Bel Marin Keys Community Services District

4 Montego Key
Novato, CA 94949

Office: 415-883-4222
www.bmkcsd.us

NOTICE & AGENDA
of the
REGULAR BOARD MEETING
January 15, 2026 –7:30PM

Board Members

Mercy Angelopulos **Cheryl Furst** **Natalia Shorten**
Vince Lattanzio **Steve Nash**

Assistance for people with disabilities: If you are disabled and need accommodation to participate in the meeting, please call our Administrative Assistant at **415.883.4222** so that the necessary arrangements can be made.

This Board Meeting is available for real-time viewing via Zoom. The meeting starts promptly at 7:30pm
The Zoom link is (cut/paste may be required):
https://us06web.zoom.us/j/8221143740?pwd=y00Gutjhsl7fQTT6tyhR9sF4HoCMGb.1
Meeting ID: 822 114 3740 Passcode: 491292
Please note that the Coordinator is unable to take telephone calls during the meeting. *Please* mute your audio. *Please* raise your hand if you wish to speak during Public Comment or regarding an item on the agenda. When called upon, please unmute your audio.

The Board meeting agenda and all supporting documents are available for public review at 4 Montego Key, Novato, California 94949, 72 hours in advance of a scheduled board meeting. Materials related to an item on this agenda submitted to the Board after distribution of the agenda packet, and not otherwise exempt from disclosure, will be made available for public inspection at the District Office at 4 Montego Key, Novato, California, during normal business hours, Monday through Friday, 8:00am to 4:00pm. Copies of supplemental materials distributed at the Board meeting will be available for public inspection at the meeting location.

I. CALL TO ORDER/ROLL CALL/PLEDGE OF ALLEGIANCE

To speak on any item under discussion by the Board on this agenda, you may do so upon receiving recognition from the Chair. Time limitations on public testimony may be imposed at the discretion of the President in conformity with Board Meeting Policy Provisions. ***(Please Turn off Cell Phones)***

II. APPROVAL OF MINUTES

The Board of Directors will review, amend, and approve the prior month's meeting Minutes.

a. Regular Meeting of December 18, 2025. **Action item**

III. CONSENT CALENDAR

Matters listed under the Consent Calendar are considered to be routine and will be enacted by one motion and one vote. There will be no separate discussions of these matters. If the Board or the public desires discussion, that item will be removed from the Consent Calendar and will be considered separately.

a. Ratification of Checks and Payroll Issued December 2025 – Attached -**Action item**

IV. PUBLIC COMMENT

a. *Citizen Business/Oral and Written Communications on items not appearing on this agenda. Residents are advised to limit discussion to one presentation per individual. Please observe the time limit of three(3) minutes. Please fill out a BMKCSD Public Comment Sign-In Card and present it to the Clerk.* ***Note:*** *Any item raised by a member of the public, which does not appear on the agenda, but which may require Board action shall be referred to the District Staff for investigation and disposition – unless the item requires emergency action by the Board or the need to take such action arose after the posting of the agenda within the meaning of Cal. G.C. §54954.2(b)*

b. Zoom attendance = In person attendance =

c. Correspondence and/or Presentations

V. ADMINISTRATIVE COMMUNICATIONS

a. District Manager's Report

1. Financial
    a. O'Connor & Company CPA- DM and Bookkeeper would like to continue with CPA for FY 24-25 Discussion **Action item**
    b. Check run for December 16, 2025 – Vendors have not received payment. Contacted USPS and requested research for mail pick up and fraud. Service Request #84679975. Spoke to Edgar Bank of Marin asked for stop payment fee to be waived ($20 each check). Options for paying bills-ACH(fee based monthly and per item), positive pay(fee based monthly and per item), bill pay(no charge) or credit card. Called each vendor to see if they received a check from us and asked to waive any late fees.
    c. Form 700 Statement of Economic Interest -due April 1, 2026

2. Operations
    a. Board of Directors- Election of officers
    b. DM's email was compromised on December 6, 2026. Requests everyone to change their email password. We will be going to two factors (2FA) authentication moving forward.
    c. DRAFT Employee Handbook revision – attached Discussion
    d. Board retreat dates – Shawn Langwell dates available March 28, March 29, April 4 Discussion
    e. Dolphin gate – chain and battery have been installed. Gate is not responding properly to photo eye and magnetic strips. Ramp sensor is damaged. Awaiting proposal
    f. Parks- replaced arm pads on exercise equipment at Sunset Park, Rocks to be delivered January 12, 2026, total cost Measure A **$439.08** - fill in the planter/sidewalk area in front of Sunset Park; A test bench was pressure washed with battery operated pressure washer.

3. Calendar
    Yoga - January/February every Monday unless there is a holiday
    January 26, 2026 Fraud Seminar 4:15-5:15pm -Lisa's event

January 31, 2026 BMKCSD Chili Cook Off 10am -2pm - Kim's event
February 3, 2026 Measure A Parks Meeting 6:30pm
February 16, 2026 CSD Closed – President's Day
February 18, 2026 N2N submission deadline 4:00pm
February 19, 2026 Board of Directors Meeting 7:30pm
February 25, 2026 Street Sweeper

a. *Ad hoc* Committee Reports
   1. BMK Community Safety Committee Report(ERT/Traffic/PGE)
      a. ERT Update – Meeting January 7, 2026
      b. Traffic- DPW Ped/parking/red zones/traffic –**Presentation from John Neville DPW (move to beginning of meeting)**
   2. Beautification Committee Report-
   3. Welcome to the Keys Committee Report-
   4. Communications Committee Report-
      1. Website update- Design was to be completed at end of December 2025. Received notice the design completion is now the week of January 12, 2026. Training for the CSD staff to start January 20, 2026.
   5. Special Waterways Committee Report- Meeting January 5, 2026

VI. STANDING COMMITTEE REPORT A, D & G

a. Measure A -Parks and Open Space Committee Report
   1. January 6, 2026 Meeting Minutes- Candra Canning
   2. Bench Program presentation- Diane McKone and Candra Canning (attachment) – **Action item**

b. Measure D -Waterways Maintenance Committee Report –Lagoons- **Presentation from Eli Kersh/Lake Tech** -Chemical permit and Aeration & fountain repair kits estimates attached **(move to beginning of meeting)**

c. Measure G -Oversight/Infrastructure Committee Report
   1. January 11, 2026 Meeting Minutes
   2 Svendsen's Marine - Work change order #513882 fabricate eighteen stop logs **$117,157.25 plus $3,164.00 delivery total $120,321.25 –Action item**
   4. WRA -Update Zoom Meeting January 9, 2026
   5. SGH – Update awaiting permitting review before proceeding with drawings
   6. Energy Experts- Hydraulic reconditioned cylinder #2-update – awaiting service date end of January or early February

VII. UNFINISHED BUSINESS

VIII. NEW BUSINESS

IX. ITEMS OF COMMUNITY INTEREST

a. SCC – Update-Land transfer – sent email to Linda Tong-USACE has not provided formal approval, but the Conservancy can continue coordinating with USACE on next steps
b. Pattern Energy – Update
c. Novato Creek Bayland Strategy – Clean water report, environmental informatics, and resilient landscape
d. Cal Trans-Highway 37 project – First project MTC/Cal Trans to elevate bridge 2026-2028

X. FUTURE AGENDA ITEMS

a. Update Policies and Procedures
b. Town Hall

XI. ADJOURNMENT

a. All matters before the Board are being addressed

****Next regular Board of Directors meeting: February 19, 2026****

Certificate of Posting

I declare under penalty of perjury under the laws of the State of California, that I am employed by the Bel Marin Keys Community Services District, and that I caused this Notice & Agenda to be posted on the District's website (www.bmkcsd.us), as well as on the interior and exterior bulletin boards located at the District Office, 4 Montego Key, Novato, California, on the date reflected below.

Lisa Lue, Board Clerk

Date January 9, 2026

Bel Marin Keys Community Services District

January 15, 2026
Regular Board Meeting

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Bel Marin Keys Community Services District

4 Montego Key
Novato, CA 94949

Office: 415-883-4222
www.bmkcsd.us

MINUTES
REGULAR BOARD MEETING
December 18, 2025 –7:30PM

Board Members

Mercy Angelopulos **Cheryl Furst** **Natalia Shorten**
Vince Lattanzio **Steve Nash**

I. CALL TO ORDER/ROLL CALL/PLEDGE OF ALLEGIANCE

The Agenda for this meeting was posted/published on December 11, 2025. President Nash called the Regular Board Meeting to order at 7:30pm and called roll. The directors present along with Steve Nash were, Vince Lattanzio, Mercy Angelopulos, Natalia Shorten and excused absence was Cheryl Furst. A quorum was established, and the pledge of allegiance was recited. Minutes conducted by Board Clerk, Lisa Lue.

II. APPROVAL OF MINUTES

The Board of Directors will review, amend, and approve the prior month's meeting Minutes.

a. Regular Meeting of November 20, 2025.

Motion to approve November 20, 2025 Minutes
Moved by Director Lattanzio; Seconded by Director Nash
Director Vote: 4 Ayes; 1 Absent
Motion Carried

III. CONSENT CALENDAR

a. Ratification of Checks and Payroll Issued November 20, 2025

Motion to approve ratification of checks and payroll issued November 2025
Moved by Director Lattanzio; Seconded by Director Nash
Director Vote: 4 Ayes; 1 Absent
Motion Carried

IV. PUBLIC COMMENT

a. Zoom attendance = **3** In person attendance = **13**

b. Correspondence and/or Presentations
Resident Alberigi- Email received-Microphones and Video/Audio recordings for Board of Directors Meetings

d. Brian McKone-N. Lagoon no board representation; Vegetation treatment options. Locks-Measure G status and update. I would like to be on committee

c. Margarita T-Skiing and buoy placement. Son speaks and wants to swim in front of house, but unsafe.

V. **ADMINISTRATIVE COMMUNICATIONS**

a. District Manager's Report

1. Financial

a. FY 23-24 Draft for approval-Attached

Motion to approve draft audit FY 23-24
Moved by Director Lattanzio; Seconded by Director Angelopulos
Director Vote: 4 Ayes; 1 Absent
Motion Carried

b. O'Connor & Company CPA invoice attached - **$9,331.25** paid

c. Checks *not* cashed from Board members. Discussion previously mentioned checks not cashed in after six months; check will be forfeited. Bookkeeper is requesting motion on procedure.

Motion to approve for directors with outstanding checks(uncashed) after 6 months will be forfeited.
Vendor checks DM will call after three months to remind them to cash
Moved by Director Lattanzio; Seconded by Director Shorten
Director Vote: 4 Ayes; 1 Absent
Motin Carried

2. Operations

a. Lake Tech – Proposal # 72 Bathymetric Mapping – N. Lagoon. Single beam sonar, cloud-based mapping software to monitor changes in water volume, contour, sedimentation, and plant biomass. -Attached **$7,360.**

Motion to approve Lake Tech Bathymetric mapping of North Lagoon
Moved by Director Nash; Seconded by Director Lattanzio
Director Vote: 4 Ayes; 1 Absent
Motion Carried

1. Lake Tech chemical permit– Update Permit status for lagoon treatment. **TABLED until January 15, 2026 meeting. Invite Eli Kersh to meeting for clarification on permit**
2. Aeration & Fountain repair kits – Attached estimate #92 **$4807.57**
TABLED until January 15, 2026 meeting
3. Buoy in a box North Lagoon -January 1, 2026 to December 31, 2026- Attached Estimate #93 **$7,250.00**

Motion to approve Buoy in a box to be installed by Lake Tech-Eli Kersh
Moved by Director Lattanzio; Seconded by Director Nash
Director Vote: 4 Ayes; 1 Absent
Motion Carried

b. Wesley Performance Marine- Pontoon service Invoice Attached - **$6,302.00. Approved** amount was **$4,608.00** in June 2025. Discovered additional items requiring repair. District Manager approved additional **$1,694.00** amount.

c. Craft Fair – update seven incredibly talented vendors, some vendors sold out early. Well attended by community. Request was made for Spring Craft Fair.

3. Calendar

Food Drive through end of December – sponsored by Yacht Club. Donations accepted during office hours.
Yoga -restarts in January every Monday
December 20, 2025 – Lighted Boat Parade 5:30pm
December 22 , 2025 – Bookmobile 3-4pm Corner of Montego/BMK Blvd
December 25, 2025- CSD Office Closed
December 31, 2025 – Street sweeper 8am -3pm
December 31, 2025 CSD Office Closed

January 1, 2026 CSD Office Closed
January 1, 2026 Icicle Day 10am to 1pm
January 6, 2026 Measure A Parks & Open Space Meeting 6:30pm
January 10, 2026 BMK Yacht Club Open House 2-4pm
January 15, 2026 Board of Directors Meeting 7:30pm
January 26, 2026 Fraud Seminar 4:15-5:15pm Sign-up sheet in the office
January 31, 2026 BMKCSD Chili Cook Off 10am -2pm - Kim

a. *Ad hoc* Committee Reports
   1. BMK Community Safety Committee Report(ERT/Traffic/PGE)
      a. ERT Update - None
      b. Traffic- DPW Ped/parking/red zones/traffic – Update Meeting December 12, 2025, DPW to attend January 15, 2026 Board Meeting with information on Phase 1 Traffic lanes and parking issues
      c. DPW – Speed hump petition -Phase 2 March 19, 2026 Board Meeting. Requires vote from residents on Montego Key
      d. PGE Update-None
   2. Beautification Committee Report-None
   3. Welcome to the Keys Committee Report-Three welcome gift baskets were presented to new residents. Suggestion for showing new residents around the Keys. Four committee members currently on committee
   4. Communications Committee Report-
      1. Website update- Accessibility issues, will work around 2027 deadline for compliance. Video shown to audience. New website to launch early 2026
   5. Special Waterways Committee Report- Meeting December 6, 2025 Director Nash appointed Christine Hoburg, Terry Friesen, Robin Lee, and Brian Clark to join him on this committee. January Board meeting will report on the N. Lagoon, safety and buoys will be discussed.

VI. STANDING COMMITTEE REPORT A, D & G

a. Measure A -Parks and Open Space Committee Report
    1. Park survey- No update. Meeting January 6, 2026 6:30pm
b. Measure D -Waterways Maintenance Committee Report
c. Measure G -Oversight/Infrastructure Committee Report
    1. SGH – General Engineering Services. Paid **$690.50**
    2 Svenson's Marine - Work change order #513882 fabricate eighteen stop logs **$117,157.25 plus $3,164.00 delivery total $120,321.25 – Measure G Unable to locate Motion for this amount TABLED until Measure G meeting January 2026**
    4. WRA -Permitting fees (Biological report, Cultural & Historical Resource(EBA), US Army Corp(USACE), Regional Water Quality(RWQCB), CA Dept of Fish & Wildlife(CDFW) paid invoice **$12,202.00 – For Measure G Meeting January 2026**
    5. DM to check availability with Measure G Committee for January 2026 meeting date.

VII. UNFINISHED BUSINESS

VIII. NEW BUSINESS

IX. ITEMS OF COMMUNITY INTEREST

a. Refuge – Update
b. SCC – Update-Land transfer – SCC should provide boundary information – DM to follow up with SCC on levee transfer
c. Pattern Energy – Update
d. Novato Creek Bayland Strategy – Clean water report, environmental informatics, and resilient landscape
e. Cal Trans-Highway 37 project – First project MTC/Cal Trans to elevate bridge 2026-2028

X. FUTURE AGENDA ITEMS

a. Marine Engineers Request for qualifications (RFQ)
b. Construction/Project manager for marine infrastructure (RFQ)-
c. Update Employee Handbook
d. Update Policies and Procedures
e. Town Hall-Spring time on a weekend for better resident participation. To include all Measure committees
f. Board Retreat dates- Spring time

XI. ADJOURNMENT

a. All matters before the Board are being addressed

Motion to adjourn 8:34pm
Moved by Director Nash; Seconded by Director Lattanzio
Director Vote: 4 Ayes, 1 Absent
Motion Carried

****Next regular Board of Directors meeting: January 15, 2026****

Certificate of Posting

I declare under penalty of perjury under the laws of the State of California, that I am employed by the Bel Marin Keys Community Services District, and that I caused this Notice & Agenda to be posted on the District's website (www.bmkcsd.us), as well as on the interior and exterior bulletin boards located at the District Office, 4 Montego Key, Novato, California, on the date reflected below.

/s/

Lisa Lue, Board Clerk

Date December 29, 2025

Bel Marin Keys Community Services District

RATIFICATION OF WARRANTS AND PAYROLL

FOR THE REGULAR MEETING OF January 15, 2026

In accordance with Government Code §37208, ratification of the following warrant amounts is presented to the Bel Marin Keys Community Services District Board of Directors:

Regular Payable Checks:	$ 68,403.95
Payroll Checks:	$ 18,863.98
Total Disbursements:	**$ 87,267.93**

All individual warrants and warrant registers are available for review by the Board Members and the public upon request. Payroll registers are confidential and not available for individual review in accordance with State Law.

The necessary internal controls are in place to safeguard the District's conformance with Generally Accepted Accounting Principles, sound business practices, and prudent budgetary principles. Payroll documents and warrant invoices have been reviewed and approved by the District Manager before payment.

Lisa Lue, Board Clerk

January 9, 2026

BMKCSD - Checking Accounts December 1, 2025 to December 31, 2025

Account	Date	Trans Type	#	Name	Memo/Description	Amount	Measure
Operating Account - 5682	12/30/2025	Check	10	RBA Bookkeeping Services		$ 1,593.75	
Operating Account - 5682	12/30/2025	Check	9	Kristin Addicks	Rental deposit return	$ 500.00	
Operating Account - 5682	12/30/2025	Check	8	Primo Brands		$ 63.53	
Operating Account - 5682	12/30/2025	Check	7	PG&E		$ 2,351.32	
Operating Account - 5682	12/30/2025	Check	6	Lisa Eiselin	Rental deposit return	$ 500.00	
Operating Account - 5682	12/30/2025	Check	5	Lisa Lue	#2 Holiday Craft Fair	$ 39.84	
Operating Account - 5682	12/30/2025	Check	4	Electronic Innovations	dolphin gate diagnosis	$ 570.00	D
Operating Account - 5682	12/30/2025	Check	3	DC Electric		$ 144.00	
Operating Account - 5682	12/30/2025	Check	2	Mercy Angelopulos	Gift baskets	$ 327.68	

Operating Account - 5682	12/30/2025	Check	1	NBS Government Fund	Measure D & Measure G	$	1,619.51	D&G
Operating Account - 5682	12/16/2025	Check	2234	AT&T	Calypso	$	207.13	D
Operating Account - 5682	12/16/2025	Check	2233	AT&T	Dolphin	$	207.13	D
Operating Account - 5682	12/16/2025	Check	2232	AT&T	Bahama	$	196.50	D
Operating Account - 5682	12/16/2025	Check	2231	Mercy Angelopulos	dir fee	$	100.00	
Operating Account - 5682	12/16/2025	Check	2229	Vince Lattanzio	dir fee	$	100.00	
Operating Account - 5682	12/16/2025	Check	2228	Steve Nash	dir fee	$	100.00	
Operating Account - 5682	12/16/2025	Check	2227	Natalia Shorten	dir fee	$	100.00	
Operating Account - 5682	12/16/2025	Check	2226	Napa Solano Yolo		$	324.00	D
Operating Account - 5682	12/16/2025	Check	2225	Maura Walsh Ochoa	Rental deposit return	$	500.00	
Operating Account - 5682	12/16/2025	Check	2224	Flock Group		$	6,000.00	

Operating Account - 5682	12/16/2025	Check	2223	LakeTech	N. Lagoon permit consultation	$ 3,500.00	D
Operating Account - 5682	12/16/2025	Check	2222	Wesley Marine	Pontoon boat annual repair	$ 6,302.00	D
Operating Account - 5682	12/16/2025	Check	2221	Access		$ 71.91	
Operating Account - 5682	12/16/2025	Check	2220	Cintas Corp		$ 161.49	
Operating Account - 5682	12/16/2025	Check	2219	RBA Bookkeeping Services		$ 4,356.25	
Operating Account - 5682	12/9/2025	Check	2218	O'Connor & Company		$ 9,331.25	
Operating Account - 5682	12/9/2025	Check	2217	Comcast		$ 140.57	
Operating Account - 5682	12/9/2025	Check	2216	AT&T	Multi court	$ 198.32	A
Operating Account - 5682	12/9/2025	Check	2215	SGH	Levee survey	$ 690.00	G
Operating Account - 5682	12/9/2025	Check	2214	Pini Ace Hardware		$ 113.95	
Operating Account - 5682	12/9/2025	Check	2213	WRA, Inc		$ 12,202.00	G

Operating Account - 5682	12/9/2025	Check	2212	Mill Valley Refuse	Porta Potty	$ 210.30	A
Operating Account - 5682	12/9/2025	Check	2211	Cintas Corp		$ 167.82	
Operating Account - 5682	12/2/2025	Check	2209	RBA Bookkeeping Services		$ 225.00	
Operating Account - 5682	12/2/2025	Check	2208	North Marin Water District		$ 2,329.77	
Operating Account - 5682	12/2/2025	Check	2207	Recology		$ 400.15	
Operating Account - 5682	12/2/2025	Check	2206	PKS Professional Kitchen		$ 355.50	
Operating Account - 5682	12/2/2025	Check	2205	Brightview		$ 7,127.62	
Operating Account - 5682	12/2/2025	Check	2204	First Citizen Bank		$ 486.16	
Operating Account - 5682	12/2/2025	Check	2203	MCC Building Maintenance		$ 277.50	
Operating Account - 5682	12/2/2025	Check	2202	State Water Resources Control Bo	DMMS	$ 4,212.00	D

DEPARTMENT SUMMARY

0083 1308-1638 Bel Marin Keys C S D

HOURS							EARNINGS								
CHECK DATE	REG	OT	VAC	HOL	SICK	ALL OTHER HOURS	REG	OT	VAC	HOL	SICK	BONUS	COMM	ALL OTHER EARNINGS	TOTAL
12/05/25	44.00	7.50		32.00	10.00		10,199.39	281.25							10,480.64
MTD (DEC)	44.00	7.50		32.00	10.00		10,199.39	281.25							10,480.64
QTD (Q4)	263.00	7.50		48.00	38.25		41,366.71	281.25			300.00				41,947.96
YTD (2025)	1,415.75	14.00	36.00	96.00	66.75		198,954.16	628.35	1,139.20	1,139.20	481.00				202,341.91

REIMBURSEMENTS & OTHER PAYMENTS					OTHER ITEMS (DO NOT INCREASE NET PAY)			
CHECK DATE	EXP REIMB NON TAX	1099-MISC	OWNER DRAW	TOTAL	401K ER MATCH	SIMPLE IRA ER	QSEHRA-MEMO	
12/05/25	276.26			276.26		272.99	*M276.26*	
MTD (DEC)	276.26			276.26		272.99	*M276.26*	
QTD (Q4)	1,381.30			1,381.30		1,043.75	*M1,381.30*	
YTD (2025)	6,886.38			6,886.38		5,125.69	*M6,886.38*	

