

**PLEASANT VALLEY RECREATION & PARK DISTRICT
CITY OF CAMARILLO, CITY HALL COUNCIL CHAMBERS
601 CARMEN DR., CAMARILLO, CALIFORNIA**

**BOARD OF DIRECTORS
REGULAR MEETING AGENDA
July 6, 2022**

Please Note: In keeping in alignment with current orders from the Ventura County Health Officer, face coverings are not required but are welcomed and encouraged in indoor public settings and businesses. PVRPD thanks you for your cooperation and understanding.

This meeting will take place both in person and remotely in accordance with Government Code section 54953(e) *et seq.* (AB 361). Members of the public can observe and participate in the meeting as follows:

- 1. Attend in person or you may observe the PVPRD Board meeting via live broadcast on the Local Government Channels – Spectrum Channel 10 and Frontier Channel 29.**
- 2. The meeting will also be live streamed on YouTube at:
<https://www.youtube.com/channel/UCCjEyMW3h472YEO9gI3Qgig>**
- 3. Zoom Meeting Information:**
 - Meeting Link: <https://us06web.zoom.us/j/83398486034>**
 - Webinar ID: 833 9848 6034**
 - Phone Number: 1-669-900-6833**
 - a. Cell Phone/Computer with Microphone: Click on the Zoom webinar link included above. Enter your name so we may call on you when it is your turn to speak. The Chair will ask if anyone wishes to speak on the item. At that time, raise your hand by clicking the “Raise Hand” button. Follow the instructions below regarding speaking.
 - b. Phone – If you wish to make a comment by phone during the public comment section of the meeting or on a specific agenda item, please call into the listed phone number above and when prompted, enter the Webinar ID and Passcode. After entering those items, you will be admitted to the meeting and your line will be muted. The Chair will ask if anyone wishes to speak on the item. At that time, raise your hand by dialing *9. Then, follow the speaking instructions below.

Speaking Instructions

When it is your turn to speak, the Chair will call your name or the last four digits of the phone number you are calling from. You will have three minutes to address the Committee. **Please ensure all background noise is muted (TV, radio, etc.)** You will be prompted to unmute your microphone/phone. Unmute your device and begin by stating your name. After three minutes has elapsed your microphone will be muted, and the next speaker will be invited to speak.

6:00 P.M.

REGULAR MEETING

NEXT RESOLUTION #717

- 1. CALL TO ORDER/PLEDGE OF ALLEGIANCE**
- 2. ROLL CALL**

3. **AMENDMENTS TO THE AGENDA** - This is the time and place to change the order of the agenda, delete any agenda item(s), or add any emergency agenda item(s).
4. **PRESENTATIONS**
 - A. **Introduction – New Staff**
5. **PUBLIC COMMENT** - In accordance with Government Code Section 54954.3, the Board reserves this time to hear from the public. If you would like to make comments about a matter within the Board’s subject matter jurisdiction but not specifically on this agenda, in accordance with California law, the Board will listen, note the comments, and may bring the comments back up at a later date as an agendized item for discussion. Speakers will be allowed three minutes to address the Board.
6. **CONSENT AGENDA** – Matters listed under the Consent Agenda are considered routine and shall be acted upon without discussion and by one motion. If discussion is desired, the item will be removed from the Consent Agenda for discussion and voted on as a separate item. If no discussion is desired, then the suggested action is for the Chair to request that a motion be made to approve the Consent Agenda.
 - A. **Minutes for Regular Board Meeting of June 1, 2022 and Special Board Meeting of June 8, 2022**

Approval receives and files minutes.
 - B. **Warrants, Accounts Payable & Payroll**

District's disbursements dated on or before May 31, 2022.
 - C. **Financial Reports**

Monthly unaudited financial reports are presented to the Board for information. Approval receives and files the financial reports for May 2022.
 - D. **Review and Approval of Surplus Supplies and Equipment List**

The Board can review the current equipment list provided for the uniform disposal of District owned surplus personal property.
 - E. **Consideration and Adoption of Resolution No. 714 for Appropriation Amount Subject to Gann Limitation, FY 2022-2023**

Every fiscal year staff brings a resolution requesting that the Board adopt a resolution setting the Gann Limit for the upcoming Fiscal Year.
 - F. **Consideration and Approval of Three-Year Agreement between the Pleasant Valley Recreation and Park District and Freedom Park BMX Raceway, Inc. for the Operation of the BMX Track**

The proposed length of the Agreement is three (3) years beginning September 2022 and expiring August 2025.
 - G. **Review and Approve Updated Job Descriptions**

The Recreation Department’s job descriptions have been updated to exclude redundancies and minimize the need for outdated duties.
 - H. **Consideration and Approval of Request for Proposals for an Employee Classification and Compensation Study**

It is considered a best practice to conduct an agency wide employee classification and compensation study every five to seven years.
 - I. **Consideration and Adoption of Resolution No. 715 Declaring July as Park and Recreation Month**

Each year, the Board has chosen to recognize the value and importance of recreation and parks as a cornerstone to the health and wellness of residents.

