Speed Rail Authority's 2026 Business Plan. Specifically, CSDA and stakeholders opposed the Authority's pursuit of legislative action that would grant the Authority the ability to create tax increment financing districts without the consent of the affected taxing entities (e.g., special districts and other local governments). CSDA conveyed opposition to any such proposal that would have diverted growth in property tax revenue to the project without the express, meaningful, and freely-given consent of the affected taxing entities. At this time, the proposal has not been incorporated into legislation.

SB 992 [Niello] County auditors: special districts: annual audit exceptions –

- CSDA has sponsored this legislation in partnership with the California State Association of County Auditors to provide relief to special districts with smaller annual budgets. The bill would extend a sunset associated with alternatives to an annual audit requirement; qualifying special districts with not more than \$250,000 in annual revenue would be permitted to use agreed-upon procedures agreements until January 1, 2037. The \$250,000 limit is an increase over the prior \$150,000 limit. Special districts with annual revenues not more than \$50,000 that had been relying on annual financial compilations for five consecutive years to fulfill their annual audit obligation would also now be



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permitted to continue using financial reviews or agreed-upon procedures engagements, rather than having to pivot to a traditional audit.

ACR 161 [Addis] Special Districts Week –

- CSDA sponsored this resolution to continue to spotlight the value of the essential local services provided by special districts.
 - The resolution proclaimed the week of April 5, 2026, to April 11, 2026, to be Special Districts Week.
 - This resolution builds on resolutions from previous years, in which the Legislature had similarly encouraged all Californians to be involved in their communities and be civically engaged with their local government.

Local Revenue:

CSDA has worked to protect special district revenues, supporting legislation that promotes fiscal stability and safeguards public agencies from costly litigation, while opposing legislation which would reduce needed funding and local control.

- **AB 122 [Assembly Budget Committee] Taxation and SB 122 [Senate Budget and Fiscal Review Committee] Taxation** - CSDA opposed these budget trailer bills, unless amended, based on their inclusion of a provision that would require the payment of sales and use taxes in connection with the purchase of digital prewritten software. Special districts will be required to pay these sales and use taxes when purchasing software for their agencies. Unlike cities and counties, special districts do not generally receive sales and use tax revenue, so special districts are uniquely harmed among local governments by being obligated to pay these taxes. While the bills contain exemptions for certain types of software and for certain purchasers of software, these exemptions do not broadly or always apply to special districts.
- **AB 2180 [Ward] Local government: Proposition 218 Omnibus Implementation Act: proportional cost of service** - Allows local agencies, for the purpose of calculating property-related fees and charges to comply with Proposition 218, to demonstrate the proportional cost of service to the parcel with any method that reasonably allocates the cost of providing service to all parcels. Local agencies must substantiate the allocation with historic, existing, estimated, or projected data that reasonably captures the cost of the service provided. CSDA is supporting the measure.
- **AB 2214 [Jackson] Government finance: deposits** - Would create the Community Reinvestment Account within the Local Agency Investment Fund. The account would provide loans for small businesses and first-time homebuyers. Funding for this account would come from the Pooled Money Investment Account – the bill directs the California State Treasurer to transfer \$4 billion from the Pooled Money Investment Account to the Community Reinvestment Account.



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- **Key Legislative Success: failed to advance in the Assembly.**
- **[SB 922 \[Laird\] Vehicles: local agency charges: use of streets or highways](#)** - This bill clarifies that local governments may recover the cost of street maintenance and repair caused by public service operations, such as waste hauling, through service-related fees and charges. CSDA is supporting this measure.
- **[AB 2640 \[Hadwick\] Commission on State Mandates: state mandates](#)** - Allows school districts and local agencies to offset any decreases to a pending mandate reimbursement claim from any unpaid reimbursement claims attributed to that local agency or school district, whether appropriated or not, to the extent that sufficient unpaid reimbursement claims exist. This would only apply to claim adjustments that occur after January 1, 2027. CSDA is supporting this measure.