EMPLOYEE WITHHOLDINGS										
CHECK DATE	SOC SEC	MEDICARE	FED INCOME TAX	STATE INCOME TAX		LOCAL INCOME TAX	LOCAL INCOME TAX	LOCAL INCOME TAX	ALL OTHER WITHHOLDINGS		TOTAL
12/05/25	649.81	151.97	1,311.87	CA	558.56				CA Disability	125.77	2,797.98
MTD (DEC)	649.81	151.97	1,311.87	CA	558.56				CA Disability	125.77	2,797.98
QTD (Q4)	2,600.78	608.25	4,061.23	ALL	1,641.27				Disability	503.40	9,414.93
YTD (2025)	12,545.20	2,933.95	17,413.98	ALL	7,066.33				Disability	2,428.17	42,387.63

EMPLOYEE DEDUCTIONS				
CHECK DATE	401K EE PRETAX	SIMPLE IRA EE	ALL OTHER DEDUCTIONS	TOTAL
12/05/25		571.51		571.51
MTD (DEC)		571.51		571.51
QTD (Q4)		3,643.79		3,643.79
YTD (2025)		18,932.56		18,932.56

EMPLOYER LIABILITIES											
CHECK DATE	SOC SEC	MEDICARE	FED UNEMPLOY	STATE UNEMPLOYMENT (SUI)	SUI RATE	ALL OTHER LIABILITIES		TOTAL	FEDERAL LIABILITY CHECK DATE	FEDERAL LIABILITY TOTAL 941 TAX LIABILITY	NET PAY
12/05/25	649.80	151.98						801.78	12/05/25	2,915.43	7,387.41
MTD (DEC)	649.80	151.98						801.78	MTD (DEC)	2,915.43	7,387.41
QTD (Q4)	2,600.77	608.29						3,209.06	QTD (Q4)	10,479.32	30,270.54
YTD (2025)	12,545.12	2,934.09	202.79	ALL 2,095.49		Disability	-0.04	17,777.45	YTD (2025)	48,372.34	147,908.10

DEPARTMENT SUMMARY

0083 1308-1638 Bel Marin Keys C S D

	HOURS						EARNINGS								
CHECK DATE	REG	OT	VAC	HOL	SICK	ALL OTHER HOURS	REG	OT	VAC	HOL	SICK	BONUS	COMM	ALL OTHER EARNINGS	TOTAL
12/05/25	44.00	7.50		32.00	10.00		10,199.39	281.25							10,480.64
12/19/25	57.00				2.00		8,383.34								8,383.34
MTD (DEC)	101.00	7.50		32.00	12.00		18,582.73	281.25							18,863.98
QTD (Q4)	320.00	7.50		48.00	40.25		49,750.05	281.25			300.00				50,331.30
YTD (2025)	1,472.75	14.00	36.00	96.00	68.75		207,337.50	628.35	1,139.20	1,139.20	481.00				210,725.25

	REIMBURSEMENTS & OTHER PAYMENTS				OTHER ITEMS (DO NOT INCREASE NET PAY)			
CHECK DATE	EXP REIMB NON TAX	1099-MISC	OWNER DRAW	TOTAL	401K ER	MATCH	SIMPLE IRA ER	QSEHRA-MEMO
12/05/25	276.26			276.26			272.99	*M276.26*
12/19/25	276.26			276.26			98.75	*M276.26*
MTD (DEC)	552.52			552.52			371.74	*M552.52*
QTD (Q4)	1,657.56			1,657.56			1,142.50	*M1,657.56*
YTD (2025)	7,162.64			7,162.64			5,224.44	*M7,162.64*

	EMPLOYEE WITHHOLDINGS									
CHECK DATE	SOC SEC	MEDICARE	FED INCOME TAX	STATE INCOME TAX		LOCAL INCOME TAX	LOCAL INCOME TAX	LOCAL INCOME TAX	ALL OTHER WITHHOLDINGS	TOTAL
12/05/25	649.81	151.97	1,311.87	CA	558.56				CA Disability 125.77	2,797.98
12/19/25	519.76	121.57	677.56	CA	269.26				CA Disability 100.60	1,688.75
MTD (DEC)	1,169.57	273.54	1,989.43	CA	827.82				CA Disability 226.37	4,486.73
QTD (Q4)	3,120.54	729.82	4,738.79	ALL	1,910.53				Disability 604.00	11,103.68
YTD (2025)	13,064.96	3,055.52	18,091.54	ALL	7,335.59				Disability 2,528.77	44,076.38

	EMPLOYEE DEDUCTIONS					
CHECK DATE	401K EE PRETAX	401K SMPL EE CATCHUP	SIMPLE IRA EE	SMPL IRA EE CATCH UP	ALL OTHER DEDUCTIONS	TOTAL
12/05/25			571.51			571.51
12/19/25			98.75	1,249.94		1,348.69
MTD (DEC)			670.26	1,249.94		1,920.20
QTD (Q4)			3,742.54	1,249.94		4,992.48
YTD (2025)			19,031.31	1,249.94		20,281.25

	EMPLOYER LIABILITIES								FEDERAL LIABILITY		NET PAY
CHECK DATE	SOC SEC	MEDICARE	FED UNEMPLOY	STATE UNEMPLOYMENT (SUI)	SUI RATE	ALL OTHER LIABILITIES		TOTAL	CHECK DATE	TOTAL 941 TAX LIABILITY	
12/05/25	649.80	151.98						801.78	12/05/25	2,915.43	7,387.41
12/19/25	519.76	121.56						641.32	12/19/25	1,960.21	5,622.16
MTD (DEC)	1,169.56	273.54						1,443.10	MTD (DEC)	4,875.64	13,009.57
QTD (Q4)	3,120.53	729.85						3,850.38	QTD (Q4)	12,439.53	35,892.70
YTD (2025)	13,064.88	3,055.65	202.79	ALL 2,095.49		Disability	-0.04	18,418.77	YTD (2025)	50,332.55	153,530.26

Good Morning, Lisa Lue

ACCOUNTS

Bank of Marin Measure A Checking -15586

Current Balance	**$5,000.00**
Available Balance	$5,000.00

Bank of Marin Measure D Checking -42715

Current Balance	**$5,000.00**
Available Balance	$5,000.00

Bank of Marin Operations Checking -75682

Current Balance	**$69,581.42**
Available Balance	$69,581.42

Bank of Marin Measure G Checking -83912

Current Balance	**$5,000.00**
Available Balance	$5,000.00

Bank of Marin Operations Savings -07191

Current Balance	**$2,574,235.08**
Available Balance	$2,574,235.08

Bank of Marin Measure D Savings -10195

Current Balance	**$766,300.77**
Available Balance	$766,300.77

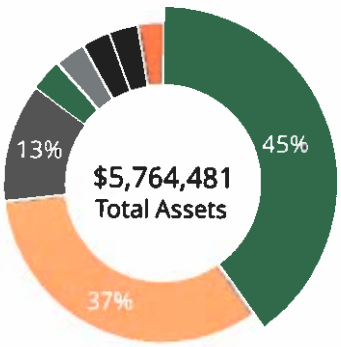
Bank of Marin Measure G Savings -37296

Current Balance	**$2,127,401.47**
Available Balance	$2,127,401.47

Bank of Marin Measure A Savings -38521

Current Balance	**$211,962.37**
Available Balance	$211,962.37

ASSET SUMMARY



Operations Savings

XXXXX07191 — 44.66%

Current Balance	$2,574,235.08
Available Balance	$2,574,235.08

2025-2026 Statement of Economic Interests

Form 700

A Public Document

Table of Contents

Helpful Resources

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

California Fair Political Practices Commission

1102 Q Street, Suite 3050 • Sacramento, CA 95811
Email Advice: advice@fppc.ca.gov
Toll-free advice line: 1 (866) ASK-FPPC • 1 (866) 275-3772
Telephone: (916) 322-5660 • Website: www.fppc.ca.gov

December 2025

Quick Start Guide

Detailed instructions begin on page 3.

WHEN IS THE ANNUAL STATEMENT DUE?

- March 2 – Elected State Officers, Judges (Supreme, Appellate, Superior Court), Retired Judges, Pro Tem Judges, Court Commissioners, State Board and Commission members listed in Government Code Section 87200
- April 1 – Most other filers

WHERE DO I FILE?

Most people file the Form 700 with their agency. Certain filers are required to file electronically with the FPPC. (See next page). If you're not sure where to file your Form 700, contact your filing officer or the person who asked you to complete it.

ITEMS TO NOTE!

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

NOTHING TO REPORT?

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

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

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

QUESTIONS?

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

E-FILING ISSUES?

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

What's New

Gift Limit Increase

The gift limit increased to **$630** for calendar years **2025** and **2026**. The gift limit in calendar year 2024 was $590.

Required Electronic Filing for FPPC (Section 87500) Filers
Certain candidates and officials specified in Section 87500 are now required to file their Form 700 electronically using the FPPC's e-filing system. Filers for the offices listed under Section 87500 should contact the FPPC at form700@fppc.ca.gov to obtain their login and password information.

Reporting Prospective Employment
Effective January 1, 2026, Section 87200 Filers must report any arrangement for prospective employment on attachment Form 700-P. Attachment Form 700-P is filed electronically via the FPPC's e-filing portal. (See Reference Pamphlet, page 16, for more information.)

Who must file:

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

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

For more information, see Reference Pamphlet, page 3, at *www.fppc.ca.gov.*

Where to file:

Code Filers — State and Local Officials, Employees, and Consultants Designated in a Conflict of Interest Code: File with your agency, board, or commission unless otherwise specified in your agency's code (e.g., Legislative staff files directly with FPPC). In most cases, the agency, board, or commission will retain the statements.

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

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

Multi-County Agencies, Boards, Commissions: File with your agency, board, or commission unless otherwise specified in your agency's code. Please review your agency's conflict of interest code as some multi-county offices are required to file electronically with the FPPC. In most cases, the agency, board, or commission will retain the statements.

87200 State Filers, for offices not specified in Section 87500, file as follows: File with your agency, board, or commission unless otherwise specified in your agency's code. Please review your agency's conflict of interest code as some 87200 state offices are required to file electronically with the FPPC. In most cases, the agency, board, or commission will retain the statements.

87200.5 Filers — Groundwater Sustainability Agency: Members of the Board of Directors and Executives (e.g., Executive Director, General Manager, or other equivalent position) file electronically with the FPPC.

Officials and Candidates Specified in Section 87500, FPPC Filers: The Act requires that the following officeholders and candidates for the positions listed below file electronically using the FPPC's e-filing system.

- Statewide elected officers and candidates for statewide elective office. (For a complete list of statewide elected officers please see Reference Pamphlet, Page 6.)
- Members and candidates for the Legislature and State Board of Equalization
- Designated employees of the Legislature directed to file with the FPPC by the house of the Legislature by which they are employed
- Members of the Public Utilities Commission, State Energy Resources Conservation and Development Commission, or California Coastal Commission
- Members of a state licensing or regulatory board, bureau, or commission
- Members of the Fair Political Practices Commission
- Appointed members to a state board, commission, or similar multimember body of the state if the FPPC has been designated as the filing officer in the conflict of interest code of the respective board, commission, or body. (Please contact your agency for a copy of your agency's conflict of interest code.)
- Designated employees of more than one joint powers insurance agency who elect to file a multiagency statement pursuant to Section 87350
- Judges (Supreme, Appellate, Superior Court), Retired Judges, Pro Tem Judges, court commissioners, or candidates for judge
- Officeholder or candidate for the office of district attorney, county counsel, county treasurer, or county board of supervisors
- Officeholder or candidate for the office of city council member, city treasurer, city attorney, or mayor
- County chief administrative officer, city manager, or if there is no city manager, the chief administrative officer
- County or city planning commissioner
- Head of a local government agency or member of a local government board or commission, if the FPPC has been designated as the filing officer in the conflict of interest code of the respective agency, board, or commission. (Please contact your agency for a copy of your agency's conflict of interest code.)
- A public official who manages public investments

Candidates, for offices not listed in Section 87500 above, file as follows:

- County offices (e.g., candidates running for local elective office that are designated in a conflict of interest code): File with your county elections official.
- City offices (e.g., candidates running for local elective office that are designated in a conflict of interest code): File with your City Clerk.
- Multi-county offices: File with your county elections official with whom you file your declaration of candidacy.

What to Know
Continued

How to file:

The Form 700 is available at *www.fppc.ca.gov*. Additional PDF schedules of Form 700 are available on the FPPC's website. Form 700 schedules are also available in Excel format. Filers should always check with their filing officer to see if their agency requires a particular filing method. All statements are signed under penalty of perjury and must be verified by the filer. See Regulation 18723.1(c) for filing instructions for copies of expanded statements. Depending on your agency's requirements, statements can be required to be filed in the following formats:

Wet Signature ➲ Each Statement must have a handwritten "wet" signature. Wet signature statements can be filed either by hand delivery or mail.

Digital Signature ➲ Each statement must be signed with a verified digital signature via the filer's agency email address *if permitted by the filing officer*. The statement must be sent by email as a PDF with the digital signature affixed to the document. (See Regulations 18104 and 18757, as well as FPPC's Filing with a Digital Signature Fact Sheet for additional guidance).

Electronic Signature ➲ Each statement must be signed with a secure electronic signature submitted using an approved electronic filing system. Filers must be duly authorized by their filing officer to file electronically under Government Code Section 87500.2.

When to file:

Annual Statements

➲ **March 2, 2026**

- Elected State Officers
- Judges (Supreme, Appellate, Superior Court), Retired Judges, Pro Tem Judges, and Court Commissioners
- State Board and State Commission Members listed in Government Code Section 87200

➲ **April 1, 2026**

- Most other filers

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

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

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

Assuming Office and Leaving Office Statements

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

Exception:

If you assumed office between October 1, 2025, and December 31, 2025, and filed an assuming office statement, you are not required to file an annual statement until March 1, 2027, or April 1, 2027, whichever is applicable. The annual statement will cover the day after you assumed office through December 31, 2026. (See Reference Pamphlet, page 7, for additional exceptions.)

Candidate Statements

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

Certain candidates listed in Government Code Section 87500, FPPC Filers, are required to file their candidate statement electronically via the FPPC's e-filing system. Please refer to Page 3, Where to File section, for the list of offices required to file electronically with FPPC. Filers for the offices listed under Section 87500 should contact the FPPC at form700@fppc.ca.gov to obtain their login and password information.

Late Statements

There is no provision for filing deadline extensions unless the filer is serving in active military duty. (See page 20 for information on penalties and fines.)

Amendments

Statements may be amended at any time. You are only required to amend the schedule that needs to be revised. It is not necessary to amend the entire filed form. The amended schedule(s) is attached to your original filed statement. Obtain amendment schedules at *www.fppc.ca.gov*. Filers authorized to file electronically amend their statements using their agency's electronic filing system. *Note:* If you are a candidate or officeholder listed under Government Code Section 87500, FPPC Filers, then you must amend your statements electronically using the FPPC's e-filing system.

Types of Statements

Assuming Office Statement:

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

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

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

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

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

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

Annual Statement:

Generally, the period covered is January 1, 2025, through December 31, 2025. If the period covered by the statement is different than January 1, 2025, through December 31, 2025, (for example, you assumed office between October 1, 2024, and December 31, 2024 or you are combining statements), you must specify the period covered.

- Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement must be reported. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2025.
- If your disclosure category changes during a reporting period, disclose under the old category until the effective date of the conflict of interest code amendment and disclose under the new disclosure category through the end of the reporting period.

Leaving Office Statement:

Generally, the period covered is January 1, 2025, through the date you stopped performing the duties of your position. If the period covered differs from January 1, 2025, through the date you stopped performing the duties of your position (for example, you assumed office between October 1, 2024, and December 31, 2024, or you are combining statements), the period covered must be specified. The reporting period can cover parts of two calendar years.

- Report: Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2025.

Candidate Statement:

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

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

Amendments:

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

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

Expanded Statement:

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

CALIFORNIA FORM **700**
FAIR POLITICAL PRACTICES COMMISSION

STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT

Date Initial Filing Received
Filing Official Use Only

Please type or print in ink.

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

1. Office, Agency, or Court

Agency Name *(Do not use acronyms)*

Division, Board, Department, District, if applicable

Your Position

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

Agency: Position:

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

☐ State

☐ Judge (Supreme, Appellate, Superior Court), Retired Judge, Pro Tem Judge, or Court Commissioner (Statewide Jurisdiction)

☐ Multi-County

☐ County of

☐ City of

☐ Other

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

☐ **Annual:** The period covered is January 1, 2025, through December 31, 2025.

-or-

The period covered is ____/____/____, through December 31, 2025.

☐ **Assuming Office:** Date assumed ____/____/____

☐ **Leaving Office:** Date Left ____/____/____
(Check one circle below.)

☐ The period covered is January 1, 2025, through the date of leaving office.

-or-

☐ The period covered is ____/____/____, through the date of leaving office.

☐ **Candidate:** Date of Election and office sought, if different than Part 1:

4. Schedule Summary (required)

► ***Total number of pages including this cover page:*** ____

Schedules attached

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

☐ **Attachment 700-P** - *Prospective Employment (87200 Filers Only)* – schedule attached

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

5. Verification

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

DAYTIME TELEPHONE NUMBER ( ) EMAIL ADDRESS

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

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

Date Signed *(month, day, year)*

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

Instructions
Cover Page

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

Part 1. Office, Agency, or Court

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

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

Example:

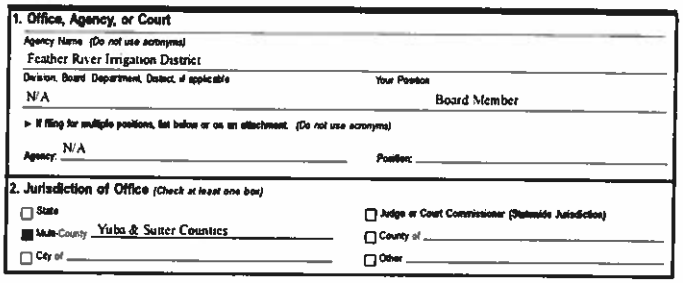
Brian Bourne is a city council member for the City of Lincoln and a board member for the Camp Far West Irrigation District – a multi-county agency that covers the Counties of Placer and Yuba. The City is located within Placer County. Brian may complete one expanded statement to disclose all reportable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

Part 2. Jurisdiction of Office

- Check the box indicating the jurisdiction of your agency and, if applicable, identify the jurisdiction. Judges, judicial candidates, and court commissioners have statewide jurisdiction. All other filers should review the Reference Pamphlet, page 14, to determine their jurisdiction.
- If your agency is a multi-county office, list each county in which your agency has jurisdiction.
- If your agency is not a state office, court, county office, city office, or multi-county office (e.g., school districts, special districts and JPAs), check the "other" box and enter the county or city in which the agency has jurisdiction.

Example:

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


1. Office, Agency, or Court

Agency Name (Do not use acronyms)
Feather River Irrigation District

Division, Board, Department, District, if applicable: N/A
Your Position: Board Member

▶ If filing for multiple positions, list below or on an attachment. (Do not use acronyms)
Agency: N/A
Position:

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

☐ State
☒ Multi-County: Yuba & Sutter Counties
☐ City of
☐ Judge or Court Commissioner (Statewide Jurisdiction)
☐ County of
☐ Other

Part 3. Type of Statement

Check at least one box. The period covered by a statement is determined by the type of statement you are filing. If you are completing a 2025 annual statement, **do not** change the pre-printed dates to reflect 2026. Your annual statement is used for reporting the **previous year's** economic interests. Economic interests for your annual filing covering January 1, 2026, through December 31, 2026, will be disclosed on your statement filed in 2027. See Reference Pamphlet, page 4.

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

Part 4. Schedule Summary

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

Part 5. Verification

Complete the verification by signing the statement and entering the date signed. Each statement must have an original "wet" signature unless filed with a secure electronic signature. (See page 4 above.) All statements must be signed under penalty of perjury and be verified by the filer pursuant to Government Code Section 81004. See Regulation 18723.1(c) for filing instructions for copies of expanded statements. **When you sign your statement, you are stating, under penalty of perjury, that it is true and correct.** Only the filer has authority to sign the statement. An unsigned statement is not considered filed and you may be subject to late filing penalties.

SCHEDULE A-1
Investments
Stocks, Bonds, and Other Interests
(Ownership Interest is Less Than 10%)

Investments must be itemized.
Do not attach brokerage or financial statements.

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE
☐ $2,000 - $10,000 ☐ $10,001 - $100,000
☐ $100,001 - $1,000,000 ☐ Over $1,000,000

NATURE OF INVESTMENT
☐ Stock ☐ Other ____________ (Describe)
☐ Partnership ☐ Income Received of $0 - $499
☐ Income Received of $500 or More *(Report on Schedule C)*

IF APPLICABLE, LIST DATE:

___/___/25 ___/___/25
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE
☐ $2,000 - $10,000 ☐ $10,001 - $100,000
☐ $100,001 - $1,000,000 ☐ Over $1,000,000

NATURE OF INVESTMENT
☐ Stock ☐ Other ____________ (Describe)
☐ Partnership ☐ Income Received of $0 - $499
☐ Income Received of $500 or More *(Report on Schedule C)*

IF APPLICABLE, LIST DATE:

___/___/25 ___/___/25
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE
☐ $2,000 - $10,000 ☐ $10,001 - $100,000
☐ $100,001 - $1,000,000 ☐ Over $1,000,000

NATURE OF INVESTMENT
☐ Stock ☐ Other ____________ (Describe)
☐ Partnership ☐ Income Received of $0 - $499
☐ Income Received of $500 or More *(Report on Schedule C)*

IF APPLICABLE, LIST DATE:

___/___/25 ___/___/25
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE
☐ $2,000 - $10,000 ☐ $10,001 - $100,000
☐ $100,001 - $1,000,000 ☐ Over $1,000,000

NATURE OF INVESTMENT
☐ Stock ☐ Other ____________ (Describe)
☐ Partnership ☐ Income Received of $0 - $499
☐ Income Received of $500 or More *(Report on Schedule C)*

IF APPLICABLE, LIST DATE:

___/___/25 ___/___/25
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE
☐ $2,000 - $10,000 ☐ $10,001 - $100,000
☐ $100,001 - $1,000,000 ☐ Over $1,000,000

NATURE OF INVESTMENT
☐ Stock ☐ Other ____________ (Describe)
☐ Partnership ☐ Income Received of $0 - $499
☐ Income Received of $500 or More *(Report on Schedule C)*

IF APPLICABLE, LIST DATE:

___/___/25 ___/___/25
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE
☐ $2,000 - $10,000 ☐ $10,001 - $100,000
☐ $100,001 - $1,000,000 ☐ Over $1,000,000

NATURE OF INVESTMENT
☐ Stock ☐ Other ____________ (Describe)
☐ Partnership ☐ Income Received of $0 - $499
☐ Income Received of $500 or More *(Report on Schedule C)*

IF APPLICABLE, LIST DATE:

___/___/25 ___/___/25
ACQUIRED DISPOSED

Comments: ____________

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Instructions – Schedules A-1 and A-2
Investments

"Investment" means a financial interest in any business entity (including a consulting business or other independent contracting business) that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency's jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling $2,000 or more at any time during the reporting period. (See Reference Pamphlet, page 14.)