Housing, Permitting and Development Related Fees:

CSDA continued to fight the proliferation of legislative measures restricting local agencies' ability to fund and build infrastructure essential to new housing. CSDA is actively working to educate legislators and their staff on the importance of the role that special districts play in meeting the needs of growing affordable, equitable communities and the effect of state laws on local resources and operations, including development impact fees, the Quimby Act, post-entitlement permitting, and connection and capacity charges. Bills of particular interest to CSDA members include:

- **Governor's Trailer Bill Proposal to eliminate certain Development Related Fees (DRF): [RN2614486 v3](#)** - Eliminates a range of DRFs, charges and other revenue vehicles for certain affordable housing projects that are subsidized by the state. While the proponents stated that it is only directed at cities and counties, CSDA offered amendments to clarify that the proposal will not apply to special districts' fees.
 - **Key Legislative Success: CSDA's concerns were resolved in the as-introduced version of this proposal ([AB 179 \[Committee on Budget\] Housing](#)).**
- **[AB 748 \[Harabedian\] Single-family and multifamily housing units: preapproved plans](#)** - Among other things, this measure would require a city or county to post preapproved single-family or multifamily residential housing plans on the agency's website and approve such applications ministerially within 30 days. CSDA and its partners have requested amendments to include an admonition on the same website as the pre-approved plans to contact other service providers that will be providing services to those developments, such as special districts.



- **AB 1710 [Carrillo] Housing developments: ordinances, policies, and standards** - Among other things, this measure would extend the “vesting” rights that apply to certain local agency reviews of housing developments to include materials requirements and post entitlement permit standards. Additionally, it would also extend the “reasonable person” standard to public agency determinations of whether a housing development project is consistent, compliant, and in conformity with applicable plans, policies, and ordinances for purposes of the Permit Streamlining Act (PSA). CSDA and its partners have requested amendments to mitigate potential conflicts with federal, state and regional requirements.
- **AB 1751 [Quirk-Silva] Missing Middle Townhome Ownership Act** - Among other things, this bill authorizes a development proponent to submit an application for a townhome housing development project that is subject to a prescribed ministerial approval process if the development complies with certain procedural requirements and satisfies specified objective planning standards. The bill would also require a local agency to ministerially consider, without discretionary review or a hearing, a parcel map or a tentative and final map for a townhome development project that meets all specified requirements, with some limited exceptions.
- **AB 1997 [Lee] Land use: housing development approvals: timelines and processes** - This bill requires approval or disapproval of a housing development project within 30 days from the date of certification by the lead agency of the Environmental Impact Report (EIR), if the EIR is prepared pursuant to specific provisions of CEQA, if certain other conditions are met regarding income and affordability. Earlier versions required a city or county with a population of 250,000 or more to assign a project development director to a project that was expected to cost more than \$10,000,000 and assign a lead inspector to coordinate each inspection required of the housing project. This provision was successfully removed. Additionally, prior versions of this measure also prohibited a plan, entitlement, or permit that had been approved by a previous local utility or agency from being overturned or revised by a subsequent utility or agency, unless the development proponent made a material change to the project. This provision was also successfully removed.
 - **Key Legislative Success: major concerns resolved.**
- **SB 1014 [Grayson] Development projects: preliminary estimate of required improvements: onsite and offsite improvements** - Among other things, an applicant for a housing development may request a list of the types of an any onsite or offsite improvements that may be required in connection with the housing development project, and the public agency or utility shall provide the applicant with this information within 30 business days. All of these requests shall be for informational purposes only and shall



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not be legally binding. CSDA and its partners worked successfully to amend the measure from more onerous requirements.

- **Key Legislative Success: major concerns resolved.**
- **[SB 1085 \[Durazo\] Water supply planning: housing developments](#)** - This bill would require a city or county to identify public water systems that may supply water for certain housing development projects and to request those public water systems to prepare a specified water supply assessment for certain projects that the city or county approves, without regard to whether the project is determined to be subject to the requirements of the California Environmental Quality Act (CEQA).
- **[SB 1117 \[Cervantes\] Accessory dwelling units and junior accessory dwelling units](#)** - Existing law prohibits a local agency, special district, or water corporation from imposing any impact fee upon the development of an Accessory Dwelling Unit (ADU) that has 750 square feet of interior livable space or less, and requires any impact fees charged for an ADU that has more than 750 square feet of interior livable space to be charged proportionately in relation to the square footage of the primary dwelling unit. This bill would further narrow the impact fee on an ADU to be based only on the area in excess of 750 square feet of interior livable space. CSDA is opposing this measure due to its impact on providing affordable and equitable services to new housing units.
- **[SB 1196 \[McNerney\] Accessory dwelling units and junior accessory dwelling units: electrical](#)** - Prior versions of this measure would have required specified timelines by which utilities must respond to requests to connect service for accessory dwelling units (ADUs) and junior ADUs (JADU). Additionally, prior versions of this measure required each of the “utilities” to post on their internet website a comprehensive checklist of items that an applicant is required to submit to the utility for an application for obtaining a service connection to an ADU or JADU to be deemed complete, to provide an option for the applicant to engage with staff for preapplication project review, and to provide upfront estimated costs for the applicant’s planning purposes. This measure was amended to exclude publicly owned utilities.