Reportable investments include:

- Stocks, bonds, warrants, and options, including those held in margin or brokerage accounts and managed investment funds (See Reference Pamphlet, page 14.)
- Sole proprietorships
- Your own business or your spouse's or registered domestic partner's business (See Reference Pamphlet, page 9, for the definition of "business entity.")
- Your spouse's or registered domestic partner's investments even if they are legally separate property
- Partnerships (e.g., a law firm or family farm)
- Investments in reportable business entities held in a retirement account (See Reference Pamphlet, page 16.)
- If you, your spouse or registered domestic partner, and dependent children together had a 10% or greater ownership interest in a business entity or trust (including a living trust), you must disclose investments held by the business entity or trust. (See Reference Pamphlet, page 17, for more information on disclosing trusts.)
- Business trusts

You are not required to disclose:

- Government bonds, diversified mutual funds, certain funds similar to diversified mutual funds (such as exchange traded funds) and investments held in certain retirement accounts. (See Reference Pamphlet, page 14.) (Regulation 18237)
- Bank accounts, savings accounts, money market accounts and certificates of deposits
- Cryptocurrency
- Insurance policies
- Annuities
- Commodities
- Shares in a credit union
- Government bonds (including municipal bonds)

Reminders

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

- Retirement accounts invested in non-reportable interests (e.g., insurance policies, mutual funds, or government bonds) (See Reference Pamphlet, page 16.)
- Government defined-benefit pension plans (such as CalPERS and CalSTRS plans)
- Certain interests held in a blind trust (See Reference Pamphlet, page 17.)

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

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

To Complete Schedule A-1:

Do not attach brokerage or financial statements.

- Disclose the name of the business entity. Do not use acronyms for the name of the business entity, unless it is one that is commonly understood by the public.
- Provide a general description of the business activity of the entity (e.g., pharmaceuticals, computers, automobile manufacturing, or communications).
- Check the box indicating the highest fair market value of your investment during the reporting period. If you are filing a candidate or an assuming office statement, indicate the fair market value on the filing date or the date you took office, respectively. (See page 21 for more information.)
- Identify the nature of your investment (e.g., stocks, warrants, options, or bonds).
- An acquired or disposed of date is only required if you initially acquired or entirely disposed of the investment interest during the reporting period. The date of a stock dividend reinvestment or partial disposal is not required. Generally, these dates will not apply if you are filing a candidate or an assuming office statement.

Examples:

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

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

SCHEDULE A-2
Investments, Income, and Assets of Business Entities/Trusts
(Ownership Interest is 10% or Greater)

CALIFORNIA FORM **700**
FAIR POLITICAL PRACTICES COMMISSION
Name

▶ 1. BUSINESS ENTITY OR TRUST

Name

Address *(Business Address Acceptable)*

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

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE
☐ $0 - $1,999
☐ $2,000 - $10,000
☐ $10,001 - $100,000
☐ $100,001 - $1,000,000
☐ Over $1,000,000

IF APPLICABLE, LIST DATE:
__/__/25 ACQUIRED
__/__/25 DISPOSED

NATURE OF INVESTMENT
☐ Partnership ☐ Sole Proprietorship ☐ _____ Other

YOUR BUSINESS POSITION _____

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

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

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

☐ None or ☐ Names listed below

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

Check one box:
☐ INVESTMENT ☐ REAL PROPERTY

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

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

FAIR MARKET VALUE
☐ $2,000 - $10,000
☐ $10,001 - $100,000
☐ $100,001 - $1,000,000
☐ Over $1,000,000

IF APPLICABLE, LIST DATE:
__/__/25 ACQUIRED
__/__/25 DISPOSED

NATURE OF INTEREST
☐ Property Ownership/Deed of Trust ☐ Stock ☐ Partnership
☐ Leasehold _____ Yrs. remaining ☐ Other _____

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

---

▶ 1. BUSINESS ENTITY OR TRUST

Name

Address *(Business Address Acceptable)*

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

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE
☐ $0 - $1,999
☐ $2,000 - $10,000
☐ $10,001 - $100,000
☐ $100,001 - $1,000,000
☐ Over $1,000,000

IF APPLICABLE, LIST DATE:
__/__/25 ACQUIRED
__/__/25 DISPOSED

NATURE OF INVESTMENT
☐ Partnership ☐ Sole Proprietorship ☐ _____ Other

YOUR BUSINESS POSITION _____

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

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

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

☐ None or ☐ Names listed below

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

Check one box:
☐ INVESTMENT ☐ REAL PROPERTY

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

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

FAIR MARKET VALUE
☐ $2,000 - $10,000
☐ $10,001 - $100,000
☐ $100,001 - $1,000,000
☐ Over $1,000,000

IF APPLICABLE, LIST DATE:
__/__/25 ACQUIRED
__/__/25 DISPOSED

NATURE OF INTEREST
☐ Property Ownership/Deed of Trust ☐ Stock ☐ Partnership
☐ Leasehold _____ Yrs. remaining ☐ Other _____

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

Comments: _____

Instructions – Schedule A-2
Investments, Income, and Assets of Business Entities/Trusts

Use Schedule A-2 to report investments in a business entity (including a consulting business or other independent contracting business) or trust (including a living trust) in which you, your spouse or registered domestic partner, and your dependent children, together or separately, had a 10% or greater interest, totaling $2,000 or more, during the reporting period and which is located in, doing business in, planning to do business in, or which has done business during the previous two years in your agency's jurisdiction. (See Reference Pamphlet, page 14.) A trust located outside your agency's jurisdiction is reportable if it holds assets that are located in or doing business in the jurisdiction. Do not report a trust that contains non-reportable interests. For example, a trust containing only your personal residence not used in whole or in part as a business, your savings account, and some municipal bonds, is not reportable.

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

To Complete Schedule A-2:

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

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

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

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

- Disclose each source of income and outstanding loan **to the business entity or trust** identified in Part 1 if your pro rata share of the **gross** income (including your community property interest in your spouse's or registered domestic partner's share) to the business entity or trust from that source was $10,000 or more during the reporting period. (See Reference Pamphlet, page 12, for examples.) Income from governmental sources may be reportable if not considered salary. See Regulation 18232. Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.
- Disclose each individual or entity that was a source of commission income of $10,000 or more during the reporting period through the business entity identified in Part 1. (See Reference Pamphlet, page 9.)

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

Mark "None" if you do not have any reportable $10,000 sources of income to disclose. Phrases such as "various clients" or "not disclosing sources pursuant to attorney-client privilege" are not adequate disclosure. (See Reference Pamphlet, page 15, for information on procedures to request an exemption from disclosing privileged information.)

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

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

CALIFORNIA FORM **700**
FAIR POLITICAL PRACTICES COMMISSION

Name

SCHEDULE B
Interests in Real Property
(Including Rental Income)

► ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

CITY

FAIR MARKET VALUE
- ☐ $2,000 - $10,000
- ☐ $10,001 - $100,000
- ☐ $100,001 - $1,000,000
- ☐ Over $1,000,000

IF APPLICABLE, LIST DATE:
__/__/25 ACQUIRED __/__/25 DISPOSED

NATURE OF INTEREST
- ☐ Ownership/Deed of Trust
- ☐ Easement
- ☐ Leasehold _____ Yrs. remaining
- ☐ _____ Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED
- ☐ $0 - $499
- ☐ $500 - $1,000
- ☐ $1,001 - $10,000
- ☐ $10,001 - $100,000
- ☐ OVER $100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of $10,000 or more.
- ☐ None

► ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

CITY

FAIR MARKET VALUE
- ☐ $2,000 - $10,000
- ☐ $10,001 - $100,000
- ☐ $100,001 - $1,000,000
- ☐ Over $1,000,000

IF APPLICABLE, LIST DATE:
__/__/25 ACQUIRED __/__/25 DISPOSED

NATURE OF INTEREST
- ☐ Ownership/Deed of Trust
- ☐ Easement
- ☐ Leasehold _____ Yrs. remaining
- ☐ _____ Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED
- ☐ $0 - $499
- ☐ $500 - $1,000
- ☐ $1,001 - $10,000
- ☐ $10,001 - $100,000
- ☐ OVER $100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of $10,000 or more.
- ☐ None

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

NAME OF LENDER*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE TERM (Months/Years)

_____% ☐ None

HIGHEST BALANCE DURING REPORTING PERIOD
- ☐ $500 - $1,000
- ☐ $1,001 - $10,000
- ☐ $10,001 - $100,000
- ☐ OVER $100,000

☐ Guarantor, if applicable

NAME OF LENDER*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE TERM (Months/Years)

_____% ☐ None

HIGHEST BALANCE DURING REPORTING PERIOD
- ☐ $500 - $1,000
- ☐ $1,001 - $10,000
- ☐ $10,001 - $100,000
- ☐ OVER $100,000

☐ Guarantor, if applicable

Comments: _____

Instructions – Schedule B
Interests in Real Property

Report interests in real property located in your agency's jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling $2,000 or more any time during the reporting period. Real property is also considered to be "within the jurisdiction" of a local government agency if the property or any part of it is located within two miles outside the boundaries of the jurisdiction or within two miles of any land owned or used by the local government agency. (See Reference Pamphlet, page 14.)

Interests in real property include:

- An ownership interest (including a beneficial ownership interest)
- A deed of trust, easement, or option to acquire property
- A leasehold interest (See Reference Pamphlet, page 15.)
- A mining lease
- An interest in real property held in a retirement account (See Reference Pamphlet, page 16.)
- An interest in real property held by a business entity or trust in which you, your spouse or registered domestic partner, and your dependent children together had a 10% or greater ownership interest (Report on Schedule A-2.)
- Your spouse's or registered domestic partner's interests in real property that are legally held separately by him or her

You are <u>not</u> required to report:

- A residence, such as a home or vacation cabin, used exclusively as a personal residence (However, a residence in which you rent out a room or for which you claim a business deduction may be reportable. If reportable, report the fair market value of the portion claimed as a tax deduction.)
- Some interests in real property held through a blind trust (See Reference Pamphlet, page 17.)
  - **Please note:** A non-reportable property can still be grounds for a conflict of interest and may be disqualifying.

To Complete Schedule B:

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

Reminders

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

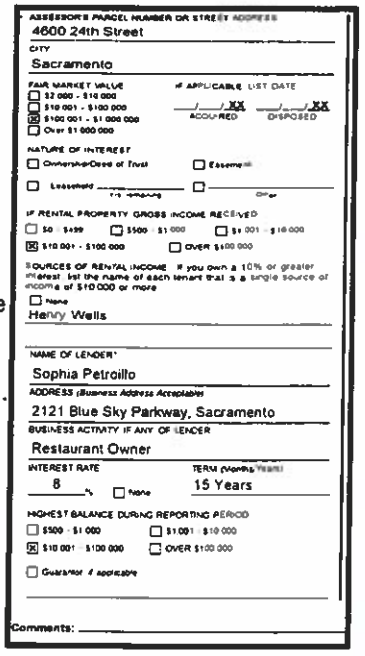
- If you received rental income, check the box indicating the gross amount you received.
- If you had a 10% or greater interest in real property and received rental income, list the name of the source(s) if your pro rata share of the gross income from any single tenant was $10,000 or more during the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

  When reporting a loan:

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

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

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


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

SCHEDULE C
Income, Loans, & Business Positions
(Other than Gifts and Travel Payments)

CALIFORNIA FORM **700**
FAIR POLITICAL PRACTICES COMMISSION

Name _____

▶ 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

YOUR BUSINESS POSITION

GROSS INCOME RECEIVED
- ☐ No Income - Business Position Only
- ☐ $500 - $1,000
- ☐ $1,001 - $10,000
- ☐ $10,001 - $100,000
- ☐ OVER $100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED
- ☐ Salary
- ☐ Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)
- ☐ Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)
- ☐ Sale of _____ *(Real property, car, boat, etc.)*
- ☐ Loan repayment
- ☐ Commission or ☐ Rental Income, *list each source of $10,000 or more*

_____ *(Describe)*

- ☐ Other _____ *(Describe)*

▶ 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

YOUR BUSINESS POSITION

GROSS INCOME RECEIVED
- ☐ No Income - Business Position Only
- ☐ $500 - $1,000
- ☐ $1,001 - $10,000
- ☐ $10,001 - $100,000
- ☐ OVER $100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED
- ☐ Salary
- ☐ Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)
- ☐ Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)
- ☐ Sale of _____ *(Real property, car, boat, etc.)*
- ☐ Loan repayment
- ☐ Commission or ☐ Rental Income, *list each source of $10,000 or more*

_____ *(Describe)*

- ☐ Other _____ *(Describe)*

▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

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

NAME OF LENDER*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF LENDER

HIGHEST BALANCE DURING REPORTING PERIOD
- ☐ $500 - $1,000
- ☐ $1,001 - $10,000
- ☐ $10,001 - $100,000
- ☐ OVER $100,000

INTEREST RATE _____% ☐ None

TERM (Months/Years) _____

SECURITY FOR LOAN
- ☐ None
- ☐ Personal residence
- ☐ Real Property _____ *Street address*

_____ *City*

- ☐ Guarantor _____
- ☐ Other _____ *(Describe)*

Comments: _____

Instructions – Schedule C
Income, Loans, & Business Positions
(Income Other Than Gifts and Travel Payments)

Reporting Income:
Report the source and amount of gross income of $500 or more you received during the reporting period. Gross income is the total amount of income before deducting expenses, losses, or taxes and includes loans other than loans from a commercial lending institution. (See Reference Pamphlet, page 12.) You must also report the source of income to your spouse or registered domestic partner if your community property share was $500 or more during the reporting period.

The source and income must be reported only if the source is located in, doing business in, planning to do business in, or has done business during the previous two years in your agency's jurisdiction. (See Reference Pamphlet, page 14.) Reportable sources of income may be further limited by your disclosure category located in your agency's conflict of interest code.

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

Commonly reportable income and loans include:
- Salary/wages, per diem, and reimbursement for expenses including travel payments provided by your employer
- Community property interest (50%) in your spouse's or registered domestic partner's income - **report the employer's name and all other required information**
- Income from investment interests, such as partnerships, reported on Schedule A-1
- Commission income not required to be reported on Schedule A-2 (See Reference Pamphlet, page 9.)
- Gross income from any sale, including the sale of a house or car (Report your pro rata share of the total sale price.)
- Rental income not required to be reported on Schedule B
- Prizes or awards not disclosed as gifts
- Payments received on loans you made to others
- An honorarium received prior to becoming a public official (See Reference Pamphlet, page 11.)
- Incentive compensation (See Reference Pamphlet, page 13.)

Reminders
- Code filers – your disclosure categories may not require disclosure of all sources of income.
- 87200 Filers – if reporting prospective employment, use attachment Form 700-P available on the FPPC's e-filing portal. Do not use Schedule C to report prospective employment.
- If you or your spouse or registered domestic partner are self-employed, report the business entity on Schedule A-2.
- Do not disclose on Schedule C income, loans, or business positions already reported on Schedules A-2 or B.

You are <u>not</u> required to report:
- Salary, reimbursement for expenses or per diem, or social security, disability, or other similar benefit payments received by you or your spouse or registered domestic partner from a federal, state, or local government agency.
- Stock dividends and income from the sale of stock unless the source can be identified.
- Income from a PERS retirement account.

(See Reference Pamphlet, page 13.)

To Complete Schedule C:

Part 1. Income Received/Business Position Disclosure
- Disclose the name and address of each source of income or each business entity with which you held a business position.
- Provide a general description of the business activity if the source is a business entity.
- Check the box indicating the amount of gross income received.
- Identify the consideration for which the income was received.
- For income from commission sales, check the box indicating the gross income received and list the name of each source of commission income of $10,000 or more. (See Reference Pamphlet, page 9.) **Note: If you receive commission income on a regular basis or have an ownership interest of 10% or more, you must disclose the business entity and the income on Schedule A-2.**
- Disclose the job title or business position, if any, that you held with the business entity, even if you did not receive income during the reporting period.

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

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name ______________________

SCHEDULE D
Income – Gifts

▶ NAME OF SOURCE *(Not an Acronym)*

____

ADDRESS *(Business Address Acceptable)*

____

BUSINESS ACTIVITY, IF ANY, OF SOURCE

____

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	$________	______________
___/___/___	$________	______________
___/___/___	$________	______________

▶ NAME OF SOURCE *(Not an Acronym)*

____

ADDRESS *(Business Address Acceptable)*

____

BUSINESS ACTIVITY, IF ANY, OF SOURCE

____

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	$________	______________
___/___/___	$________	______________
___/___/___	$________	______________

▶ NAME OF SOURCE *(Not an Acronym)*

____

ADDRESS *(Business Address Acceptable)*

____

BUSINESS ACTIVITY, IF ANY, OF SOURCE

____

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	$________	______________
___/___/___	$________	______________
___/___/___	$________	______________

▶ NAME OF SOURCE *(Not an Acronym)*

____

ADDRESS *(Business Address Acceptable)*

____

BUSINESS ACTIVITY, IF ANY, OF SOURCE

____

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	$________	______________
___/___/___	$________	______________
___/___/___	$________	______________

▶ NAME OF SOURCE *(Not an Acronym)*

____

ADDRESS *(Business Address Acceptable)*

____

BUSINESS ACTIVITY, IF ANY, OF SOURCE

____

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	$________	______________
___/___/___	$________	______________
___/___/___	$________	______________

▶ NAME OF SOURCE *(Not an Acronym)*

____

ADDRESS *(Business Address Acceptable)*

____

BUSINESS ACTIVITY, IF ANY, OF SOURCE

____

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	$________	______________
___/___/___	$________	______________
___/___/___	$________	______________

Comments: ____

Instructions – Schedule D
Income – Gifts

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

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

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

Commonly reportable gifts include:

- Tickets/passes to sporting or entertainment events
- Tickets/passes to amusement parks
- Parking passes not used for official agency business
- Food, beverages, and accommodations, including those provided in direct connection with your attendance at a convention, conference, meeting, social event, meal, or like gathering
- Rebates/discounts not made in the regular course of business to members of the public without regard to official status
- Wedding gifts (See Reference Pamphlet, page 17)
- An honorarium received prior to assuming office (You may report an honorarium as income on Schedule C, rather than as a gift on Schedule D, if you provided services of equal or greater value than the payment received. See Reference Pamphlet, page 11.)
- Transportation and lodging (See Schedule E.)
- Forgiveness of a loan received by you

Reminders

- Gifts from a single source are subject to a $630 limit for calendar years 2025 and 2026. The gift limit in calendar year 2024 was $590. (See Reference Pamphlet, page 11.)
- Code filers – you only need to report gifts from reportable sources.

You are <u>not</u> required to disclose:

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

To Complete Schedule D:

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

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name

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

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

► NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

CITY AND STATE

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

DATE(S): __/__/__ - __/__/__ *(If gift)* AMT: $____

► MUST CHECK ONE: ☐ Gift -or- ☐ Income

☐ Made a Speech/Participated in a Panel

☐ Other - Provide Description ____

► If Gift, Provide Travel Destination ____

► NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

CITY AND STATE

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

DATE(S): __/__/__ - __/__/__ *(If gift)* AMT: $____

► MUST CHECK ONE: ☐ Gift -or- ☐ Income

☐ Made a Speech/Participated in a Panel

☐ Other - Provide Description ____

► If Gift, Provide Travel Destination ____

► NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

CITY AND STATE

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

DATE(S): __/__/__ - __/__/__ *(If gift)* AMT: $____

► MUST CHECK ONE: ☐ Gift -or- ☐ Income

☐ Made a Speech/Participated in a Panel

☐ Other - Provide Description ____

► If Gift, Provide Travel Destination ____

► NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

CITY AND STATE

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

DATE(S): __/__/__ - __/__/__ *(If gift)* AMT: $____

► MUST CHECK ONE: ☐ Gift -or- ☐ Income

☐ Made a Speech/Participated in a Panel

☐ Other - Provide Description ____

► If Gift, Provide Travel Destination ____

Comments: ____

Instructions – Schedule E
Travel Payments, Advances, and Reimbursements

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

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

You are <u>not</u> required to disclose:

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

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

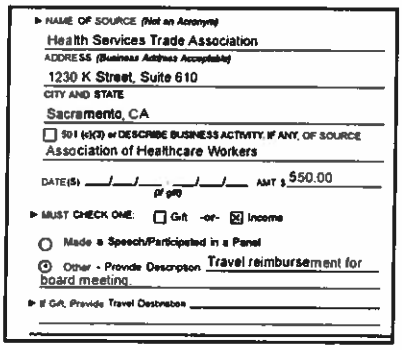
To Complete Schedule E:

- Disclose the full name (not an acronym) and address of the source of the travel payment.
- Identify the business activity if the source is a business entity.
- Check the box to identify the payment as a gift or income, report the amount, and disclose the date(s).
  - **Travel payments are gifts** if you did not provide services that were equal to or greater in value than the payments received. You must disclose gifts totaling $50 or more from a single source during the period covered by the statement.

    When reporting travel payments that are gifts, you must provide a description of the gift, the **date(s)** received, and the **travel destination.**
  - **Travel payments are income** if you provided services that were equal to or greater in value than the payments received. You must disclose income totaling $500 or more from a single source during the period covered by the statement. You have the burden of proving the payments are income rather than gifts. When reporting travel payments as income, you must describe the services you provided in exchange for the payment. You are not required to disclose the date(s) for travel payments that are income.

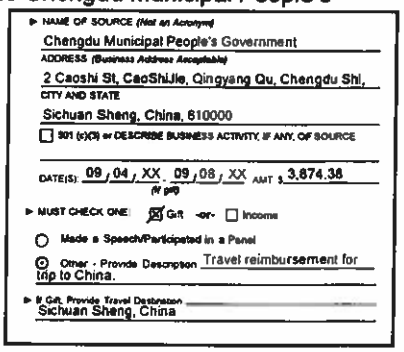
Example:

City council member MaryClaire Chandler is the chair of a 501(c)(6) trade association, and the association pays for MaryClaire's travel to attend its meetings. Because MaryClaire is deemed to be providing equal or greater consideration for the travel payment by virtue of serving on the board, this payment may be reported as income. Payments for MaryClaire to attend other events for which they are not providing services are likely considered gifts. Note that the same payment from a 501(c)(3) would NOT be reportable.