Surplus Land Act

- **AB 2094 [Harabedian] Social Housing Strategy and Implementation Program** - This measure at one time created the surplus land housing pilot program. After favorable amendments following concerns shared by CSDA, this bill then established the Social Housing Strategy and Implementation Program and required the Department of Housing and Community Development (HCD) to establish a dedicated social housing coordinator to lead social housing strategy and implementation, before it died in fiscal committee.
 - **Key Legislative Success: held in Appropriations Committee after major concerns resolved.**
- **AB 2139 [Garcia] Surplus lands: exempt surplus land: City of Ontario** - This measure exempts the Ontario Sports Empire in the City of Ontario (City) from the Surplus Land Act (SLA), subject to specified conditions. The measure includes provisions that are inconsistent with the definition of disposal of surplus land in the SLA, and undermine that important definition. CSDA requested amendments to align to the existing definition prior to the bill failing to advance out of policy committee.
 - **Key Legislative Success: failed to advance in the Senate.**

Governance

CSDA remains actively engaged in issues affecting special district governance; these issues include the Ralph M. Brown Act, the California Public Records Act, artificial intelligence/automated decision-making systems, and more. Bills that CSDA has actively engaged on in this area include the following:

- **SB 1187 [Durazo] Open meetings** - This bill is a follow-up to last year's SB 707, the Brown Act overhaul from the same author. SB 1187 would remove the translation-related provisions added to the Brown Act by SB 707, relieving special districts who qualified as "eligible legislative bodies" from those obligations.
 - Following passage out of the Assembly Local Government Committee, SB 1187 had an urgency clause added to the bill, which will make its changes to the Brown Act effective immediately upon being signed into law.
- **AB 1337 [Ward] Information Practices Act of 1977** - CSDA joined other local government stakeholders with an oppose unless amended position on this bill that would apply the Information Practices Act of 1977, the general data privacy statute that applies to the state, to local agencies, including special districts. Despite having died in committee last year, the bill was revived and scheduled for new policy hearings. The bill would have imposed the Act's numerous data retention, data handling, and data collection requirements on local agencies, despite the extant, similar requirements that already apply.
 - **Key Legislative Success: failed to advance in the Senate.**



- **[SB 1312 \[Richardson\] Cemeteries](#)** - This bill is the follow-up to SB 777 from the same author last year. SB 777 tasked the Cemetery and Funeral Bureau with producing a report by June 1, 2026 containing recommendations related to the continued care, maintenance, and embellishment of abandoned cemeteries, including the possibility of requiring counties to assume responsibility for maintenance, irrigation, public works, and burial services for cemeteries located within their boundaries that become abandoned. SB 1312 implements those recommendations; CSDA opposes SB 1312, unless amended, on the grounds that it establishes a pathway to unilaterally task public cemetery districts with the care, maintenance, and embellishment of abandoned cemeteries.
- **[SB 1115 \[Grove\] Public cemetery districts: board of trustees: County of Tulare](#)** - This bill seeks to empower the Tulare County Board of Supervisors with the unprecedented ability to remove individual public cemetery district trustees in Tulare County. In permitting the Tulare County Board of Supervisors to remove individual trustees, the bill could eliminate the distinction between independent and dependent special districts, effectively making trustees' service terms at the pleasure of their appointing authority rather than fixed, four-year periods.
 - This bill also creates a process for the public cemetery district to initiate a process to remove an individual trustee; CSDA's opposition to this bill, unless amended, is focused on the provisions allowing the Tulare County Board of Supervisors to initiate the removal process.
- **[AB 1821 \[Pacheco\] California Public Records Act: agency response time](#)** - This bill, supported by CSDA, changes the 10-day timeframe that governments have to provide their initial response to a California Public Records Act request to 10 business days.
 - Similarly, the bill would extend the 14-day period applicable in unusual circumstances to 14 business days.
- **[SB 1159 \[Cabaldon\] Artificial intelligence: transparency and governance](#)** - This bill, supported by CSDA, would provide that for the purposes of specified governance and transparency acts – the Administrative Procedures Act, the California Public Records Act, the Legislative Open Records Act, the Bagley-Keene Open Meeting Act, the Ralph M. Brown Act, the California Environmental Quality Act, and the California Coastal Act – the terms “person,” “interested person,” “participant,” “member of the public,” as applicable, and any other similar terms under each act referring to those who may engage with governmental agencies, do not include artificial intelligence (AI) systems, autonomous agents, robots, or other nonhuman entities, whether physical or digital.
- **[SB 430 \[Cabaldon\] Local agencies: automated decision systems](#)** - This bill would have regulated the use of automated decision systems (ADS) in determining applicant (in)eligibility for public benefit programs and its use in administering services by local governments, including special districts. The bill included very broad definitions of what



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would be considered an "automated decision system" and what would be considered "supportive services."

- **Key Legislative Success: failed to advance in the Senate.**

Emergency Planning and Response:

- **[SB 1263 \[McGuire\] Contractors: debris removal](#)** - This bill prohibits a contractor from engaging in private debris removal without specific licenses and certifications during a declared emergency or disaster.
 - **Key Legislative Success: CSDA successfully requested expanding the types of contractors that can perform certain work such as tree removal while supporting the efforts of our partners to narrow the boundaries of disaster areas, emergencies and narrowing the scope of the property types involved.**

Workplace Technology:

Concerns about the use of surveillance and artificial intelligence in the workplace have given rise to numerous bills this year seeking to restrict and regulate the use of those technologies. CSDA and its coalition partners have been leaders in making sure the public employer perspective is recognized by the Legislature as these measures have advanced. The bills on which CSDA has been most engaged are:

- **[AB 2656 \[Petrie-Norris\] Public employees: notice: artificial intelligence performing service within scope of work](#)** - This bill requires a public employer to provide a 45-day written notice to a recognized employee organization prior to development, purchasing, implementing, or utilizing any generative Artificial Intelligence (AI) to perform a service within the same scope of work as the recognized employee organization. CSDA is opposing this measure.
- **[SB 947 \[McNerney\] Employment: automated decisions systems](#)** - The bill contains a list of prohibited uses of Automated Decision Systems (ADS), as specified. The bill prohibits an employer from relying solely on an ADS when making a disciplinary, termination, or deactivation decision. The bill places a human review requirement, as specified, to primarily rely on an ADS in making a disciplinary, termination, or deactivation decision, as well as an employee right to access data, post-use notice, and other provisions. CSDA is leading the local government and education coalition opposed to the measure.
- **[SB 951 \[Reyes\] Employment: technological displacement: notice](#)** - This bill requires notifications prior to technological displacement of 50 or more workers or technological cessation in hiring. For employers with over 100 workers, the bill requires a "right of first



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bid” on other positions with the employer for displaced workers. CSDA is part of a public employer coalition with an oppose unless amended position.

- **[AB 1883 \[Bryan\] Workplace surveillance tools](#)** - This bill places restrictions on employer uses of workplace surveillance tools. CSDA is part of a public employer coalition opposed to the measure.
- **[SB 238 \[Smallwood-Cuevas\] Workplace surveillance tools](#)** - This bill would have required reporting of workplace surveillance tools to the Department of Industrial Relations, as specified. CSDA led the local government and education coalition opposed to the measure.
 - **Key Legislative Success: did not advance in the Assembly following removal of public employers from the bill.**
- **[AB 1898 \[Schultz\] Workplace artificial intelligence tools](#)** - This bill would have required pre-use notices for ADS or workplace surveillance tools that use AI. CSDA was opposed to the measure.
 - **Key Legislative Success: held in Assembly Appropriations Committee following CSDA members’ advocacy at Special Districts Legislative Days.**
- **[AB 2027 \[Ward\] Worker data: prohibitions: artificial intelligence](#)** - This bill would have significantly limited employers’ ability to use AI in the workplace by prohibiting the use of a worker’s personal information to train an artificial intelligence system to replicate, automate, or replace a worker’s job. This bill also contained other data restrictions, as specified. CSDA was opposed to the measure.
 - **Key Legislative Success: held in Assembly Appropriations Committee following CSDA members’ advocacy at Special Districts Legislative Days.**

Employment:

CSDA continued its advocacy on other labor and employment legislation which may have adverse impacts on special districts’ ability to provide essential services or maintain safe workplaces. The bills on which CSDA has been most engaged include:

- **[AB 1564 \[Ahrens\] Employer-employee relations: confidential communications](#)** - Would prohibit public employer questioning of employee – union representative communications, or compelling disclosure to a third party. The bill does not apply to criminal investigations and does not supersede specified law pertaining to investigations of police officers. CSDA is leading the local government and education coalition opposed to the measure.