▶ NAME OF SOURCE (Not an Acronym)
Health Services Trade Association
ADDRESS (Business Address Acceptable)
1230 K Street, Suite 610
CITY AND STATE
Sacramento, CA
☐ 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE
Association of Healthcare Workers
DATE(S) __/__/__ __/__/__ (If gift) AMT $ 550.00
▶ MUST CHECK ONE: ☐ Gift -or- ☒ Income
○ Made a Speech/Participated in a Panel
⊙ Other - Provide Description Travel reimbursement for board meeting.
▶ If Gift, Provide Travel Destination

Example:

Mayor Kim travels to China on a trip organized by China Silicon Valley Business Development, a California nonprofit, 501(c)(6) organization. The Chengdu Municipal People's Government pays for Mayor Kim's airfare and travel costs, as well as meals and lodging during the trip. The trip's agenda shows that the trip's purpose is to promote job creation and economic activity in China and in Silicon Valley, so the trip is reasonably related to a governmental purpose. Thus, Mayor Kim must report the gift of travel, but the gift is exempt from the gift limit. In this case, the travel payments are not subject to the gift limit because the source is a foreign government and because the travel is reasonably related to a governmental purpose. (Section 89506(a)(2).) Note that Mayor Kim could be disqualified from participating in or making decisions about The Chengdu Municipal People's Government for 12 months. Also note that if China Silicon Valley Business Development (a 501(c)(6) organization) paid for the travel costs rather than the governmental organization, the payments would be subject to the gift limits. (See the FPPC fact sheet, Limitations and Restrictions on Gifts, Honoraria, Travel and Loans, at www.fppc.ca.gov.)


▶ NAME OF SOURCE (Not an Acronym)
Chengdu Municipal People's Government
ADDRESS (Business Address Acceptable)
2 Caoshi St, CaoShiJie, Qingyang Qu, Chengdu Shi,
CITY AND STATE
Sichuan Sheng, China, 610000
☐ 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE
DATE(S) 09/04/XX 09/08/XX (If gift) AMT $ 3,674.38
▶ MUST CHECK ONE: ☒ Gift -or- ☐ Income
○ Made a Speech/Participated in a Panel
⊙ Other - Provide Description Travel reimbursement for trip to China.
▶ If Gift, Provide Travel Destination Sichuan Sheng, China

Restrictions and Prohibitions

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

Gift Prohibition

Gifts received by most state and local officials, employees, and candidates are subject to a limit. In 2025-2026, the gift limit increased to $630 from a single source during a calendar year. The gift limit in calendar year 2024 was $590.

Additionally, state officials, state candidates, and certain state employees are subject to a $10 limit per calendar month on gifts from lobbyists and lobbying firms registered with the Secretary of State. See Reference Pamphlet, page 11.

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

Disqualification

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

Honorarium Ban

Most state and local officials, employees, and candidates are prohibited from accepting an honorarium for any speech given, article published, or attendance at a conference, convention, meeting, or like gathering. (See Reference Pamphlet, page 11.)

Loan Restrictions

Certain state and local officials are subject to restrictions on loans. (See Reference Pamphlet, page 15.)

Post-Governmental Employment

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

Late Filing

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

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

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

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

Form 700 is a Public Document Public Access Must Be Provided

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

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

Questions and Answers

General

Q. What is the reporting period for disclosing interests on an assuming office statement or a candidate statement?

A. On an assuming office statement, disclose all reportable investments, interests in real property, and business positions held on the date you assumed office. In addition, you must disclose income (including loans, gifts and travel payments) received during the 12 months prior to the date you assumed office.

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

Q. I hold two other board positions in addition to my position with the county. Must I file three statements of economic interests?

A. Yes, three are required. However, you may instead complete an expanded statement listing the county and the two boards on the Cover Page or an attachment as the agencies for which you will be filing. Disclose all reportable economic interests in all three jurisdictions on the expanded statement. File the expanded statement for your primary position providing an original "wet" signature unless filed with a secure electronic signature. (See page 4 above.) File copies of the expanded statement with the other two agencies as required by Regulation 18723.1(c). Remember to complete separate statements for positions that you leave or assume during the year.

Q. I am a department head who recently began acting as city manager. Should I file as the city manager?

A. Yes. File an assuming office statement as city manager. Persons serving as "acting," "interim," or "alternate" must file as if they hold the position because they are or may be performing the duties of the position.

Q. My spouse and I are currently separated and in the process of obtaining a divorce. Must I still report my spouse's income, investments, and interests in real property?

A. Yes. A public official must continue to report a spouse's economic interests until such time as dissolution of marriage proceedings is final. However, if a separate property agreement has been reached prior to that time, your estranged spouse's income may not have to be reported. Contact the FPPC for more information.

Q. As a designated employee, I left one state agency to work for another state agency. Must I file a leaving office statement?

A. Yes. You may also need to file an assuming office statement for the new agency.

Investment Disclosure

Q. I have an investment interest in shares of stock in a company that does not have an office in my jurisdiction. Must I still disclose my investment interest in this company?

A. Probably. The definition of "doing business in the jurisdiction" is not limited to whether the business has an office or physical location in your jurisdiction. (See Reference Pamphlet, page 14.)

Q. My spouse and I have a living trust. The trust holds rental property in my jurisdiction, our primary residence, and investments in diversified mutual funds. I have full disclosure. How is this trust disclosed?

A. Disclose the name of the trust, the rental property and its income on Schedule A-2. Your primary residence and investments in diversified mutual funds registered with the SEC are not reportable.

Q. I am required to report all investments. I have an IRA that contains stocks through an account managed by a brokerage firm. Must I disclose these stocks even though they are held in an IRA and I did not decide which stocks to purchase?

A. Yes. Disclose on Schedule A-1 or A-2 any stock worth $2,000 or more in a business entity located in or doing business in your jurisdiction.

Q. The value of my stock changed during the reporting period. How do I report the value of the stock?

A. You are required to report the highest value that the stock reached during the reporting period. You may use your monthly statements to determine the highest value. You may also use the entity's website to determine the highest value. You are encouraged to keep a record of where you found the reported value. Note that for an assuming office statement, you must report the value of the stock on the date you assumed office.

Q. I am the sole owner of my business, an S-Corporation. I believe that the nature of the business is such that it cannot be said to have any "fair market value" because it has no assets. I operate the corporation under an agreement with a large insurance company. My contract does not have resale value because of its nature as a personal services contract. Must I report the fair market value for my business on Schedule A-2 of the Form 700?

A. Yes. Even if there are no *tangible* assets, intangible assets, such as relationships with companies and clients are commonly sold to qualified professionals. The "fair market value" is often quantified for other purposes, such as marital dissolutions or estate planning. In addition, the IRS presumes that "personal services corporations" have a fair market value. A professional "book of business" and the associated goodwill that generates income are not without a determinable value. The Form 700 does not require a precise fair market value; it is only necessary to check a box indicating the broad range within which the value falls.

Q. I own stock in IBM and must report this investment on Schedule A-1. I initially purchased this stock in the early 1990s; however, I am constantly buying and selling shares. Must I note these dates in the "Acquired" and "Disposed" fields?

A. No. You must only report dates in the "Acquired" or "Disposed" fields when, during the reporting period, you initially purchase a reportable investment worth $2,000 or more or when you dispose of the entire investment. You are not required to track the partial trading of an investment.

Q. On last year's filing I reported stock in Encoe valued at $2,000 - $10,000. Late last year the value of this stock fell below and remains at less than $2,000. How should this be reported on this year's statement?

A. You are not required to report an investment if the value was less than $2,000 during the entire reporting period. However, because a disposed date is not required for stocks that fall below $2,000, you may want to report the stock and note in the "comments" section that the value fell below $2,000. This would be for informational purposes only; it is not a requirement.

Q. We have a Section 529 account set up to save money for our son's college education. Is this reportable?

A. If the Section 529 account contains reportable interests (e.g., common stock valued at $2,000 or more), those interests are reportable (not the actual Section 529 account). If the account contains solely mutual funds, then nothing is reported.

Income Disclosure

Q. I reported a business entity on Schedule A-2. Clients of my business are located in several states. Must I report all clients from whom my pro rata share of income is $10,000 or more on Schedule A-2, Part 3?

A. No, only the clients located in or doing business on a regular basis in your jurisdiction must be disclosed.

Q. I believe I am not required to disclose the names of clients from whom my pro rata share of income is $10,000 or more on Schedule A-2 because of their right to privacy. Is there an exception for reporting clients' names?

A. Regulation 18740 provides a procedure for requesting an exemption to allow a client's name not to be disclosed if disclosure of the name would violate a legally recognized privilege under California or Federal law. This regulation may be obtained from our website at *www.fppc.ca.gov.* (See Reference Pamphlet, page 15.)

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

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

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

A. Sources of income to a business in which you have an ownership interest of 10% or greater are disclosed on Schedule A-2. (See Reference Pamphlet, page 9.)

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

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

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

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

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

A. If your patients exercise sufficient control by selecting you instead of other doctors, then your patients, rather than their insurance carriers, are sources of income to you. (See Reference Pamphlet, page 15.)

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

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

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

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

Real Property Disclosure

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

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

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

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

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

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

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

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

Gift Disclosure

Q. If I received a reportable gift of two tickets to a concert valued at $100 each, but gave the tickets to a friend because I could not attend the concert, do I have any reporting obligations?

A. Yes. Since you accepted the gift and exercised discretion and control of the use of the tickets, you must disclose the gift on Schedule D.

Q. Julia and Jared Benson, a married couple, want to give a piece of artwork to a county supervisor. Is each spouse considered a separate source for purposes of the gift limit and disclosure?

A. Yes, each spouse may make a gift valued at the gift limit during a calendar year. For example, during 2025 the gift limit was $630, so the Bensons may have given the supervisor artwork valued at no more than $1,260. The supervisor must identify Jared and Julia Benson as the sources of the gift.

Q. I am a Form 700 filer with full disclosure. Our agency holds a holiday raffle to raise funds for a local charity. I bought $10 worth of raffle tickets and won a gift basket valued at $120. The gift basket was donated by Doug Brewer, a citizen in our city. At the same event, I bought raffle tickets for, and won a quilt valued at $70. The quilt was donated by a coworker. Are these reportable gifts?

A. Because the gift basket was donated by an outside source (not an agency employee), you have received a reportable gift valued at $110 (the value of the basket less the consideration paid). The source of the gift is Doug Brewer and the agency is disclosed as the intermediary. Because the quilt was donated by an employee of your agency, it is not a reportable gift.

Q. My agency is responsible for disbursing grants. An applicant (501(c)(3) organization) met with agency employees to present its application. At this meeting, the applicant provided food and beverages. Would the food and beverages be considered gifts to the employees? These employees are designated in our agency's conflict of interest code and the applicant is a reportable source of income under the code.

A. Yes. If the value of the food and beverages consumed by any one filer, plus any other gifts received from the same source during the reporting period total $50 or more, the food and beverages would be reported using the fair market value and would be subject to the gift limit.

Q. I received free admission to an educational conference related to my official duties. Part of the conference fees included a round of golf. Is the value of the golf considered informational material?

A. No. The value of personal benefits, such as golf, attendance at a concert, or sporting event, are gifts subject to reporting and limits.

BEL MARIN KEYS COMMUNITY SERVICES DISTRICT

EMPLOYEE HANDBOOK

REVISED: ~~**FEBRUARY 16, 2023**~~
January 2026

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BEL MARIN KEYS COMMUNITY SERVICES DISTRICT

INTRODUCTION:

This Handbook is intended to provide information regarding the Bel Marin Keys Community Services District's (BMKCSD or District) general employment policies and procedures only, and does not attempt to provide a complete description of your employment relationship with the BMKCSD. In addition, circumstances will obviously require that policies and benefits described in the Handbook to change from time to time. Employees will be advised in writing of changes that occur. None of these policies or procedures can be amended or changed in any way by oral statements, but can be changed only in writing by the BMKCSD Board of Directors (BOARD). This Handbook is intended to apply to all employees of the BMKCSD. The BMKCSD's office is located at 4 Montego Key, Novato, CA 94949. All employees will report to this location, but will perform their duties within the district's jurisdiction and beyond as ~~called upon~~assigned. This Handbook supersedes all previous handbooks and policies within the District. Separate from this Handbook, the District has Standard Operating Procedures (SOPs) and other policies relating to administrative and operational matters.

EQUAL EMPLOYMENT OPPORTUNITY:

The District believes that all persons are entitled to equal employment opportunity and does not discriminate against qualified employees or applicants because of race, color, religion, sex, pregnancy, national origin, ancestry, citizenship, age, marital status, physical disability, mental disability, medical condition, sexual orientation, gender, gender identity, gender expression, genetic information, military and veteran status, reproductive health decision-making, or any other characteristic protected by federal, state, or local law. Equal employment opportunity will be extended to all persons in all aspects of the employer-employee relationship, including recruitment, hiring, upgrading, training, promotion, transfer, discipline, layoff, recall and termination. In addition, we support the goals of the Americans with Disabilities Act (ADA) in hiring, accommodating, promoting and retaining qualified employees with disabilities. BMKCSD shall not require, as a condition of employment, continued employment, or a benefit of employment, the disclosure of information relating to an applicant's or employee's reproductive health decision-making. Additionally, BMKCSD will provide registered domestic partners with all rights and benefits as required by law.

IMMIGRATION LAW COMPLIANCE:

BMKCSD ~~is committed to~~ will employ~~ing~~ only United States citizens and aliens who are authorized to work in the United States and does not unlawfully discriminate on the basis of citizenship or national origin. In compliance with the Immigration Reform and Control Act of 1986, each new employee, as a condition of employment, must complete the Employment Eligibility Verification Form I-9, and present documentation establishing identity and employment eligibility. Former employees who are rehired must also complete the form if they have not completed an I-9 with BMKCSD within the past three years, or if their previous I-9 is no longer retained or valid.

EMPLOYMENT-AT-WILL:

Your employment relationship with BMKCSD is at will. You are free to resign at any time, with or without a reason. BMKCSD has the same right as you, and can terminate your employment at any time, either with or without cause or advance notice. Also, there is no promise of employment for a specific period of time and no agreement that employment will be ended under particular circumstances. Nothing in this handbook or in any document changes this at-will policy or creates an expectation of permanent employment.

There are no oral or implied contracts for continued or long-term employment at the BMKCSD. The BOARD reserves the right to change, modify, or delete any part of this Handbook at any time.

OUTSIDE EMPLOYMENT:

Employees may hold outside jobs only as long as they continue to meet the performance standards of their job with BMKCSD. All employees will be judged by the same performance standards and will be subject to BMKCSD's scheduling demands, regardless of any existing outside work requirements. An employee who wants to hold an outside job must submit a written request to the District Manager. If BMKCSD determines that an employee's outside work interferes with the performance standards of their job, the employee may be asked to terminate the outside employment, if the employee wishes to remain with BMKCSD. Outside employment that constitutes a conflict of interest is prohibited.

EMPLOYMENT POLICIES:

The District recognizes that most employees are concerned with their potential and future with the BMKCSD. In recognition of these concerns, basic policies are being explained ~~which~~ that will influence employment. The District believes in the recognition of your contributions. For that reason, we consider your individual job performance as the single most important factor in decisions affecting salary adjustment, promotions, and job retention. The District also believes that, whenever possible, promotions should be made from within the BMKCSD's ~~employ~~ employees ~~ment pool~~. The Board recognizes that the work of the District is to be performed by the District's employees and not by Board members serving as volunteers.

ACCESS TO PERSONNEL FILES:

BMKCSD maintains a personnel file on each employee securely locked. The personnel files include such information as the employee's job application, resume, records of training, documentation of performance appraisals and salary increases, and other employment records. Upon submission of a written request, District employees may review their own personnel files in our offices and in the presence of an individual appointed by BMKCSD to maintain the files.

INTRODUCTORY PERIOD:

The first 90 days of employment at BMKCSD are treated as an ~~introductory~~ Probationary period. The ~~introductory~~ Probationary period is intended to give new employees the opportunity to demonstrate their ability to achieve a satisfactory level of performance and to determine whether the new position meets ~~their~~ our expectations. BMKCSD uses this period to evaluate employee capabilities, work habits, and overall performance. At the conclusion of the ~~introductory~~ Probationary period, ~~new employees' supervisor or~~ the District Manager will provide new employees with a review of their performance to date.

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During the ~~Introductory~~ Probationary ~~90 day~~ period, any significant absence will automatically extend the introductory period by the length of the absence. If the District Manager determines that the designated introductory period does not allow sufficient time to thoroughly evaluate the employee's performance, the introductory period may be extended for a specified period. During this period, BMKCSD and the employee will have an opportunity to determine whether further employment with BMKCSD is appropriate. During the ~~introductory~~ Probationary period, new employees are eligible for those benefits that are required by law, such as workers' compensation insurance and Social Security. After completion of the introductory period, they may also be eligible for other BMKCSD provided benefits, subject to the terms and conditions of each benefits program.

MEAL AND REST PERIODS:

The BMKCSD authorizes and permits non-exempt employees who work at least three and one-half (3.5) hours in a workday to take paid rest periods, which ~~insofar as practicable~~ shall be in the middle of each work period and during which they will be completely relieved of all duty. The authorized rest periods shall be based on the total hours worked daily at the rate of ~~ten (10)~~ 15 (15) minutes of rest time per four (4) hours or major fraction thereof worked, as indicated in the following chart:

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Hours Worked in the Workday	Number of ~~Ten~~ Fifteen (~~10~~)(15) Minute Periods
3.5 to 6 hours	1
More than 6 to 10 hours	2
More than 10 to 14 hours	3
More than 14 to 18 hours	4
More than 18 to 22 hours	5
More than 22 to 24 hours	6

Rest periods may not be added to meal periods to extend the time, nor used to make up for tardiness or leaving work early.

*Exempt employees are not entitled to rest breaks under California law. However, they may still benefit from taking rest breaks to maintain their energy levels and productivity.

Non-exempt employees who work more than five (5) hours in a workday are also provided an uninterrupted 30 minute unpaid meal period each day. During this meal period, employees are completely relieved of their work duties and the BMKCSD relinquishes control over the employees' activities.

*Exempt employees are also entitled to a 30 minute meal break if they work more than five hours in a workday. However, they are not required to take their ~~mela~~ meal break before the end of the fifth hour. They may choose to waive their meal break altogether.

An employee's meal period must commence before the end of the fifth hour of the employee's shift, unless six (6) hours will complete the workday. If six (6) hours will complete the day, then the meal period may be waived by mutual consent of the BMKCSD and the employee. An employee working more than 10 hours is provided a second unpaid, off-duty meal period of 30 minutes unless 12 hours will complete the workday. If 12 hours will complete the day, then the second meal period may be waived by mutual consent of the BMKCSD and the employee, only if the first meal period was not waived. The second meal period must commence no later than before the end of the tenth hour of work.

The BMKCSD will permit employees a reasonable opportunity to take their meal and rest periods and will do nothing to impede or discourage employees from taking their meal and rest periods. Employees may leave the premises during their meal and rest periods, and are not "on call" during their meal and rest periods. Employees are not required to check email, voicemail, or any work-related devices (cell phones, etc.) during their meal or rest period. If employees believe they have

been impeded from taking their meal and rest periods, they must notify their supervisor or the District Manager immediately so the matter may be properly addressed.

LACTATION ACCOMMODATION:

The BMKCSD provides a reasonable amount of break time to accommodate an employee desiring to express breast milk for their child. The break time shall, if possible, run concurrently with any break time already provided to the employee. Break time for a non-exempt employee that does not run concurrently with the 10-minute paid rest periods with which they are already provided shall be unpaid.

The BMKCSD will provide employees with the use of a room or location to express milk in private. This room or location may be where the employee normally works. The room or location will:

1. not be a bathroom;
2. be in close proximity to the employee's work area;
3. be shielded from view;
4. be free from intrusion while the employee is expressing milk;
5. be safe, clean, and free of toxic or hazardous materials;
6. contain a surface to place a breast pump and personal items;
7. contain a place to sit; and
8. have access to electricity or alternative devices including, but not limited to, extension cords or charging stations, needed to operate an electric or battery-powered breast pump.

The BMKCSD will also provide access to a sink with running water and a refrigerator or cooling device suitable for storing milk in close proximity to the employee's workspace. The use of the room for lactation shall take precedence over other uses, but only for the time it is in use for lactation purposes.

If an employee desires a lactation accommodation, the employee must submit a request to the District Manager. If the BMKCSD is unable to provide break time or a location to express milk, the BMKCSD will provide a written response to the employee's request.

ATTENDANCE:

Regular attendance at work is important. Being at work on time will assure you of a full paycheck and will influence your evaluation. Unexcused absences place an unfair burden on other employees, and affect your overall performance. You are expected to be at work each scheduled day unless excused by the District Manager. Otherwise, an absence is unexcused.

The District realizes that due to illness or other compelling reasons, it may be necessary for you to be absent on occasion. If this happens, you are required to notify the District Manager as soon as possible. This shall be done by calling 415-883-4222, texting the District Manager's Cellphone 415-996-3907 or by email. If it is impossible for you to notify the office of your absence, a member of your family or a friend may do so for you. The BMKCSD reserves the right in the cases of illness to require certification of a licensed physician to verify the reason given for an absence of any duration. The District Manager is required to notify the Board of Director's President.

Employees are required to submit any request in writing to the District Manager for time off seven (7) days prior to the time requested. In the event an employee is unable to submit the written request for an absence prior to the absence, such written explanation is to be submitted on the first day of the employee's return to work. Please note that if you are absent, and fail to notify the District Manager, the District may treat your absence as abandonment of your job and resignation of your

position. The District Manager is required to submit any request in writing to the Board of Director's President for time off seven (7) days prior to the time requested.

CSD will not ask about the reason for the requested time off.

TARDINESS:
When employees are late for work, this creates a burden on co-workers. If you are unable to report for work at your scheduled starting time, it is required that you notify the District Manager as soon as you become aware you will be late. If you are late for work, check in immediately with the District Manager. Tardiness is noted in your personnel file and records. These are reviewed periodically and, of course, are a factor in determining pay increases and promotions. Tardiness may also result in disciplinary action up to and including termination.

ABOUT YOUR PAY:
Your compensation arrangement will be reviewed regularly, generally at least once a year. The first review may occur at the end of your introductory period. For non-exempt employees, your initiative, performance, and attendance will be evaluated by the District Manager, and represent the primary factors in determining whether you are eligible for a pay adjustment. Salary employees will be reviewed annually on Anniversary date.

PAYDAYS:
Employees are normally paid every two weeks. Your check will not be released to any other individual without your written authorization. This is for your protection. Accordingly, if you are not at work on a payday, we will hold your check until you can pick it up. Upon termination or resignation, employees will be paid all amounts due in accordance with the applicable laws. Terminated employees will be paid at the time of termination, and should present themselves to the ~~District Manager~~CSD to receive their final check.

PAY DEDUCTIONS:
The law requires that BMKCSD make certain deductions from every employee's compensation. Among these are applicable federal and State income taxes, and State Disability Insurance.

*Exempt employees – OSHERA and Simple IRA will be deducted from your check *

HOURS OF WORK:
Normal operating hours are ~~9:00~~ 8:00 a.m. to ~~5:00~~ 4:00 p.m. Your supervisor or the District Manager will advise you if your hours must deviate from the above.

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OVERTIME:
The District Manager and Waterways Maintenance Manager ~~is~~ are an exempt employees who ~~is~~ are not entitled to overtime under state and federal law. Non-exempt employees will be required to work overtime as necessary. For purposes of determining which hours constitute overtime, only actual hours worked in a given workday or workweek will be counted. All overtime work must be previously authorized by a prior written authorization of the District Manager, or oral approval if the District ~~manager~~ Manager is not in the District office, to be confirmed in writing at the earliest opportunity. You may not perform overtime work unless you are specifically authorized to do so. BMKCSD provides compensation for all overtime hours worked by a non-exempt employee in accordance with State and federal laws as follows:

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1.5 times the employee's regular rate of pay for hours worked in excess of eight (8) per day, 40 per week, or during the first eight (8) hours on the seventh (7th) consecutive day worked in a work

week, and double time for hours worked after 12 in one (1) day or after eight (8) hours on the seventh (7th) consecutive day worked in the work week.

If a BMKCSD-recognized holiday occurs during a week you worked overtime, the holiday will be treated as an eight (8) hour workday for purposes of computing the number of hours you worked that week.

TIME CARDS:

Adherence to the established timecard procedure will ensure that employees receive all monies due for time worked in compliance with state and federal laws.

All non-exempt employees are required by the BMKCSD to prepare timecards indicating hours worked and absences during each pay period. All Exempt employees are required by the BMKCSD to prepare timecards indicating hours worked and absences during each pay period. Notating the hours spent for Operations, Measure A, Measure D and Measure G. All timecards are to be filled in on a daily basis in the Google Workbook. Timecards shall not reflect an automatic listing of scheduled hours, but must reflect actual hours worked, regardless of whether or not actual hours are the same as scheduled hours. Rest periods are with pay and are not recorded on the employee's timecard. Meal periods are without pay and accordingly the start and end times of meal periods should be recorded on the employee's timecard.

Timecards are official BMKCSD documents. Falsifying or altering timecards or completing the time card of another employee are grounds for disciplinary action, up to and including termination.

The timecard should reflect all missed time from work and the reason (i.e., paid sick leave, vacation, unexcused absence, etc.).

No "corrections" of original timecard entries are permitted on ~~time cards~~timecards without a supervisor or the District Manager's approval. Each employee must sign the timecard in ink, at the END of the pay period, and then submit it to their supervisor or the District Manager for approval. The supervisor or the District Manager should sign the card indicating approval after verifying the accuracy of the card. The supervisor or the District Manager ~~shall forward the timecard to the Payroll Department in a timely manner.~~ Will verify each timesheet in the Google Workbook and submit on the BMK Payroll Authorization form to Paycheck with the Board of Director's President's initials.

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MAKE-UP TIME:

BMKCSD allows the use of make-up time when non-exempt employees need time off to tend to personal obligations. Employees may take time off and then make up the time later in the same workweek, or may work extra hours earlier in the workweek to make up for time that will be taken off later in the workweek. Makeup time worked will not be paid at an overtime rate.

Make-up time requests must be submitted in writing to your supervisor or the District Manager with your signature. Requests will be considered for approval based on the legitimate business needs of BMKCSD at the time the request is submitted. A separate written request is required for each occasion you request make-up time. Your make-up time request must be approved in writing before you take the requested time off or work make-up time, whichever is first. Use of make-up time is completely voluntary. BMKCSD does not encourage, discourage or solicit the use of make-up time.

OFF-THE CLOCK WORK:

It is BMKCSD policy to pay employees for all work performed by its employees. It is a violation of BMKCSD policy for any supervisor or the District Manager to (1) instruct any non-exempt (hourly) employee to perform any work off-the-clock, (2) suggest to non-exempt employees that performing work for the BMKCSD without compensation is acceptable, or (3) adjust any non-exempt employee's time records to deny them compensation for time worked.

In addition, it is also a violation of BMKCSD policy for non-exempt employees to work off-the-clock for any reason.

Occasional overtime may be required. However, all overtime requires prior approval by a supervisor or the District Manager. It is never acceptable for a non-exempt employee to work off-the-clock in order to avoid working overtime.

Any employee who believes they have been instructed to work off-the-clock or for whatever reason has performed work for which the employee has not been paid, should report it to the employee's supervisor, the District Manager. If the employee has been instructed to work off-the-clock by the District Manager, the employee can report that concern to the District's Board President. It is the duty of any supervisor or the District Manager who is aware that off-the-clock work is taking place to make the employee aware that the employee must either clock in or stop performing work-related tasks. The incident must be reported to the employee's immediate supervisor and the District Manager to avoid future re-occurrences.

SOLICITATIONS:

In order to avoid disruption of BMKCSD operation, employees may not solicit during working time. Employees also may not distribute literature during working time. Non-employees may not solicit or distribute at any time on BMKCSD property. This is not applicable to BMKCSD material.

Working time includes the working time of both the employee doing the soliciting and distributing and the employee to whom the soliciting and distributing is being directed. Working time does not include rest periods, meal periods, or any other specified periods during the workday when employees are not engaged in performing their work tasks.

MANAGEMENT RIGHTS:

For the efficient and smooth operation of the BMKCSD, management reserves the right to schedule work and hours, manage the business, and direct the work force as necessary. In the event of staffing problems, employees may be temporarily transferred to other departments or given additional job responsibilities. Employees are expected to accept these alternate assignments and responsibilities within reason.

GARNISHMENTS:

Employees are expected to meet their personal financial obligations without involving the BMKCSD. Wage garnishments against an employee's pay can be a costly administrative burden for an employer.

PERSONAL DATA CHANGES:

It is the responsibility of each employee to promptly notify BMKCSD of changes in your personal data. Mailing addresses, telephone numbers, individuals to be contacted in the event of an emergency, educational accomplishments, and other such status reports should be accurate and current at all times.

PERFORMANCE EVALUATIONS:

The District Manager's performance will be reviewed annually by the Board.

Non-exempt employees will be reviewed by the District Manager once a year. At that time, the employee will receive a copy of the written performance evaluation form that has been completed by the District Manager. A copy of the form will be included in the employee's personnel file.

Your performance evaluation may review factors such as the quality and quantity of the work you perform, your knowledge of the job, your initiative, your work attitude and your attitude towards our customers and other employees. The performance evaluation should help you become aware of your progress, areas for improvement, and objectives or goals for future work performance.

After the performance review, you will be requested to sign the evaluation report simply to acknowledge that it has been presented to you, and discussed with you, and that you are aware of its contents.

Positive performance does not guarantee increases in salary or promotions. Salary increases and promotions are solely within the discretion of the District and may depend upon many factors in addition to performance.

EMPLOYMENT TERMINATIONS:

Termination of employment is an inevitable part of personnel activity within any organization. Below are examples of some of the most common circumstances under which employment is terminated:

RESIGNATION is a voluntary employment termination initiated by an employee. An employee who fails to report to work without notice to, or approval by their supervisor or the District Manager, may be considered to have voluntarily abandoned their employment.

DISCHARGE is involuntary employment termination, initiated by BMKCSD.

LAYOFF is involuntary employment termination for non-disciplinary reasons.

Since employment with BMKCSD is based on mutual consent, both the employee and BMKCSD have the right to terminate employment at will, with or without cause, at any time. Employees will receive their final pay in accordance with applicable State law.

EMPLOYEE COMMUNICATION:

On occasion, you might have a complaint, suggestion, observation, or question about your job. It is our policy to consider your complaints and suggestions. Please share any suggestions you might have about how our operations could be improved. If you have complaints about your job, co-workers or management employees, the following procedure should be followed:

First, make a genuine effort to resolve any conflict or misunderstanding by direct communication with the individual(s) with whom you are experiencing conflict or misunderstanding. If this does not correct the problem, or if direct communication would not be productive, contact the District Manager, of if the complaint is against the District Manager, please contact the President of the Board.

HOLIDAYS:

All full- time employees are eligible for paid holidays. Paid holidays will be consistent with those recognized/authorized by the County of Marin. They currently are:

New Year's Day (January 1)
Martin Luther King Jr. Day (3rd Monday in January)
Presidents' Day (third Monday in February)
Memorial Day (last Monday in May)
Juneteenth (June 19)
Independence Day (July 4)
Labor Day (first Monday in September)
Veteran's Day (November 11)
Thanksgiving Day (fourth Thursday in November)
Day after Thanksgiving
Christmas Eve (December 24) If taking the half day, vacation time must be used for four hours
Christmas Day (December 25)
New Year's Eve Day (December 31)

Regular full-time employees will receive either (8) hours of pay for the above holidays if they do not work. Non-exempt employees who work on a holiday will receive time and a half for hours actually worked on the holiday. Non-exempt employees will either take the holiday off with pay, or take another day off within the same period. When a holiday falls on a Saturday, it is usually observed on the preceding Friday. A holiday that falls on a Sunday will usually be observed on the following Monday. Holiday closings will be announced in advance.

VACATION:

Vacation time off with pay is available to eligible employees to provide opportunities for rest, relaxation, and personal pursuits at the following accrual rates.

Employees, after their ~~introductory~~ Probationary period and until they reach two (2) years of employment, will receive ten (10) vacation days per year. After two (2) years of employment, employees will receive fifteen (15) days of vacation per year.

Vacation does not accrue during an unpaid portion of a leave of absence.

Full time employees may accrue a maximum of 200 hours of vacation time. If the total amount of unused vacation time reaches a "cap" of 200 hours, further vacation accrual will stop. When the employee uses paid vacation time and brings the available amount below the cap, vacation accrual will begin again. Upon termination of employment, employees will be paid for unused vacation time that has been earned through the last day of work at their current rate of pay.

All vacation time must be approved by the employee's supervisor or the District Manager and scheduled at least three weeks (21 days) in advance. The business operational needs of the BMKCSD, along with the seniority of the employees in the department, are factors that will be considered in granting vacation requests. Vacation can be taken at any time during the calendar year subject to supervisor or the District Manager's approval. The BMKCSD does not require employees who are using vacation time to monitor their email or other work messages or devices during their vacation. Management reserves the right to schedule an employee to take vacation time off as business necessitates.

SICK LEAVE:

On January 1 of each year, non-exempt employees will receive six (6) days or 48 hours of paid sick leave to use through the end of the calendar year (December 31). New hires will receive six (6) days or 48 hours of paid sick leave on their date of hire and may begin using available paid sick leave on their 90th day of employment. Unused sick leave does not carry over from year to year.

The BMKCSD does not require employees who are using sick time to monitor their email or other work messages or devices during their sick leave.

Usage

Upon written or oral request, employees may use sick leave for the following purposes: (1) Diagnosis, care, or treatment of an existing health condition, or preventive care for, an employee or an employee's family member/designated person; (2) For an employee who is a victim of domestic violence, sexual assault, or stalking, to obtain or attempt to obtain any relief, including, without limitation, an emergency protective order, a temporary restraining order, restraining order, Court appearance on any of the above cases, or other injunctive relief, to help ensure the health, safety, or welfare of the victim or their child; to seek medical attention for injuries caused by crime or abuse; to obtain services from a domestic violence shelter, program, rape crisis center, or victim services organization or agency as a result of the crime or abuse; to obtain psychological counseling or mental health services related to an experience of crime or abuse; or to participate in safety planning and take other actions to increase safety from future crime or abuse, including temporary or permanent relocation; or (3) As otherwise permitted by applicable law.

For purposes of this policy, "family member" means any of the following: (1) a child, which means a biological, adopted, or foster child, stepchild, legal ward, or a child to whom the employee stands in loco parentis, regardless of age or dependency status; (2) a biological, adoptive, or foster parent, stepparent, or legal guardian of an employee or the employee's spouse or registered domestic partner, or a person who stood in loco parentis when the employee was a minor child; (3) a spouse; (4) a registered domestic partner; (5) a grandparent; (6) a grandchild; (7) a sibling; and (8) a designated person. For purposes of this policy, a "designated person" means a person identified by the employee at the time the employee requests paid sick leave, however, an employee shall be limited to one designated person per 12-month period for paid sick leave.

Employees may use sick leave in minimum increments of two (2) hours. If the absence extends beyond two (2) hours, the actual time absent will be deducted from the employee's paid sick leave bank.

Notice

If the need for paid sick leave is foreseeable, the employee shall provide reasonable advance notification to their supervisor or the District Manager. If the need for paid sick leave is unforeseeable, the employee shall provide notice of the need for the leave as soon as practicable. Employees using paid sick leave will not be responsible for finding a colleague to cover their missed work time.

BMKCSD will not ask the purpose of the time off

Payment

For non-exempt employees, sick leave will be calculated based on the regular rate of pay for the work week in which the employee uses sick leave. For exempt employees, sick leave will be paid at the rate being earned at the time the sick leave is taken.

Sick leave benefits will be integrated with benefits provided under State Disability Insurance, if any. In no event shall the combination of disability benefits, plus sick leave benefits, exceed regular earnings.

Unused sick leave will not be paid out upon termination. Employees falsifying the need for paid sick leave are subject to disciplinary action up to and including termination of employment.

RETIREMENT:

BMKCSD does not offer a retirement ~~system, but~~system but does offer a simple IRA to all full time employees. The following rules apply to the simple IRA:

- Only available to full time employees
- Employee must enroll in a simple IRA and contribute to the plan in order for BMKCSD to contribute
- BMKCSD will pay matching employee contributions up to 3% of the employee's gross pay per payday
- If any ~~employees~~ employee does not contribute, then BMKCSD will not contribute to the simple IRA

MEDICAL INSURANCE:

All full-time employees will be provided medical ~~coverage~~.reimbursement, either employee only, employee plus one, or employee plus family, paid for by BMKCSD. Medical insurance reimbursement will be in accordance with the following policies:

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- Medical coverage will be reimbursed pursuant to QSEHRA guidelines.
- Coverage will only be paid for after 90 days of satisfactory employment.
- Employees will obtain their own coverage and present monthly invoices for reimbursement.
- Employees are responsible for the payment for the coverage expenses of their medical insurance if they are on ~~a~~leave without pay status.
- Coverage and reimbursement of medical insurance is terminated if the employee's full-time status changes.

DISABILITY INSURANCE (SDI):

To protect employees who miss work due to a non-work-related accident or illness, the law requires that a small percentage of each employee's wages, up to the prevailing maximum, be deducted each pay period for disability insurance. Benefits begin after the seventh day of the illness or accident. Eligible employees will be paid a percentage of their regular earnings for a maximum period provided by law in any one year.

PAID FAMILY LEAVE (PFL):

Employees who take time off to care for a parent, child, grandparent, grandchild, sibling, parent-in-law, spouse, or domestic partner with a serious health condition; to bond with a new child; or to

participate in a qualifying exigency related to covered active duty or a call to covered active duty for an employee's spouse, domestic partner, child, or parent in the Armed Forces of the United States, may be eligible for income replacement benefits through the California Employment Development Department ("EDD") for up to eight (8) weeks. Employees should contact their supervisor or the District Manager or visit the EDD's website for additional information. Employees must apply for Paid Family Leave benefits through the EDD and use up to two (2) weeks of accrued, unused vacation time (if any such vacation time is available), prior to receiving any Paid Family Leave benefits to which they are entitled. The EDD makes all eligibility and benefits determinations for Paid Family Leave.

Despite its name, Paid Family Leave is only an income replacement benefit. Employees who wish to take time off to care for a family member, to bond with a new child, or to participate in a qualifying exigency related to a family member must contact the DISTRICT MANAGER to request a leave of absence pursuant to BMKCSD's leave policies and obtain approval to take the leave.

UNEMPLOYMENT INSURANCE:

If your employment terminates, you may be eligible to receive unemployment insurance. In most cases, you must file a claim in order to collect this benefit. Should such a situation arise, you should inquire about unemployment at the time of your separation from BMKCSD.

SOCIAL SECURITY:

As an employee of BMKCSD, you are covered under the provisions of the Federal Social Security Law (FICA). The amount of deduction from your wages for Social Security taxes is matched by BMKCSD. The total contribution by you and BMKCSD is credited toward your Social Security benefits, which may be available at the time you are eligible to retire. In addition, disability and survivors benefits are financed through Social Security deductions.

WORKERS' COMPENSATION INSURANCE:

BMKCSD provides a comprehensive workers' compensation insurance program at no cost to employees. This program covers any injury or illness sustained in the course of employment that requires medical, surgical, or hospital treatment. Subject to applicable legal requirements, workers' compensation insurance provides benefits after a short waiting period or, if the employee is hospitalized, immediately. Employees who sustain work-related injuries or illnesses should inform their supervisor or the District Manager immediately. No matter how minor an on-the-job injury may appear, it is important that it be reported immediately. This will enable an eligible employee to qualify for coverage as quickly as possible.

LEAVES OF ABSENCE:

BMKCSD, at its sole discretion, may grant unpaid leaves of absence to employees in certain circumstances. It is important to request any leave in writing as far in advance as possible; to keep in touch with your supervisor or the District Manager during your leave; and to give prompt notice if there is any change in your return date. If your leave expires and you have not contacted your supervisor or BMKCSD, it will be assumed that you do not plan to return and that you have terminated your employment.

MEDICAL LEAVE OF ABSENCE:

Under the California Family Rights Act ("CFRA"), an unpaid leave of absence may be granted to employees who have worked for the BMKCSD for at least 12 months and a minimum of 1,250 hours in the 12 months preceding the leave. All leaves under this policy are referred to as "CFRA leave." Unless stated otherwise, the maximum allowable time for any CFRA leave under this policy is 12 weeks per a rolling 12-month period. A CFRA leave may be taken for the following

reasons:

- For the employee's own serious health condition (excluding pregnancy, childbirth, or related medical conditions) that makes the employee unable to work at all or unable to perform any one (1) or more of the essential functions of the position of that employee;
- Baby bonding with a newborn of the employee or child newly placed with the employee by adoption or foster care placement;
- To care for the employee's spouse, child, parent, domestic partner, grandparent, grandchild, parent-in-law, sibling, or designated person, with a serious health condition (For purposes of this policy, a "designated person" means any individual related to the employee by blood or whose association with the employee is the equivalent of a family relationship. The designated person may be identified by the employee at the time the employee requests the leave, however, the employee shall be limited to one designated person per 12-month period for purposes of CFRA leave); or
- Due to qualifying for Military Qualifying Exigency Leave (as defined and described below).

Employee Notice

Employees must provide sufficient information for the BMKCSD to determine if the leave may qualify as a CFRA leave, as well as the expected timing and duration of the leave. Sufficient information may include that the employee is unable to perform job functions, their covered family member or designated person is unable to perform daily activities, the need for hospitalization or continuing treatment by a health care provider, or circumstances that support the need for Military Qualifying Exigency Leave as indicated below. Employees also must inform the BMKCSD if the requested leave is for a reason for which CFRA leave was previously taken or certified. When possible, the BMKCSD requests 30 days' notice of the need for leave in order to plan for work coverage. If 30 days' notice is not possible, then employees must provide as much notice as practicable under the circumstances and must follow the BMKCSD's call-in and/or attendance policies.

BMKCSD Notice

Once an employee provides sufficient information, the BMKCSD will notify the employee (a) whether the employee is eligible for CFRA leave and, if so, (b) whether any additional information is required, and (c) the employee's rights and responsibilities regarding such a leave. The BMKCSD will also notify an eligible employee who has requested CFRA leave if the requested leave will be designated as CFRA protected leave and counted against the employee's leave entitlement.

If the BMKCSD determines an employee is not eligible for CFRA leave, the BMKCSD will provide at least one (1) reason for ineligibility. The BMKCSD will also inform the employee if it determines that the requested leave does not qualify for CFRA protection.

Employees not eligible for a CFRA leave may be eligible for an unpaid leave of absence due to their own disability or medical condition, which will be assessed by the BMKCSD on a case-by-case basis consistent with applicable law.

Serious Health Condition

To qualify for a CFRA leave for the employee's own serious health condition or to care for their covered family member/designated person who has a serious health condition, the employee or their covered family member/designated person must have a serious health condition. A serious

health condition is an illness, injury, impairment, or physical or mental condition that involves either an overnight stay in a medical care facility, or continuing treatment by a health care provider for a condition that either prevents the employee from performing the functions of the employee's job, or prevents the covered family member/designated person from participating in school or other daily activities.

Subject to certain conditions, the continuing treatment requirement may be met by a period of incapacity of more than three (3) consecutive calendar days combined with at least two (2) visits to a health care provider or one (1) visit and a regimen of continuing treatment or by an incapacity due to a chronic condition. Other conditions may meet the definition of continuing treatment.

Certification of Need for CFRA Leave

The BMKCSD may require an attending health care provider's certification of the employee or covered family member's/designated person's serious health condition. The BMKCSD may also require recertification supporting the need for leave upon the expiration of the prior certification. In any case in which the BMKCSD has reason to doubt the validity of any medical certification provided to support an employee's request to take CFRA leave because of the employee's own serious health condition, the BMKCSD may require the opinion of a second and third health care provider consistent with state law.

Military Qualifying Exigency Leave

Eligible employees under CFRA may be provided up to 12 weeks of leave in a rolling 12-month period when the employee has a qualifying exigency arising out of the fact that a spouse, domestic partner, child, parent, or parent-in-law is on covered active duty or call to active duty status in the National Guard or Reserves or Armed Forces. "Qualifying exigency" is defined by law as: (1) short-notice deployment, (2) military events and related activities, (3) childcare and school activities, (4) financial and legal arrangements, (5) counseling, (6) rest and recuperation, (7) post-deployment activities, (8) parental care, and (9) additional activities where the BMKCSD and employee agree to the leave. Time off for Military Qualifying Exigency Leave counts towards the 12-week maximum allowable time for CFRA leave under the CFRA.

During CFRA leave

When receiving State Disability Insurance ("SDI"), Paid Family Leave ("PFL"), BMKCSD - provided disability, or workers' compensation payments during a CFRA leave, employees may choose to apply any accrued, unused paid sick leave or vacation to supplement their SDI, PFL, BMKCSD-provided disability, or workers' compensation payments, up to 100% of their normal wages. When employees are not receiving SDI, PFL, BMKCSD-provided disability, or workers' compensation payments, they are required to use accrued, unused vacation and paid sick leave as follows:

- If an employee is on a CFRA leave due to their own serious health condition (excluding pregnancy, childbirth, and related medical conditions), they are required to use any accrued vacation or paid sick leave.
- If an employee is on a CFRA leave for baby bonding purposes or due to the serious health condition of a covered family member or designated person, they are required to use any accrued vacation time and then may choose to use any accrued paid sick leave.

During a CFRA leave, the BMKCSD shall maintain and pay for the employee's group health coverage at the same level and under the same conditions as coverage would have been provided

if the employee had not taken the leave. Therefore, the BMKCSD will continue to pay all applicable insurance reimbursements which it ordinarily pays on behalf of the employee. Employees must continue to pay their usual share of the insurance premium during the leave of absence.

The BMKCSD's obligation to maintain health benefits coverage ceases if an employee's premium payment is more than 30 days late. Prior to dropping coverage, the BMKCSD will provide written notice to the employee at least 15 days before coverage is to cease, advising that coverage will be dropped on a specified date at least 15 days after the date of the written notice, unless payment has been received by that date. If the employee fails to return from this leave, in some circumstances, the BMKCSD may attempt to recoup the cost of the insurance premiums paid on behalf of the employee during the leave.