- [**AB 2064 \[Sharp-Collins\] Discrimination: formerly incarcerated status**](#) - Would have added criminal history to the list of protected characteristics under the California Fair Employment and Housing Act. CSDA led the local government and education opposed to the measure due to its potential impacts on employment background checks.
 - **Key Legislative Success: held in Assembly Appropriations Committee.**
- [**AB 2095 \[Lee\] Employment discrimination: conviction history**](#) - Would have placed restrictions on the ability of employers to conduct criminal history background checks. This bill failed to advance out of its house of origin.
- [**AB 2530 \[Caloza\] Employment: Cal/WARN Act: plant closings and mass layoffs**](#) - Would have extended the Cal/WARN Act to public employers, requiring mass layoff notices under certain circumstances. CSDA and its coalition partners opposed the inappropriate extension of this private sector layoff regime to the public sector.
 - **Key Legislative Success: held in Assembly Appropriations Committee.**
- [**AB 1803 \[Lowenthal\] Employment: Sexual Harassment Training and Education: Anti-hate Speech Training**](#) and [**AB 1578 \[Jackson\] State and Local Officials: Antihate Speech Training**](#) - Both AB 1803 and AB 1578 would require antihate speech training.
 - **Key Legislative Success: training rolled into existing anti-harassment training.**
- [**Cal/OSHA discussion draft of the Workplace Violence Prevention Regulation**](#) – This regulation in development implements [**SB 553 \[Cortese, 2023\] Occupational safety: workplace violence: restraining orders and workplace violence prevention plan**](#). SB 553 was signed into law September 30, 2023, and became effective July 1, 2024. With limited exceptions, the measure requires employers to develop and implement a plan for addressing workplace violence as specified in [**Labor Code Section 6401.9**](#). CSDA's advocacy on the workplace violence prevention regulation seeks to ensure workability within the day-to-day realities of public agency operations and avoid unnecessary administrative burdens. View CSDA comment letter [here](#).

Public Pension Reform:

This year has seen action on several measures aimed at reforming laws governing public pensions, including the landmark Public Employees' Pension Reform Act (PEPRA) of 2013, which helped to bring public pension costs in line with budgetary constraints, or otherwise



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making significant changes to public pensions. The bills on which CSDA has been most engaged include:

- **[AB 1383 \[McKinnor\] Public employees' retirement benefits](#)** - Undermines PEPPRA by increasing compensation cap for highly compensated employees (Miscellaneous) to \$184,500 for those whose service is included in the federal system and \$249,075 for those whose service is not included in the federal system for 2026 and lowering the retirement age for Safety (e.g., fire, police). The bill is expected to increase costs by \$4.8 billion across State, Schools, and Local Agency CalPERS plans. These estimates do not include additional costs for special districts with independent defined benefit pension plans, or those that are members of 1937 Act county retirement plans. CSDA is opposed to this measure.
- **[AB 1439 \[Garcia\] Public retirement systems: development projects: labor standards](#)** - Initially requiring certain labor standards for public pension investments in development projects, the bill was amended to request a study of implementing such standards. However, it still lays the groundwork for pension divestment based on labor standards.
 - **Key Legislative Success: amended into a study bill.**
- **[SB 1319 \[Durazo\] California Public Records Act: public investment funds](#)** - By requiring public pension systems to disclose sensitive information, this bill would have laid the groundwork for pension divestment from private investments.
 - **Key Legislative Success: held in Senate Appropriations Committee.**

Public Entity Liability Reform:

- CSDA joined a **[coalition letter](#)** to the State Legislature calling for tort liability reform for public agencies, centered on three pillars:
 - Defined benefits, including caps on damages in civil actions against public entities.
 - Proportional (several) liability for economic damages in civil actions against public entities.
 - Heightened evidentiary and procedural standards for claims where witnesses, records, and evidence archives are absent or insufficient to assign culpability.

Public Works:

CSDA and its coalition partners have been actively involved with several public works bills this year. The bills on which CSDA has been most engaged include those impacting prevailing wage and project delivery.