Employees need not use their CFRA leave entitlement in one (1) block. Such a leave may be taken intermittently or on a reduced leave schedule when medically necessary. Employees must make reasonable efforts to schedule leave for planned medical treatment so as not to unduly disrupt the BMKCSD's operations. In addition, the basic minimum duration of intermittent bonding leave is two (2) weeks, however, the BMKCSD will grant a request for such leave of less than two (2) weeks' duration on two (2) occasions.

Returning to Work from CFRA leave

Employees returning to work upon conclusion of the CFRA leave will be returned to their original position or to an equivalent position with equivalent pay and benefits, provided such job would have been available had the employee not taken the leave. Prior to returning to work, where the leave of absence is for the employee's own serious health condition, the employee must provide the BMKCSD with certification from the attending health care provider indicating the employee is able to resume the employee's work.

Failure to return to work from a CFRA leave on the designated date may be interpreted as the employee's voluntary resignation. If the employee returns to work outside of the legally allotted time for such a leave without a valid excuse, the employee will only be reinstated if there is an available open position which they are qualified to fill.

CFRA Protections

Use of any of the leaves permitted by the CFRA cannot result in the loss of any employment benefit that accrued prior to the start of an employee's leave.

It is unlawful for employers to interfere with, restrain, or deny the exercise of any right provided under the CFRA or to discharge or discriminate against any person for opposing any practice made unlawful by law or for involvement in any proceeding under or relating to the CFRA.

If employees believe that they have been aggrieved, they may file a complaint with the California Civil Rights Department or may bring a private lawsuit against an employer.

PREGNANCY-RELATED DISABILITY LEAVE:

A pregnancy-related leave of absence will be granted in accordance with applicable law. Employees disabled due to pregnancy, childbirth, or related medical conditions are eligible for a maximum of four (4) months of leave per pregnancy upon medical certification of the health care

provider that the employee is so disabled. The "four (4) months of leave" means time off for the number of days or hours the employee would normally work within four (4) calendar months (one-third of a year or 17 1/3 weeks).

Employees may also be eligible for reasonable accommodations if the health care provider certifies it as medically advisable, including a reduced schedule or intermittent leave. If an employee's health care provider certifies that the employee has a medical need to take intermittent leave or leave on a reduced work schedule, the employee may be required to transfer temporarily to an available alternative position for which the employee is qualified, which has an equivalent rate of pay and benefits and can better accommodate the employee's leave requirements. Additionally, employees may transfer to a less strenuous or hazardous position or duties, if the health care provider certifies that the transfer is medically advisable and if such a transfer can be reasonably accommodated by the BMKCSD.

The BMKCSD requires the employee to utilize available paid sick leave during the otherwise unpaid portion of the leave (i.e., the portion of the leave in which the employee is not receiving payments from the State Disability Insurance program or private short- or long-term disability programs). An employee who is receiving such payments may elect to apply available paid sick leave, up to a combined total of 100% of their normal wages. The employee may opt to take all accrued vacation during the leave. Pregnancy disability leaves of absence run concurrently with time off under the FMLA (if the employee is otherwise eligible for FMLA), but not with time off under the CFRA.

The BMKCSD will continue to pay all applicable group insurance premiums which it ordinarily pays on behalf of the employee during the leave of absence. The employee must continue to pay the employee portion of the insurance premium during the leave of absence. Failure by the employee to make this premium payment may result in a loss of benefits.

At the conclusion of the pregnancy-related leave of absence, a medical certification from the health care provider stating the employee is released to return to work will be required. With limited exceptions, following a pregnancy disability leave an employee will be returned to the same position held when the leave began, consistent with applicable law. All requests for pregnancy-related leaves of absence, transfers, or accommodations should be made to the District Manager 30 days in advance, if possible. Returning employees should notify the BMKCSD at least five (5) work days prior to their return. Employees failing to return on their scheduled return date may be considered to have voluntarily resigned. Employees who remain disabled following their exhaustion of pregnancy disability leave should notify the District Manager to discuss possible reasonable accommodations.

BEREAVEMENT LEAVE:

Upon the death of a covered family member, employees are eligible to take up to five (5) days of bereavement leave.

The BMKCSD will pay up to three (3) days of bereavement leave and the remainder of the leave will be unpaid, except that an employee may use any accrued, unused sick leave during the unpaid portion of the leave. If additional time off is needed for bereavement, vacation pay may be used or the time off may be taken without pay, with District Manager approval.

A "covered family member," for purposes of this policy, means a person related by blood, adoption, or marriage, or any person residing in the immediate household of the employee at the time of death.

MILITARY LEAVE:
Employees who are in the Armed Forces of the United States will be granted leaves of absence in accordance with federal and State law.

JURY DUTY:
Any employee wishing to serve on jury duty may do so; however, time off to serve on jury duty will be without pay. Employees should bring any juror's summons to BMKCSD immediately after it is received.

CRIME VICTIM TIME OFF AND ACCOMMODATION:
An employee who is a "victim" may take time off in order to seek help to protect the employee or employee's children, or the health, safety or welfare, of the employee or employee's children.

For purposes of this policy a "victim" is defined as:

- A victim of stalking, domestic violence, or sexual assault.
- A victim of a crime (misdemeanor or felony offense, including an act of terrorism) that caused physical injury or that caused mental injury and a threat of physical injury.
- A person whose immediate family member is deceased as the direct result of a crime.
- Any person against whom any crime has been committed who needs to take time off from work to appear in court to comply with a subpoena or other court order as a witness in any judicial proceeding.

"Immediate family member" means any of the following: (1) A child, which means a biological, adopted, or foster child, stepchild, legal ward, or a child to whom the employee stands in loco parentis, regardless of age or dependency status; (2) A biological, adoptive, or foster parent, stepparent, or legal guardian of an employee or the employee's spouse or registered domestic partner, or a person who stood in loco parentis when the employee was a minor child; (3) A spouse; (4) A registered domestic partner; (5) A biological, foster, or adoptive sibling, a stepsibling, or a half-sibling; and (6) Any other individual whose close association with the employee is the equivalent of a family relationship.

An employee has the right to take time off from work to seek help to protect the employee or employee's children or the health, safety and ~~or~~ welfare, of the employee or employee's children. An employee can take time off to get a restraining order or other court order.

If an employee needs time off under this policy, the employee should notify the employee's supervisor or the District Manager as soon as possible. If advance notice is not possible, the employee may be required to provide appropriate written certification of the reason for the absence.

Any documentation provided to the BMKCSD identifying an employee as a victim shall be maintained as confidential and shall not be disclosed by the BMKCSD except as required by federal or state law or as necessary to protect the employee's safety in the workplace. The employee shall be given notice before any authorized disclosure.

This leave is unpaid by the BMKCSD, but an employee may use any accrued vacation or paid sick leave for such time off.

Reasonable Accommodation

The BMKCSD will provide reasonable accommodations to employees who are victims of domestic violence, sexual assault or stalking, for the employees' safety while at work. A reasonable accommodation may include the implementation of safety measures, such as a transfer, reassignment, modified schedule, changed work telephone, changed work station or installed lock; assistance in documenting domestic violence, sexual assault, stalking, or other crime that occurs in the workplace; an implemented safety procedure; or another adjustment to the employee's job duties and position.

To request an accommodation under this policy, an employee should contact the District Manager. The BMKCSD will engage in an interactive process with the employee to identify possible accommodations, if any, that are effective and will make reasonable accommodations unless an undue hardship will result.

The BMKCSD will make reasonable efforts to maintain the confidentiality of any employee accommodation, and will not tell co-workers or anyone else about requests for accommodation unless necessary to provide the employee with the accommodation.

No Retaliation or Harassment

The BMKCSD will not treat an employee differently or terminate the employee's employment for any of the following reasons:

- An employee is a victim of domestic violence, sexual assault, or stalking.
- An employee requested leave time to seek assistance under this policy.
- An employee asked for assistance or changes in the workplace to ensure safety at work.

TIME OFF FOR VOTING:

Employees who are unable to vote during non-work hours may arrange in advance to take up to two hours off from work to vote in a public election. The time taken must be either at the beginning or at the end of the workday. You should notify your supervisor or the District Manager two days in advance if you need this time.

PROHIBITION OF HARASSMENT, DISCRIMINATION, AND RETALIATION:

The BMKCSD is committed to providing a workplace free of sexual harassment and retaliation, as well as harassment and discrimination based on race, color, religion, sex, pregnancy (including childbirth and related medical conditions), gender, gender identity, gender expression, national origin, ancestry, physical disability, mental disability, age, medical conditions (including cancer or genetic characteristics), genetic information, marital status, military and veteran status, sexual orientation, transgender status, reproductive health decision-making (including, but not limited to, a decision to use or access a particular drug, device, product, or medical service for reproductive health), or any other basis protected by federal, state, or local laws (collectively, "protected categories"). The BMKCSD prohibits all such conduct by employees, managers, supervisors, or third parties towards other employees, interns, apprentices, applicants, volunteers, contractors, consultants or other persons with whom employees come into contact while engaged on BMKCSD business. Harassment, discrimination, and retaliation are prohibited by the BMKCSD in all business situations and environments, including, without limitation, in the workplace, at work-related networking or social events, at customer sites, and while traveling for work. In addition,

harassment, discrimination, and retaliation may violate the California Fair Employment and Housing Act and Title VII of the 1964 Civil Rights Act.

Harassment includes, but is not limited to, inappropriate verbal behavior (epithets, derogatory comments or slurs); physical behavior (assault, impeding or blocking movement, or any physical interference with normal work or movement); or visual behavior (derogatory posters, cartoons, or drawings). Harassment also includes conduct that has the purpose or effect of substantially interfering with an individual's work performance or creating an intimidating, hostile, or offensive working environment.

In addition, sexual harassment includes, but is not limited to, unwelcome sexual advances, requests, and propositions for sexual favors and other misconduct, such as staring or making sexual or other inappropriate gestures or facial expressions; touching someone else in an inappropriate manner, including unwelcome grabbing or hugging; impeding or blocking someone's movements; displaying vulgar or other inappropriate posters, cartoons, drawings, or other images or visual content; using sexualized or graphic epithets or slurs or making comments or jokes of a sexualized or graphic nature (whether verbally or in texts, emails, or other written form); and subjecting others to any inappropriate or degrading conduct based upon their sex or gender.

Discrimination means withholding or revoking employment-related opportunities or benefits, taking adverse employment actions against, or otherwise subjecting someone to negative treatment, due to their protected categories.

Retaliation involves subjecting someone to negative treatment (including, without limitation, withholding or revoking employment-related opportunities or benefits from someone or treating them in an otherwise hostile fashion) because they have engaged in protected conduct, such as opposing any practices forbidden by this policy, making an internal or external complaint regarding conduct they believed violated this policy; or participating in an investigation of or providing testimony regarding a claim of such misconduct.

Complaint Procedure

Any individual who believes that they have been subject to harassment (including sexual harassment), discrimination, or retaliation, or who is otherwise aware that someone has violated this policy or our Equal Employment Opportunity ("EEO") Policy, should immediately report this matter to their supervisor, any other BMKCSD supervisor, ~~or~~ the District Manager and the BMKCSD President. The complaint can be made verbally or in writing. Supervisors who learn of any conduct that may violate this policy against harassment, discrimination, or retaliation must immediately report it to the District Manager. If an employee has a complaint of harassment (including sexual harassment), discrimination or retaliation against the District Manager, they should submit their complaint to the BOARD President.

Investigations

All complaints of conduct that may violate this or the EEO policy will be investigated by the BMKCSD or Outside Investigator/Attorney. Investigations will be timely, impartial, fair, and thorough. Investigations will be kept confidential to the extent possible under ~~the circumstances~~State Law, ~~however, the investigation will not be kept completely confidential.~~ Employees are prohibited from impeding an investigation, and the BMKCSD will not allow retaliation against any employee because they have participated in an investigation. Information obtained during the investigation process will be only shared with individuals on a need-to-know basis. During the investigation, the BMKCSD will provide all parties with appropriate due process

and will reach reasonable conclusions based upon the evidence collected.

Employees who feel they have not received satisfaction after utilizing this procedure may contact the California Civil Rights Department (CRD) or the federal Equal Employment Opportunity Commission and seek remedies through these agencies.

Corrective Action

If an investigation discloses a violation of this policy, appropriate remedial action will be taken, up to and including termination of employment.

California Civil Rights Department Training

Please note that the CSDA makes sexual harassment training courses available online at the following website: www.csda.net/support/support-webinars/watch-ondemand. Employees ~~may~~ shall review the CSDA's training materials.

DRUG AND ALCOHOL USE:

BMKCSD is firmly committed to a policy against the use of illegal drugs or alcohol. In keeping with this commitment, BMKCSD strictly prohibits the use, transfer, possession, distribution, sale or being under the influence of illegal drugs or alcohol while on duty, while on BMKCSD's premises, or while operating a vehicle or vessel owned or leased by BMKCSD, or a vehicle or vessel belonging to a resident.

Use of these substances, and the use of prescription drugs and/or over-the-counter drugs, whether on or off the job can adversely affect an employee's work performance, efficiency, safety and health. In addition, the use or possession of these substances on the job constitutes potential danger to the welfare and safety of other employees and exposes BMKCSD to risks of property loss or damage, or injury to other persons.

Any employee who is using prescription or over-the-counter drugs that may impair the employee's ability to safely perform the job, or affect the safety or well-being of others, must notify ~~a supervisor or~~ the District Manager of such use immediately before starting or resuming work.

Violation of this policy may lead to disciplinary action, up to and including termination of employment, and/or required participation in a substance abuse rehabilitation or treatment program, as approved by the employee's health care practitioner. Such violations may also have criminal consequences.

PERSONAL APPEARANCE:

Dress, grooming, and personal cleanliness standards contribute to the morale of all employees and affect the business image BMKCSD presents to customers and visitors. Appropriate casual or business attire and appearance is expected during working time. Clothing should be neat, clean, tasteful and non-political. Avoid clothing that can create a safety hazard.

SMOKING:

Smoking is strictly prohibited in ALL places of employment, with limited exceptions. Under the law, smoking will not be allowed within the building premises. Smoking is not allowed within 50 feet of the building.

TELEPHONE:

All personal calls are to be limited to brief messages and responses.

CELLULAR TELEPHONES:

The BMKCSD requires that employees act responsibly when using cellular telephones. Common courtesy dictates that employees not use cellular telephones in the common areas of the office so as not to disturb other employees during working time. Further, employees who utilize cellular telephones in the office should place the ringers on vibrate or other silent notification so the work of other employees is not interrupted. Nothing in this policy shall prevent an employee from accessing the employee's cellular telephone for seeking emergency assistance, assessing the safety of an emergency situation, or communicating with a person to verify their safety.

Employees must adhere to all federal, state or local rules and regulations regarding the use of cellular telephones while driving. Accordingly, employees must not use cellular telephones if such conduct is prohibited by law, regulation, or other ordinance.

Employees should not use hand-held cellular telephones while driving for business purposes. Employees whose job responsibilities include regular driving or boating and, who choose to accept or make business calls during that time, are required to use hands-free telephone equipment to facilitate the provisions of this policy. Contact the District Manager to receive more information about this essential equipment.

Employees whose job responsibilities do not specifically include driving as an essential function, but who may use a cellular telephone for calls related to BMKCSD business, are also required to abide by the provisions above. Under no circumstances are employees allowed to place themselves or others at risk to fulfill business needs.

Employees who are charged with traffic violations resulting from the use of a cellular telephone while driving will be solely responsible for all liabilities that result from such actions. Violations of this policy will be subject to discipline up to and including termination.

E-MAIL POLICY/SOCIAL MEDIA POLICY:

The electronic mail (e-mail) system is maintained in order to facilitate the business of BMKCSD, and all messages sent, received, composed and/or stored on the system is the property of BMKCSD. The existence of a password on the system is not intended to indicate that messages will remain private, and all employees' passwords must be made known to BMKCSD. Messages on the e-mail system are subject to the same policies regarding harassment and discrimination as are any other workplace communications. Offensive, harassing or discriminatory content in such messages will not be tolerated. Use of the Internet is intended for business purposes only during working time. BMKCSD prohibits the downloading and distribution of copy-written material and unauthorized access to Internet websites.

The BMKCSD's electronic communication and information systems including, but not limited to, e-mail, voice mail, and computer system are BMKCSD property and should be used for BMKCSD purposes only during working time. Nothing should be entered into these systems without good reason. Further, an employee may not retrieve information from the BMKCSD's computer system for personal purposes or for use outside the employee's duties for the BMKCSD. All such use of the BMKCSD's computer system is unauthorized.

The BMKCSD reserves the right to: 1) Monitor and retrieve information from these systems to ensure that its property is being used for appropriate business purposes only; and 2) Disclose or use any information found in these systems. Employees do not have a personal privacy right in any matter created, received, sent, or stored in the BMKCSD's systems. Finally, employees should not disclose the BMKCSD's confidential, trade secret, and/or proprietary information from these

systems to unauthorized persons. Such information includes, but is not limited to, business and product plans; customer and dealer lists; technical data; unpublished costs, prices, and discounts; and estimates and financial projections.

The BMKCSD's Social Media Policy applies to employees who use/participate in the following:

- Multi-media and social networking websites including, but not limited to, LinkedIn, Facebook, Instagram, TikTok, Snapchat, and YouTube;
- Blogs and Micro-blogs such as Twitter; and
- Wikis, such as Wikipedia, and any other site where text can be posted.

All of these activities are referred to as "Internet Postings" in this Policy.

Common sense is the best guide if you decide to post information in any way relating to the BMKCSD. If you are unsure about any particular posting, please contact the District Manager for guidance.

Your Internet Postings should not disclose any information that is confidential or proprietary to the BMKCSD or to any third party that has disclosed information to the BMKCSD. Your postings should respect copyright, privacy, fair use, financial disclosure, and other applicable laws. Do not use any BMKCSD logo, trademark, or graphic without written approval.

Because you are legally responsible for your postings, you may be subject to liability if your posts are found defamatory, harassing, or in violation of any other applicable law. You may also be liable if you make postings which include confidential or copyrighted information (music, videos, text, etc.) belonging to third parties. All of the above-mentioned postings are prohibited under this policy if they relate to the BMKCSD, or its operations. The BMKCSD shall not be liable, under any circumstances, for any errors, omissions, loss, or damages claimed or incurred due to any of your Internet Postings.

If a member of the news media or blogger contacts you to comment on an Internet Posting on behalf of the BMKCSD, or any issue relating to the District for that matter, please refer that person to the District Manager.

Under no circumstances may Internet Posting interfere with your job duties. Non-exempt employees may not access BMKCSD e-mail, the Internet, or make Internet Postings for business purposes during non-working time unless specifically authorized by the employee's supervisor or the District Manager and all such time must be recorded as time worked Violation of this policy may result in disciplinary action up to and including termination.

EXPENSE REIMBURSEMENT:

The BMKCSD reimburses employees for all reasonable expenses that they incur directly in performing their job duties, including meals, travel, and mileage when required for business purposes. In order to obtain reimbursement from the BMKCSD, the employee must submit a copy of the appropriate bill, receipt, or other satisfactory evidence identifying the costs incurred to the Payroll Department consistent with IRS regulations. The employee must also complete the appropriate reimbursement request form and verify the amount of the expense, the date the expenses were incurred, and the reason why the expense was incurred. All reimbursement requests must be submitted within 30 days of incurring the expense. Employees will be reimbursed for mileage driven in their personal vehicles for business purposes at the then-current IRS rate.

PROHIBITED CONDUCT:

To ensure orderly operations and provide the best possible work environment, BMKCSD expects employees to follow rules of conduct that will protect the interests and safety of all employees and the organization. It is not possible to list all the forms of behavior that are considered unacceptable in the workplace. The following are examples of infractions of rules of conduct that may result in disciplinary action, up to and including termination of employment:

- Theft or inappropriate removal or possession of property
- Falsification of timekeeping records, employment records, employment information or other BMKCSD records
- Creation of a hostile work environment
- Improper or unauthorized use of District equipment
- Working under the influence of alcohol or illegal drugs
- Texting or cell phone usage while driving on District business
- Possession, distribution, sale, transfer or use of alcohol or illegal drugs in the workplace while on duty
- Hazing, bullying, fighting or threatening violence in the workplace
- Negligence or improper conduct leading to damage of BMKCSD-owned or resident-owned property
- Insubordination
- Sleeping during working time
- Violation of safety or health rules Smoking in prohibited areas
- Verbal harassment, including bullying, disrespectful or discourteous behavior
- Sexual or other unwelcome harassment or retaliation for having reported or threatened to report harassment
- Excessive absenteeism and tardiness, or any absence without notice
- Possession of dangerous or unauthorized materials, such as explosives or firearms, in the workplace
- Engaging in criminal conduct whether or not related to job performance
- Violation of personnel policies
- Unsatisfactory performance
- Unprofessional conduct, communication or behavior

~~Employment at BMKCSD is at the mutual consent of BMKCSD and the employee, and either party may terminate that relationship at any time, with or without cause, and with or without advance notice.~~

SAFETY:

Every employee should understand the importance of safety in the workplace. By remaining safety

conscious, employees can protect their own interests as well as those of their coworkers. Accordingly, BMKCSD emphasizes "safety first" and expects all employees to take steps to promote safety in the workplace. Refer to the "Illness and Injury Prevention Policy (IIPP) / Safety Handbook" for detailed conditions of safety. The following are basic conditions of safety:

Compliance is Essential

Employees must understand that compliance with safety requirements is a condition of employment, and will be evaluated, together with other aspects of an employee's performance, as part of the performance appraisal process. Employees who are particularly effective in following safe and healthful work practices may receive recognition for their effectiveness. Due to the importance of safety considerations to the BMKCSD, employees who violate safety standards, or who cause hazardous or dangerous situations, or who allow such conditions to remain when they could be effectively remedied, may be subject to disciplinary action, up to and including termination.

Reporting Unsafe Conditions and Risks

Whenever an employee identifies an unsafe condition or an occupational safety and health risk, the matter should be reported immediately to the District Manager, if the employee is unable to remedy the situation themselves. Employees are strongly encouraged to report any situation of this nature and need not fear any form of reprisal as the result of their compliance with this policy.

In the case of accidents that result in injury, regardless of how insignificant the injury may appear, employees should immediately notify their supervisor or the District Manager. Such reports are necessary to comply with laws and initiate insurance and workers' compensation benefits.

CODE OF SAFE WORK PRACTICES:

In order to carry out our safety program and ensure its success, the following code of safe work practices is put in place to heighten safety awareness and ensure cooperation. All employees shall:

- Report all unsafe conditions and equipment to their supervisor or the District Manager.
- Report all accidents, injuries and illnesses to their supervisor or the District Manager.
- Means of egress shall be kept unblocked, well lighted and unlocked during work hours.
- In the event of fire, evacuate the building.
- Upon hearing a fire alarm, stop work, secure your work area, and proceed to the nearest clear exit. Gather outside the building in designated areas.
- Work areas should be maintained in a neat, orderly manner. Trash and refuse are to be thrown in proper waste containers.
- All spills should be wiped up promptly.
- Files and supplies should be stored in such a manner as to preclude damage to the supplies or injury to personnel when they are moved. Heaviest items should be stored closest to the floor and lightweight items stored above.
- All cords running into walk areas must be taped down or inserted through rubber protectors to preclude them from becoming tripping hazards.
- Never stack material precariously on top of file cabinets or other high places.
- Never leave lower desk or cabinet drawers open that present a tripping hazard. Use care when

opening and closing drawers to avoid pinching fingers.

- Do not open more than one upper file drawer at a time; particularly the top two drawers on tall file cabinets.
- Always use proper lifting techniques. Never attempt to lift or push an object which is too heavy. You must contact your supervisor or the District Manager when help is needed to move a heavy object.
- All electrical equipment should be plugged into appropriate wall receptacles or into an extension of only one cord of similar size and capacity. Three pronged plugs should be used to ensure continuity of ground.
- Individual heaters at work areas should be kept clear of combustible materials such as drapes or waste from waste baskets.
- Appliances such as coffee pots and microwaves should be kept in working order, and inspected for signs of wear, heat or fraying of cords. Appliances should be turned off when not in use, or when employees leave the premises.
- Equipment such as scissors, staplers, etc. should be used for their intended purposes only and should not be misused as hammers, pry bars, screwdrivers, etc. Misuse can cause damage to the equipment and possible injury to the user.
- Cleaning supplies should be stored away from edible items on kitchen shelves.

SECURITY:

The following security considerations are offered to help maintain a secure workplace. Be aware of persons loitering for no apparent reason (e.g., in parking areas, walkways, entrances/exits and service areas). Report any suspicious persons or activities to your supervisor or the District Manager. Secure your work area at the end of the day or when called away from your work area for an extended length of time, and do not leave valuable and/or personal articles in or around your work station that may be accessible.

RECOVERY PERIODS:

The BMKCSD provides employees recovery periods as required by law. Recovery period means a cooldown period afforded to an employee to prevent heat illness.

Employees suffering from heat illness, believing a preventative recovery period is needed, or feeling the need to protect themselves from overheating, shall be provided access to an area with shade that is either open to the air or provided with ventilation for a period of no less than five (5) minutes. Such access to shade shall be permitted at all times.

Cooling measures other than shade may be provided if such measures are at least as effective as shade in allowing employees to cool. The BMKCSD will not require an employee to work during a recovery period mandated by law.

WORKPLACE VIOLENCE:

The BMKCSD has a zero-tolerance policy towards violent acts or threats of violence against employees, or non-employees with whom the BMKCSD has a business, service, or professional relationship. No employee may commit or threaten to commit any violent act against a co-worker or other individual in any business-related setting. This includes, but is not limited to, bringing weapons onto BMKCSD property or discussing the use of weapons, even in a joking manner.

Any employee who is subjected to or threatened with violence by a co-worker or another individual,

or is otherwise aware of a violation of this policy or of another individual who has been subjected to or threatened with violence in a business-related setting, must immediately report this information to their supervisor, or the District Manager. If the employee feels that the supervisor and/or the District Manager have not addressed the issue, the employee can raise the concern with the Board President.

An employee is permitted to use the employee's cellular telephone for seeking emergency assistance, assessing the safety of an emergency situation, or communicating with a person to verify their safety. Moreover, in the event of a true emergency, employees should immediately contact law enforcement by calling 911.

When an investigation discloses a violation of this policy, appropriate disciplinary action may be taken up to and including termination. There will be no retaliation against any employee who, in good faith, files such a complaint.

NON-FRATERNIZATION POLICY:

In order to effectively operate the District and avoid problems with supervision, morale or the creation of an environment which may produce claims of sexual harassment, managers and supervisors are strongly discouraged from fraternizing or becoming romantically involved with one another or with any subordinate employee in their chain-of-command or with any non-management employee. Additionally, non-management employees are strongly discouraged from fraternizing or becoming romantically involved with other employees in the District. Such relationships are prohibited when in the opinion of the District, the personal relationship may create a conflict of interest, cause disruption, create a negative or unprofessional work environment, or presents concerns regarding supervision, safety, security, or morale.

NEPOTISM / EMPLOYMENT OF RELATIVES:

The District may hire relatives of employees, officers or Board Members at its sole discretion and only in situations where the individuals involved do not, and will not, work in a supervisory or subordinate relationship or in positions where potential problems may arise regarding supervision, morale, security, safety or where potential conflicts of interest exist or have the potential to exist.

Relatives are defined as parent, child, spouse, registered domestic partner, brother, sister, in-laws, step relationships, persons living in the same household and people with close personal relationships (e.g. dating).

Current employees who become related will be permitted to continue working in the job held only if they do not work in a direct supervisory relationship with one another, in positions where a conflict of interest exists or has the potential to exist; or otherwise poses difficulties for supervision, morale, security or safety. The District will evaluate whether a problem or conflict exists and will determine the most appropriate solution. Depending on the circumstances, it may be necessary for one of the employees to separate employment from the District.

DISTRICT CREDIT CARD:

The District may provide a BMKCSD credit card for purchases of agency supplies, equipment, and the like. This credit card may only be used for District business. Usage of the credit card for personal purchases shall subject the employee to immediate discipline up to and including termination. District employees including the District manager shall not make purchases or enter into contracts for amounts exceeding ~~five thousand dollars ($5,000.00)~~ Three thousand five hundred ($3,500.00) without approval of the Board.

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IN CLOSING:

This Handbook has only briefly described some of the policies, benefits and procedures of the BMKCSD. If an employee has any questions, the employee should approach the employee's supervisor or the District Manager for assistance.

Because conditions change and future work situations are unpredictable, management reserves the right to add, delete, modify or change the contents of this Handbook, except for the "at-will" nature of the employment relationship, which may only be modified by a written agreement signed by the BOARD and the employee. Any future revisions to the statements contained in this Handbook will be distributed to all employees as soon as reasonably possible.

The policies and procedures set forth in this Handbook supersede any prior policies and/or procedures established to the contrary.

ACKNOWLEDGMENT OF RECEIPT

This is to acknowledge that I have received a copy of the Bel Marin Keys Community Services District's Employee Handbook and understand that it contains important information on BMKCSD's general personnel policies, and on my privileges and obligations as an employee. I understand that it is my responsibility to read, understand and adhere to BMKCSD's policies and procedures and I will familiarize myself with the material in the Handbook.

I understand that the Handbook provides guidelines for personnel concerning some of BMKCSD's policies and benefits. BMKCSD may modify, supplement, terminate or revise any of the provision of the Handbook, other than the at-will nature of the employment relationship, at any time.

_____ _____

EMPLOYEE'S SIGNATURE DATE

_____

EMPLOYEE'S NAME (Typed or Printed)

This form when signed will be placed in your official personnel file.

ACKNOWLEDGMENT OF EMPLOYMENT AT-WILL

I acknowledge that my employment at the Bel Marin Keys Community Services District ("BMKCSD") is "at-will," meaning that the terms of my employment may be changed with or without notice, and with or without cause, including, but not limited to termination, demotion, promotion, transfer, compensation, benefits, duties, and location of work. There is no agreement express or implied between the BMKCSD and me for continuing or long-term employment. Accordingly, either I or the BMKCSD may terminate the employment relationship at any time with or without notice, and with or without cause. No one other than the BOARD of the BMKCSD may enter into any agreement contrary to the policy of at-will employment and any such agreement must be in a writing signed by both the BOARD and the employee.

EMPLOYEE'S SIGNATURE _____ DATE _____

EMPLOYEE'S NAME (Typed or Printed) _____

This form when signed will be placed in your official personnel file.

MEASURE A_PARKS & OPEN SPACE COMMITTEE

JAN 6TH, 2026 | 6:30PM | BMK CSD 4 Montego Key, Novato, CA 94949

Msr A Committee_260108_Meeting Minutes

"Equitable access for all BMK residents to enjoy all community amenities, and stewardship for all parks and open spaces"

For Zoom Participation:
https://us06web.zoom.us/j/81194097337?pwd=pvanrdca3yyhBh8rWK4Dr6bHCcibWM.1

Meeting ID: 811 9409 7337
Passcode: 380335

Committee Members Attendance:

- ☑ Vince Lattanzio – CSD BOD lead
- ☑ Natalia Shorten – Committee lead
- ☑ Charlie Schonwasser
- ☑ Liz Fiengold
- ☐ ~~Brooke Stage~~
- ☑ Candra Canning
- ☑ Karen Herz
- ☑ Maureen Binetti
- ☐ ~~Suzanne Lawrence~~
- ☐ ~~Amy Dorie~~
- ☑ Jane Buerger
- ☐ ~~Elizabeth Geler~~
- ☑ Diann McKowen

➢ **FINANCES**
- Standard review
  - **$211,962.37 savings**
  - **$5,000 checking**
  - **Lisa needs to submit any scope of work plan to Marin County for review prior to May**

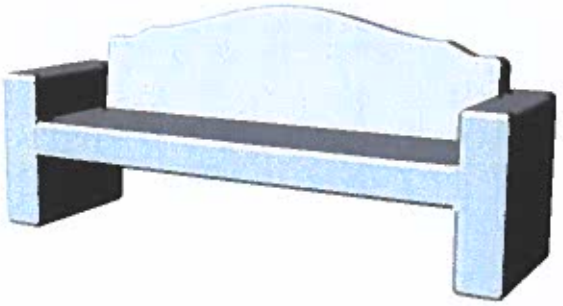
➢ **NEW BUSINESS:**
- Create masterplan for years of ongoing projects + costs need annually (pending)
  - **Aim for discussion of projects wish list in March 3rd Mtg**
- Trails (pending)

        - Pond trail to connect to Hamilton Bay Area Wetlands trail - "Safe Route to School"
            - **Still in progress, make calls to appropriate entities**
            - **Where are we with Coastal Conservancy and South Lagoon ownership? Can propose to make upgrades once this is complete**
    - Community Garden (pending)
        - Placeholder for further discussion, add to masterplan possibly
    - Playground Equipment (pending)
        - Placeholder to include in master plan - possible replacement or addition at Montego & refurbishment research
        - https://playgroundguardian.com/
        - https://www.gametime.com/cprs
    - Programs for 2026 (in progress)
        - Bench Program (Candra, Liz, & Diann)
            - Update on cost estimates for new benches
            - Brian walked parks and advised on what he can do, but there are limitations - benches could be restored possibly with powerwashing and board replacement (review Brian's comments)
            - Currently no powerwashing ability - needs spigots for all parks - should get a cost for this for ongoing maintenance
            - Discussion - replace vs. refurbish & where
                - **Candra & Diann reviewed bench program proposal with committee (approved) and will bring to Jan 15th board meeting for review and approval to use $30k funds from Msr A towards new benches**
                - **Will work on "Snag-a-Seat" honorary bench purchase availability with plaques**
                - **Design features requested for benches -**
                    - **drainage holes, graffiti coating, plaque indentation**
                - **Candra & Diann to meet with Brian to review powerwashing test run on (E) concrete benches @ Sunset Park, to determine if we can utilize Brian OR if we need to hire professional powerwasher**
        - Sidewalk Program (Suzanne & Natalia)
            - Suzanne - concrete contractor information
            - Brian advised on capabilities for CSD maintenance, grinding trip hazards, etc (for review)
            - Locate exact hazards for repair on a plan and get cost
                - **Natalia and Suzanne to bring proposal to committee Feb 3rd for sidewalk repair extent and cost, if approved, committee to bring recommendation to Feb 19th board meeting for approval of funds**
                - **GCs - Pulu + The Gardens GC - contacts for bids**
    - Ice Plant (in progress)
        - Landscapers replant in bare dirt patches until future work is determined
            - **Complete**
    - Work days, community outreach and coordination (pending)
        - Maureen, Jane, Brooke - organize a community work day, pizza, drinks, etc - develop clear work plan/scope to execute once aligned on projects

        - **Aiming for March/April when warmer - ask CSD for $$ to cover cost of pizza, etc for community volunteers**
- Communication (pending)
    - Important going forward, telling the community what work is being done through new website once master plan is finalized
        - **Consider including Measure A signs and informational updates at each park as projects are approved and completed.**

Bel Marin Key – Bench Project

Summary



Purchase 10 concrete benches with backs = $10,000

Rough Estimate for below = $15,000
- Remove 17 existing benches
- Debri box and disposal fee
- Forklift rental
- Install 10 new benches

Power Wash Company = $1,000

Cushion for exact quote to follow = $4,000

Total Project = $26,000 to $30,000

Timeline: Approve to proceed January and install by Spring
Recoup Costs: "Snag a Seat" Community Campaign
- $2,000 with placque

Bel Marin Key – Bench Project

Priority #1

Montego Key Park

- Repair 4 benches by replacing wood slats with cedar.
- $850 time and materials estimate x 4 = $3,400.
- Power Wash picnic tables and 2 bocce bench = $1,000.

Bahama Reef East

- Remove 3 benches.
- Purchase 2 concrete benches with backs.
- Fix damaged path.

Bahama Reef West

- Remove 4 benches.
- Purchase 2 concrete benches with back.
- Reorient 1 existing memorial concrete bench.

Sunset Park

- Power Wash 3 existing concrete benches.

Total = 4 new benches
Total = 7 remove and dispose

Bel Marin Key – Bench Project

Priority #2

Cavallo Cay Park

- Remove 3 benches.
- Purchase 2 concrete benches with backs.

Del Oro Park

- Remove 3 benches.
- Purchase 2 concrete benches with backs.

End of Old Caribe

- Remove 2 short old bench.
- Power Wash 1 memorial bench.

End of New Caribe

- Remove 1 bench.
- Purchase 1 concrete bench with back.

End of Del Oro

- Remove 1 bench.
- Purchase 1 concrete bench with back.

Total = 6 new benches
Total = 10 remove and dispose

AQUATIC PESTICIDES APPLICATION PLAN (APAP)

For

Bel Marin Keys Community Service District (BMKCSD)

Marin County, California

In partial fulfillment of requirements for coverage under the

STATEWIDE GENERAL NPDES PERMIT FOR THE DISCHARGER OF AQUATIC PESTICIDES FOR AQUATIC WEED CONTROL IN WATERS OF THE UNITED STATES

WATER QUALITY ORDER No. 2013-0002-DWQ
GENERAL PERMIT NO. CAG990005

BMKCSD
4 Montego Key
Novato, CA 94949

November 10, 2025

Contents

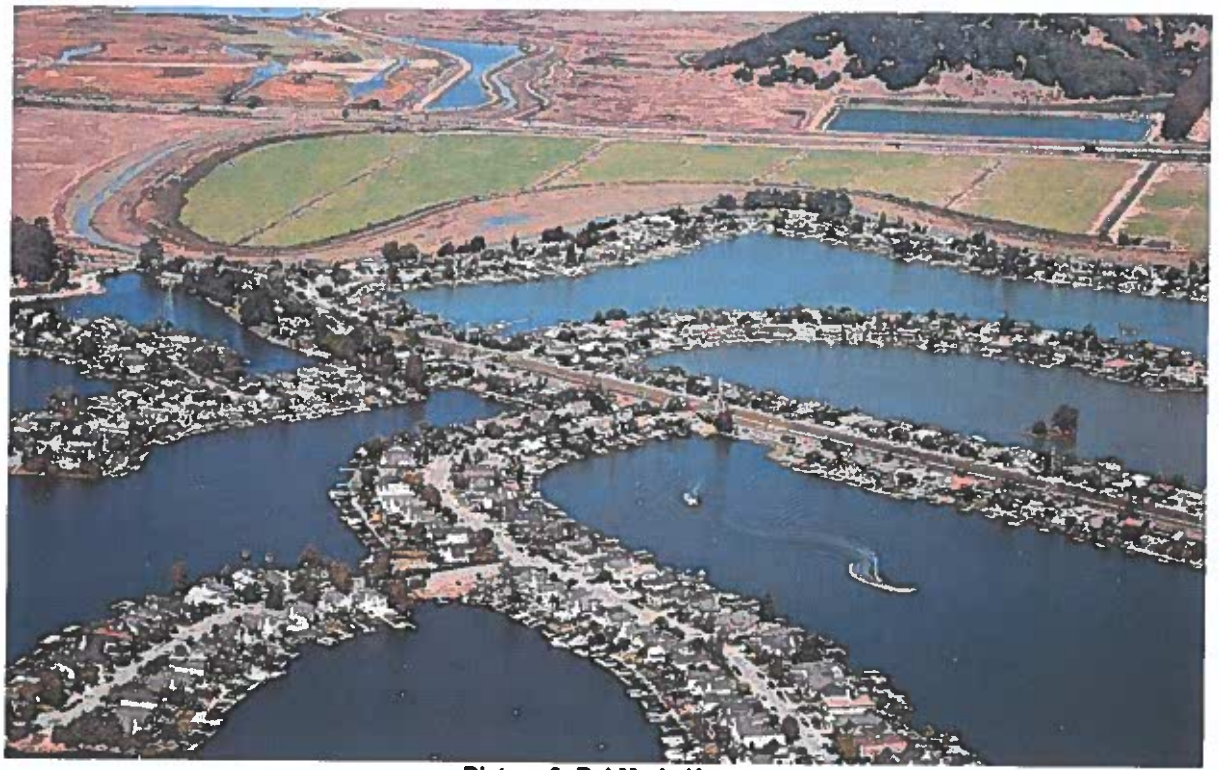
Picture 1: Bel Marin Keys
Photo Courtesy of the San Francisco Chronicle

INTRODUCTION

The Bel Marin Keys Community Service District (BMKCSD) an unincorporated portion of northeastern Marin County, California. It was created via resolution on June 26, 1961, by the Marin County Board of Supervisors BMKCSD Enabling Resolution 6797. The BMKCSD is a non-enterprise Special District; the District is a public entity that derives much of its revenue from a percentage of the property taxes collected by the County of Marin.

The BMKCSD is subject to statutory requirements such as public meetings and public contracting laws and is governed by a five-member Board of Directors elected to a staggered four-year term; by voters residing within the boundaries of Bel Marin Keys. All parcels within BMK are subject to Covenant Codes and Restriction (CC&R's) designed for each unit within Bel Marin Keys.

Many of the homes abut the man-made North & South Lagoons or Novato Creek. Both lagoons have access to Novato Creek through navigational locks which allow residents to take their boats into San Pablo Bay.



Picture 2: Bel Marin Keys
Photo courtesy of Bob Minkin

1 DESCRIPTION OF THE WATER SYSTEM

These saltwater Lagoons are located southeast of the city of Novato in Marin County. The Receiving Water for the Lagoons is San Pablo Bay by way of Novato Creek. The Lagoon is owned and operated by the Bel Marin Keys Community Service District.

The North Lagoon has a surface area of 113 acres with a maximum depth estimated around 10 feet. The South lagoon is 158 acres with several deep coves over 35 feet in depth. The lagoons serve as recreation areas, aesthetic amenities, and natural habitat.

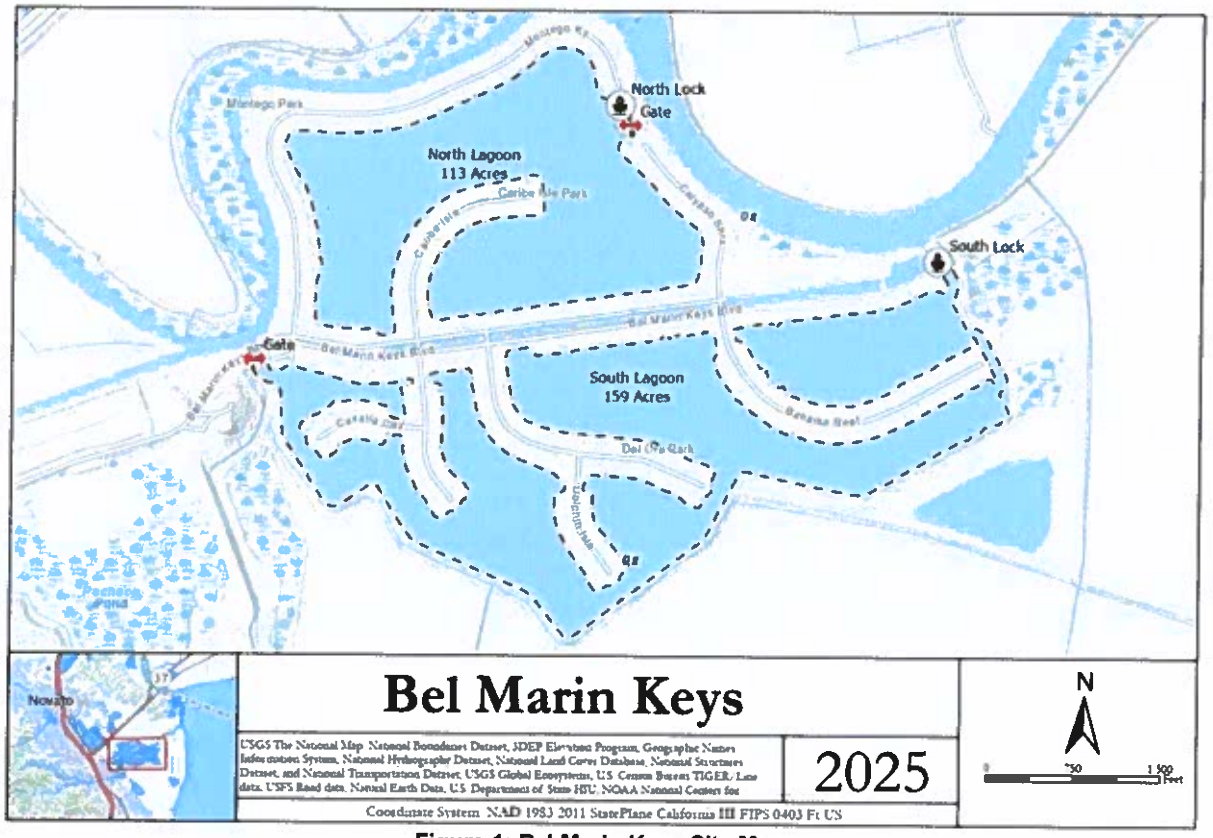


Figure 1: Bel Marin Keys Site Map

Source water for the Lagoons is partly from stormwater runoff from the neighborhood. The South Lagoon receives runoff from Pacheco Pond and via the gates and locks connected to Novato Creek.

2 TREATMENT AREA

Application locations and their extent will vary depending on the target species, time of year, and other environmental conditions. Generally, the treatment area will be the littoral zone of the lagoons and applications will be made to maintain the Lagoon's beneficial uses including but not limited to recreation and the water quality objectives in the Basin Plan[1].

3 WEEDS AND ALGAE SUBJECT TO CONTROL

Target organisms have historically included widgeongrass (*Ruppia maritima*) and various species of filamentous algae which can interfere with boating and swimming, causing safety concerns. Excessive growth can also impact water quality objectives, generate odors, and pose additional potential risks to residents and guests.

Regionally, Harmful Algal Blooms (HABS) caused by cyanobacteria and Red Tide, caused by dinoflagellates have posed significant risks to aquatic ecosystems and human health where recreation is permitted. Therefore, though historically not present in these Lagoons, if the presence of these pests is identified, they may be targeted for control.