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- **[AB 1198 \[Haney\] Public works: prevailing wages](#)** - CSDA opposes this bill which would mandate that if the California Department of Industrial Relations determines, within a semiannual period, that there is a change in any prevailing rate of per diem wages in a locality, that determination applies to any public works contract that has been awarded, including current contracts, not simply to future contracts. CSDA opposed a version of this measure last year by the same author in the form of AB 2182, which was vetoed.
- **[AB 1859 \[Ortega\] Public works](#)** - CSDA along with our local government partners are opposed unless the bill is amended to address the coalition's concerns with the required granting of access to public works site for a member of a Joint Labor Management Committee (JLMC).
- **[AB 1881 \[Ramos\] California Indian Freedom Act of 2026](#)** - This bill would prohibit a state agency from substantially burdening the tribe's or tribal member's exercise of religious beliefs or spiritual practices on state lands. The bill creates a private right of action and would hold any government action to strict scrutiny. While the bill applies to state public lands, this bill could impact waterways significantly. CSDA continues to work with a broad coalition to oppose the bill.
- **[AB 2218 \[Kalra\] Water Policy: California Native American tribes](#)** - This bill would set up a state policy to address the historic inequities against Native American tribes that were caused by state-sanctioned acts of termination, removal, and assimilation. The policy is to acknowledge and correct these inequities through financial assistance, protection of tribal use, and consultation. This bill requires the State Water Resources Control Board, regional water quality boards, Natural Resources Agency, Delta Stewardship Council, and the Office of Land Use & Climate Innovation to consider and incorporate this policy when revising regulations, permits, or grants to address the identified inequities. CSDA continues to work with coalitions opposing the bill.
- **[Cal/OSHA Proposed Swinging and Sliding Gates Regulations](#)** - Cal/OSHA has convened an [Advisory Committee](#) and released [informal proposed regulations](#) governing horizontal sliding and swinging gates. This is likely to be submitted to formal rulemaking and goes beyond existing requirements found in [8 CCR § 3324](#). CSDA has expressed concerns during the pre-rulemaking process and has been invited to participate in an upcoming advisory committee meeting in July.

California Air Resources Board (CARB) Advanced Clean Fleets (ACF) Regulation:

Last year, CARB opened up a formal rulemaking process to amend its ACF regulation, which requires local government medium and heavy-duty fleets to transition to zero emissions vehicles (ZEVs). Mandates on private fleets have been removed by the California Air Resources Board withdrawing its waiver request from the federal government, but CARB continues to impose the mandate on public fleets operated by special districts and other local agencies. There have been two separate 15-day comment periods this year, one in April with broad changes and one in June relating to contractors' responsibilities. CSDA and our local government partners



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submitted public comments raising serious concerns that still have not been addressed. We continue to call for increased flexibility for vehicles that respond to emergency services, and raise concerns about availability, costs, infrastructure, and other obstacles to implementation of the ACF regulations.

More information on CSDA's advocacy efforts, and to learn how you can help, can be found here: csda.net/ZEVflexibility.

CSDA continues to advocate for much-needed reform to the ACF regulation, which needs to be submitted to the Office of Administrative Law (OAL) by August 1, 2026. This includes advocacy on:

- **AB 1436 [Avila Farias] State Air Resources Board: air pollution regulations: private fleets: exception** - CSDA supported this bill that would have expressly prevented CARB from directly or indirectly forcing private entities to comply with the ACF mandate, unless they obtain the necessary federal waiver to the Clean Air Act. This bill would address CARB's most recent attempt to bring private fleets into the ACF regulations just because they contract with a state or local government. This bill did not resolve all of CSDA's concerns with the ACF regulation, but would ensure that private fleets will not be included or forced to comply with ACF. Unfortunately, the bill failed to advance.



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2026 MID-YEAR LEGISLATIVE REPORT: *The Voice of Special Districts*

Reports of bills tracked by CSDA can be
[found at this link](#)

The legislation bill reports found at the above link provide links to each of the tracked measures, and if applicable, CSDA Summaries, copies of letters submitted to the Legislature by CSDA, and other pertinent information concerning bill status. The reports list CSDA's position on each bill.

The reports list the lobbyist assigned to each bill, if applicable. For additional information on a particular bill, please contact the assigned lobbyist: Director of State Legislative Affairs Aaron Avery at aarona@csda.net; Legislative Representative Brittney Barsotti at brittneyb@csda.net; Legislative Representative Marcus Detwiler at marcusd@csda.net; and Legislative Representative Anthony Tannehill at anthonyt@csda.net.

General questions can be directed to Aaron Avery.

Last Updated: July 2, 2026

**September 30, 2026 is the Governor's deadline to sign or veto bills*