4 AQUATIC PESTICIDES USED AND APPLICATION METHODS

Table 1: Pesticide products to be used

Pesticide Active Ingredient	Example Brand Names	Method of Application	Surfactant
Imazamox	Imox, Top Deck, Castaway	Subsurface injection, broadcast, aerial	CA DPR approved aquatic surfactants
Diquat	Reward, Tribune, Alligare Diquat	Subsurface injection, broadcast, aerial	CA DPR approved aquatic surfactants
Copper Complexes	Argos, Captain XTR, Cutrine Ultra	Subsurface injection, broadcast, aerial	CA DPR approved aquatic surfactants
Hydrogen Peroxide & PAA	GreenClean 5.0	Subsurface injection, broadcast, aerial	N/A
Sodium Carbonate Peroxyhydrate	GreenClean Pro, PAK27	Slurry injection/broadcast, granular spreader, aerial	N/A
Fluoridone *(pending Section 24 approval)*	Fluoridone, Sonar AS,	Slurry injection/broadcast, granular spreader, aerial	CA DPR approved aquatic surfactants

5 DECISION FACTORS FOR USING AQUATIC PESTICIDES

Integrated Pest Management (Physical and cultural) tactics are employed to inhibit the growth of nuisance organisms; however, environmental conditions have the potential to cause these tactics to become infeasible and/or to have an adverse impact on the Lagoons' ecosystems. Therefore, chemical control tactics may at times be the least intrusive method to control a target organisms.

Treatment thresholds are based on the abundance and/or extent of the organism as well as environmental conditions including the weather forecast, water quality conditions, and knowledge of the historical patterns of growth. BMKCSD on-site staff, Board of Directors and committee members will use their discretion, in consultation with professionally licensed aquatic pesticide applicators (QAL, category F) and/or a Pest Control Advisor (PCA), when warranted, to implement chemical control tactics.

A control threshold shall be considered immediately met if any of the beneficial uses of the Lagoons are threatened.

6 GATES, CONTROL STRUCTURES, AND INSPECTION SCHEDULE

Each Lagoon has a navigation lock as well as a gate. The locks are used to bring water into the lagoons while the gates are used to release water. All structures are routinely inspected and maintained by the BMKCSD Waterways Manager.

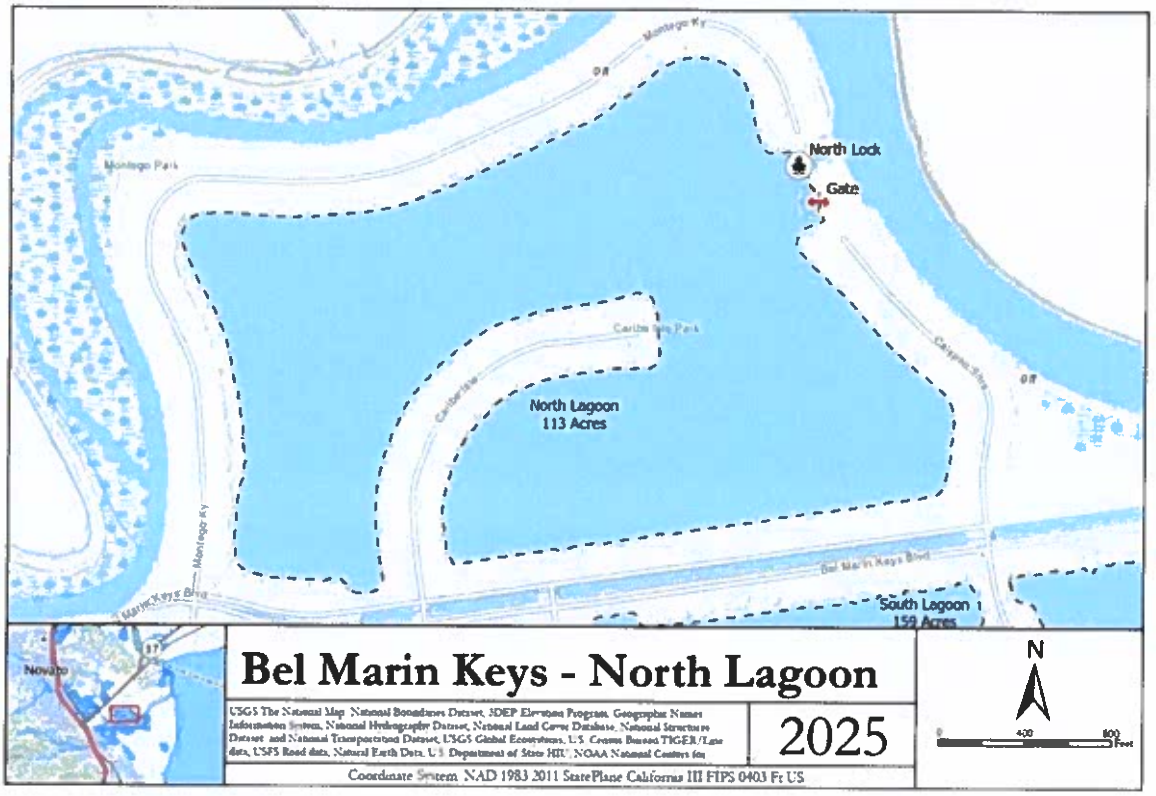


Figure 2: North Lagoon Control Structures

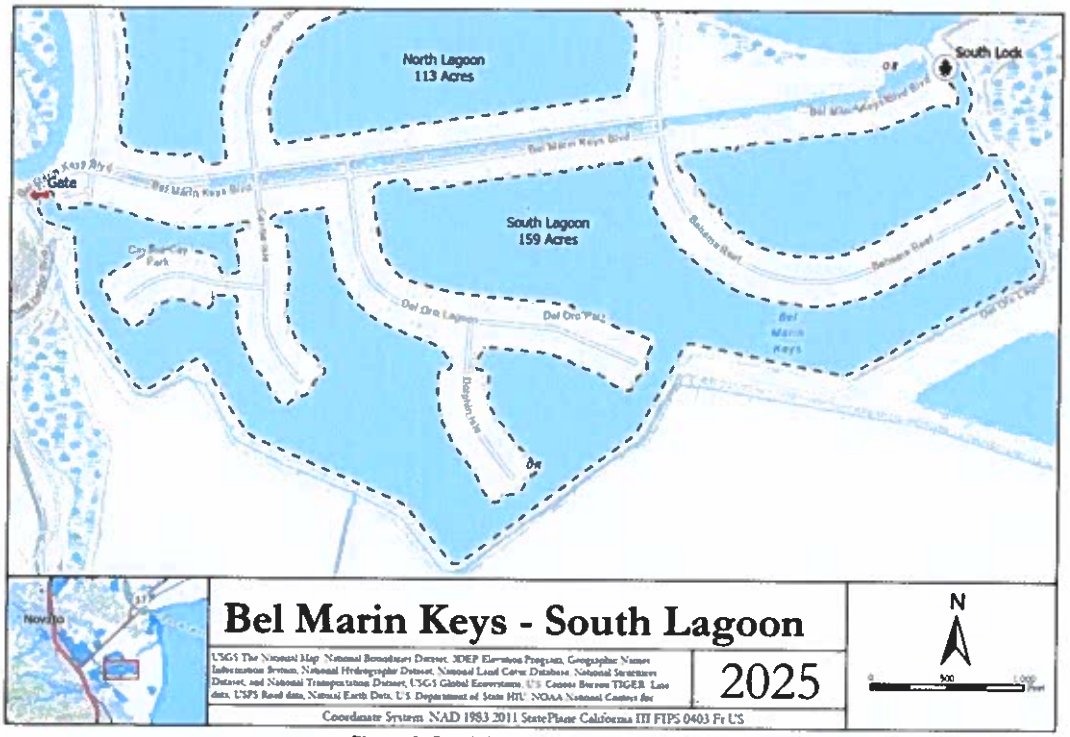


Figure 3: South Lagoon Control Structures

While these gates provide manual control, water flow direction is driven by gravity and therefore dependent on tides. At high tide, when the gates are opened, water from Novato Creek can flow by gravity through the locks or control gates into the lagoons; at low tide, water can flow from the lagoon through the open locks or control gates into the Creek. BMKCSD Staff controls the gates in coordination with tides to control the Lagoon's operating levels and to meet water quality objectives.

Water levels in the Lagoons are controlled to achieve winter operating level (WOL) which is focused on storm water control for the protection of property, and summer operating level (SOL) focused on maintaining beneficial uses.

7 SIP CATEGORICAL EXCEPTION

The BMKCSD has not applied for a Categorical Exception per Section 5.3 of the Policy for Implementation of Toxic Standards for Inland Surface Waters, Enclosed Bays, and Estuaries of California.

8 MONITORING AND REPORTING PROGRAM (MRP)

Water quality monitoring will be performed in compliance with the Monitoring and Reporting Program (MRP) for Water Quality Order NO 2013-0002-DWQ and amending orders as of the writing of this APAP. Samples will be collected and analyzed per MRP guidelines as stated in the General Permit, Attachment C, Table C-1. Monitoring Requirements. Table 2: Monitoring requirements per NPDES General Permit

Sample Type	Constituent/Parameter	Units	Sample Method	Minimum Sampling Frequency	Sample Type Requirement	Required Analytical Test Method
Visual	1. Monitoring area description (pond, lake, open waterway, channel, etc.) 2. Appearance of waterway (sheen, color, clarity, etc.) 3. Weather conditions (fog, rain, wind, etc.)	Not applicable	Visual Observation	1	Background, Event and Post-event Monitoring	Not applicable
Physical	1. Temperature[2]	°F	Grab[4]	5	Background, Event and Post-event Monitoring	6
	2. pH[3]	Number				
	3. Turbidity[3]	NTU				
	4. Electric Conductivity[3] @ 25°C	µmhos/cm				
Chemical	1. Active Ingredient[7]	µg/L	Grab[4]	5	Background, Event and Post-event Monitoring	6
	2. Nonylphenol[8]	µg/L				
	3. Hardness (if copper is monitored)	mg/L				
	4. Dissolved Oxygen[2]	mg/L				

1 All applications at all sites.
2 Field testing.
3 Field or laboratory testing.
4 Samples shall be collected at three feet below the surface of the water body or at mid water column depth if the depth is less than three feet.
5 Collect samples from a minimum of six application events for each active ingredient in each environmental setting (flowing water and non-flowing water) per year, except for glyphosate. If there are less than six application events in a year, collect samples during each application event for each active ingredient in each environmental setting (flowing water and non-flowing water). If the results of monitoring from six consecutive application events show concentrations that are less than the receiving water limitation/trigger for an active ingredient in an environmental setting, sampling shall be reduced to one application event per year for that active ingredient in that environmental setting. To support a reduction in monitoring frequency, the six sampling events showing concentrations that are less than the receiving water limitation/trigger for an active ingredient must be consecutive and can span more than one year or application season. The reduction in monitoring frequency under this provision applies to all listed active ingredients including SIP listed active ingredients If the yearly sampling event shows exceedance of the receiving water limitation/trigger for an active ingredient in an environmental setting, then sampling shall return to six application events for that active ingredient in each environmental setting. For glyphosate, collect samples from one application event from each environmental setting (flowing water and non-flowing water) per year.
6 Pollutants shall be analyzed using the analytical methods described in 40 C.F.R. part 136.
7 2,4-D, acrolein, chlorine, dissolved copper, diquat, endothall, flumioxazin, fluridone, glyphosate, imazamox, imazapyr, penoxsulam, and triclopyr.
8 It is required only when a surfactant is used.

Monitoring Frequency and Locations

Monitoring for BMKCSD may be performed by a contractor or by in-house staff. Monitoring locations will be determined for each treatment event, based on the treatment area within the Lagoon. Monitoring frequency will follow the schedule set forth by the NPDES general permit and is summarized below:

Background Monitoring

Background monitoring samples shall be collected in the application area just prior to (up to 24-hours in advance of) an application event.

Event Monitoring

Event monitoring samples shall be collected outside of the treatment area, immediately after the application event, but after sufficient time has elapsed such that treated water would have exited the treatment area.

Post-event Monitoring

Post-event monitoring samples shall be collected within the treatment area within one week after application.

One full set of three samples (Background, Event and Post-Event) will be collected during each treatment from the representative site(s) treated within the Lagoon.

Sample Analysis

All laboratory analysis shall be conducted at a laboratory certified for such analysis by the California Department of Health. All analyses shall be conducted in accordance with the latest edition of "Guidelines Establishing Test Procedures for Analysis of Pollutants" (Guidelines), promulgated by the USEPA (Title 40 CFR Part 136)[ii].

Sample Preservation and Delivery

Samples will be collected in appropriate containers as instructed by the lab performing the analysis. Should an analytical method require preservation or filtration in the field, that will occur. Once collected and labeled, samples will be immediately placed in a dark, cold (~4C) environment, typically a cooler with ice. Delivery of samples to the laboratory will be accomplished within the labs specified hold times for the sample method.

Annual Reporting

An annual report will be submitted to the appropriate Regional Water Quality Control Board (RWQCB) by March 1 of the year following treatment. If no algaecide or aquatic herbicide treatments are done that year, a letter stating no applications have been done will be sent to the appropriate RWQCB in lieu of an annual report.

Chemical Application

Bel Marin Keys
North Lagoon
Bel Marin Keys, CA 94949, USA

General Info

66 F
Clear Sky
Wind: 21 mph South
36% Humidity

Log ID*
Log #*
Start Date/Time*
End Date/Time*
Lead Staff*
Additional Staff
NPDES

Water Conditions

Water Body Type*
Lagoon
Water Temp (F)*
Water Depth (ft)*
Water Flow (ft/s cfs)
Percent Cloud Cover*
Water Color*
Green
Water Clarity*
Water Sheen
(check if present)

Application Info

Target Species:
Percent Covered
75
Application Method
Boat

Water Quality

Pre-Application Monitoring

+ Add Row

Date	Parameter	Reader	Value	Units
10/14/2024 12:26 pm	Specific Conductivity (mS/cm)			µS/cm
10/14/2024 12:28 pm	Dissolved Oxygen			mg/L
10/14/2024 12:28 pm	Turbidity			NTU
10/14/2024 12:27 pm	pH			pH

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Chemicals

Chemical:
Triclopyr 3a
Stock:
General Stock
Rate
1.5
Rate Units
ppm
Product Type:
EPA #:
81927-13
Total Amount
6.0
Units
gal
State #:
Active Ingredient:
Triclopyr 44.4%

Photos



Notes

9 PREVENTING SAMPLE CONTAMINATION

BMKCSD will require that samples collected shall be, when possible, collected upwind and not in close proximity to application equipment. BMKCSD shall require there be no contact between a sampler and any pesticides or application equipment including spray tanks, containers, application boats or vehicles or applicators' personal protective equipment.

When sampling is completed in a given location, all equipment will be cleaned with an appropriate detergent and triple-rinsed. Once at a new sampling location, the equipment will be rinsed once with the water being sampled prior to collection.

Samples will be tightly sealed at the point of collection and placed upright within an ice chest used solely for sample transport.

10 DESCRIPTIONS OF BMPS TO BE IMPLEMENTED

BMKCSD will implement the following BMPs

Spill Prevention and Containment

All pesticide applications will be contracted out to a California Department of Pesticide Regulation – licensed Pest Control Business (PCB). PCB staff are required to undergo training according to the California Department of Pesticide Regulation's Pesticide Safety Information Series, including Leaflet PSIS N-2 "Storing, Moving, and Disposing of Pesticides in Non-Agricultural Settings"[iii] . This leaflet includes accepted BMPs to prevent spills or contamination and in the event of a spill, it includes measures to contain pesticide products, apply absorbent material, and remove products to a proper disposal location. Label and SDS sheet instructions for the products being applied will be followed and reporting will commence as required by local, state, and federal laws.

Ensure Appropriate Rate

BMKCSD shall obtain a written recommendation from a licensed Pest Control Advisor (PCA) to ensure that applications are made in accordance with the product labels. BMKCSD will further ensure that applications are performed by licensed or qualified individual from the PCB contracted to perform an application.

Education

BMKCSD shall confirm that the contracted PCB provides evidence that its staff have active licenses and/or have undergone pesticide handler safety training including the products selected for use at their site, as required by DPR. Applicators shall be familiar and comply with the contents of this APAP prior to making an application.

Planning and Coordination

The General Permit requires that every calendar year, at least 15 days prior to the first application of algaecide or aquatic herbicides, a discharger shall notify potentially affected public agencies and post the notification on its website.

BMKCSD will post on its website and submit a notification in accordance with Section VIII.B Public Notice Requirements. The notification will include the following entities:

- Marin County Department of Agriculture[iv]
- Marin County Flood Control and Water Conservation District[v]
- California Department of Fish and Wildlife, Region 3[vi]

Preventing Fish Kills

All herbicide applications will be performed by a professional applicator who has received training specific to the herbicide and surfactant products to be used. The PCA written recommendation will include rates of application and any warnings or conditions that limit the application so that fish are not adversely affected. All manufacturers label instructions for rates and mixing and precautions to prevent fish kills will be followed.

11. EXAMINATION OF POSSIBLE ALTERNATIVES

Physical Controls.

Mechanical and manual removal of aquatic weeds and filamentous algae is performed throughout the late spring and summer. BMKCSD utilizes manual and mechanical tools to this end.

Artificial circulation is accomplished via the manipulation of the circulation gates. BMKCSD or individual homeowners may also choose to install dock mounted circulators to reduce the stagnant conditions which encourage the growth or accumulation of nuisance organisms.

Cultural Controls

Light Attenuating Dyes. Aquatic dyes have not historically been used in the Lagoons. Applications of dye, if selected as a control tactic would begin when turbidity is sufficiently low that sunlight can begin to stimulate plant growth. Applications would typically begin in March and continue through November to maintain light attenuating conditions.

Stakeholder Outreach and Education. Education of homeowners regarding measures to prevent nutrients and pesticides from entering the Lagoon from rainfall, bird droppings and irrigation runoff is discussed in the District's regular newsletter.

Maintaining Low Salinity. When feasible, BMKCSD will maintain lower salinity to reduce the growth of the marine organisms that cause nuisance conditions. This is

achieved by keeping the gates closed after the rainy season and only adding enough water from Novato Creek to maintain its beneficial uses.

Maintaining Cooler Water Temperature. When feasible, BMKCSD will maintain cooler water temperatures to prolong the number of degree days required for nuisance organisms to germinate or grow. This tactic can be employed once salinity has exceeded a threshold that no longer warrants use of that tactic.

Biological Controls

Use of Predators and Competitors. BMKCSD may implement the use of biological control strategies if suitable solutions become available/permissible. Examples may include the introduction of species that pray on nuisance organisms or the introduction of competitors such as organisms that rely on the same food or energy/nutrient source as the pests. Floating wetland islands are one tool used to increase periphyton. Ther are also products manufactured to increase periphyton and to manipulate the microbial loop within the Lagoon's food chain. These may be considered for use to compete with pests for phosphorus, nitrogen, or other micronutrients.

Non-Pesticidal Chemical Controls

Use Of Nutrient Sequestering Products. BMKCSD may implement the application of products designed to sequester nutrients to reduce pest growth. These products may be applied to the water itself or installed in filter bags at storm drains, gates or suspended in the water column. Examples include but are not limited to: BioChar, PhosFlow, Poseidon Pellets, flocculants containing aluminum, lanthanum, or equivalent products.

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[i] https://www.waterboards.ca.gov/sanfranciscobay/basin_planning.html

[ii] https://www.ecfr.gov/current/title-40/chapter-I/subchapter-D/part-136

[iii] https://www.cdpr.ca.gov/docs/whs/pdf/hs1743.pdf

[iv] https://www.marincounty.gov/departments/AWM

[v] https://flooddistrict.marincounty.gov/marin-county-flood-control-district-contact-form/

[vi] https://wildlife.ca.gov/Regions/3

LakeTech

ESTIMATE

LakeTech, Inc.
PO Box 6
Benicia, California 94510
United States

Mobile: 4153070943
www.laketech.com

BILL TO
Bel Marin Keys Community Services District
Brian Clark
4 Montego Key
Novato, California 94949
United States

4159963900
bclark@bmkcsd.us

Estimate Number: 92
Estimate Date: December 5, 2025
Valid Until: January 4, 2026
Grand Total (USD): **$4,807.57**

Items	Quantity	Price	Amount
Aeration & Fountains	1	$2,501.22	$2,501.22
Shippnig FedEx Ground	1	$100.00	$100.00
Labor Senior Technician = $165/hour.	8	$165.00	$1,320.00
Labor Field Technician = $85/hour Senior Technician = $165/hour	8	$85.00	$680.00

Subtotal:	$4,601.22
Marin 8.25%:	$206.35
Grand Total (USD):	**$4,807.57**

Notes / Terms

We will waive travel time & toll and provide all equipment and tools required.

Scope of work will includes, working with BMK waterways manager to train on maintenance and repairs and to assist in cleaning cabinets and rebuilding compressors, replace all necessary push-connect fittings and hoses, air filters. Lastly, to adjust valves to the diffusers to ensure appropriate airflow to each line.

Assumptions and exclusions:

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LakeTech

ESTIMATE

LakeTech, inc.
PO Box 6
Benicia, California 94510
United States

Mobile: 4153070943
www.laketech.com

No, in water work will be required of LakeTech, all diffusers will be cleaned and placed back into the lagoon prior to this scope.

SVENDSEN'S BAY MARINE
BAY MARITIME GROUP

Northern California's Premier Boatyard with Absolute Customer Satisfaction Guaranteed!

10/29/2025

Vessel: Stop Log Fabrication
Name: Brian Clark
PM: Sam Elliott
WO #: 513882
CO #: 4 - 5

Please sign and date below each change order you wish to approve.

CO4	Fabricate (18) Stop Logs and (2) Half-Height Stop Logs	$	117,157.25

* Fabricate stop logs for Bel Marin Keys North Channel to match design 8C
* (18) sets of 16" tall stop logs will be fabricated (9 for lagoon side, 9 for creek side)
* (2) sets of 8" tall stop logs will be fabricated (1 for lagoon side, 1 for creek side)
* Each stop log section will be 6" thick, with 3" wide section on each end that is 7.5" thick to fit cement channel and 228-7/16" long
* Each stop log section will be fabricated from 8" x 6" x .375" wall rectangular aluminum tube (6061-T6)
* Both ends of stop logs will be capped off with a vertical section of 3/4" thick x 3" wide x 16" long aluminum 6061-T6 flatbar
* Neoprene rubber will be installed on bottom edges of each stop log to help seal off water flow, although complete watertight barrier will not be achieved
* **This quote does not include any in-field work to install stop logs - if assistance is required, a separate quote will be provided**
* All material is yard furnished

Customer Signature: _____ **Date:** _____

CO5	Deliver Stop Logs to Bel Marin Keys	$	3,164.00

* Svendsen's Bay Marine will deliver stop logs to Bel Marin Keys
* Bel Marin Keys to provide forklift or other means to offload stop logs

Customer Signature: _____ **Date:** _____