J. Consideration and Adoption of Resolution No. 716 Proclaiming a Local Emergency Persists and Re-Authorizing the Use of Remote Teleconference Meeting Procedures by the Board of Directors and All Standing Committees of the District for the 30-Day Period Beginning July 6th, 2022 through August 5th, 2022 Pursuant to the Ralph M. Brown Act as Amended by Assembly Bill No. 361

Adoption of Resolution No. 716 will allow continuation of the use of teleconference meeting procedures for another 30-day period.

7. PUBLIC HEARING

A. Consideration and Approval of Resolution No. 717 for Fiscal Year 2022-2023 Budgets for the General Fund, the Assessment District, Quimby Fee Fund, Park Impact Fee Fund and Community Development Block Grant Fund

A public hearing is required before the District can adopt a resolution to adopt the Fiscal Year 2022-2023 budgets.

Suggested Actions: A MOTION to Adopt Resolution No. 717 to adopt the Fiscal Year 2022-2023 Budgets.

8. NEW ITEMS – DISCUSSION/ACTION

A. Consideration and Approval of the Design Plans for the Pickleball Complex at Freedom Park

Staff is presenting two design plans of the Freedom Park Pickleball Complex for Board consideration.

Suggested Actions: A MOTION to Approve the design plans for the Pickleball Complex at Freedom Park.

B. Consideration and Approval of an Agreement between the Pleasant Valley Recreation and Park District, Camarillo PONY Baseball and United States Specialty Sports Association

The Pleasant Valley Recreation and Park District (District) is entering into a new agreement with Camarillo PONY Baseball Association (CPBA) and United States Specialty Sports Association (USSSA) for the use of the baseball fields at Freedom Park and Bob Kildee Park.

Suggested Action: A MOTION to Approve and authorize the District General Manager to enter into a new agreement with Camarillo PONY Baseball Association (CPBA) and United States Specialty Sports Association (USSSA) for the use of the baseball fields at Freedom Park and Bob Kildee Park that outlines the relationship between the District, CPBA and USSSA.

C. Consideration and Approval of an Agreement between the Pleasant Valley Recreation and Park District and FM3 Research to Perform a Voter Opinion Survey

After thorough review of four submitted proposals, the City of Camarillo Liaison Committee recommended FM3 Research for a Voter Opinion Survey.

Suggested Actions: A MOTION to Approve and authorize the General Manager to enter into an agreement with FM3 Research to perform a Voter Opinion Survey not to exceed \$35,000.

D. Consideration and Approval of Full-Time and Part-Time Year-Round Salary Schedule

The salary schedule is typically updated when job classifications are added or changed, if there is an adjustment made in minimum wage, or when the Board awards a COLA.

Suggested Action: A MOTION to Approve the updated 2022/2023 Salary Schedule which includes the 2% COLA for both represented and non-represented employees.

E. Consideration and Approval of Camarillo Grove Park Septic Tank Removal and Replacement

Failure of a septic tank at one of the Camarillo Grove Park restrooms will require the installation of a new septic system.

Suggested Action: A MOTION to Approve and authorize the General Manager to enter into an agreement with ACCO for the installation of a new septic system at the lower restrooms at Camarillo Grove Park in the amount of \$72,605.21 with a 15% contingency for a total not to exceed \$83,496 and allow a one-week closure of the entire park.

F. Consideration and Approval of the Designs of Turf Removal Sites

Due to recent drought conditions and water restrictions, the District has identified six parks where passive use turf areas can be removed. The first phase will focus on Valle Lindo, Lokker, Bob Kildee, and Community Center Parks.

Suggested Action: A MOTION to Approve the proposed turf removal designs for Valle Lindo, Lokker, Bob Kildee, and Community Center Parks.

9. ORAL COMMUNICATION - INFORMATIONAL ITEMS, which do not require action but relate to District business, will be reported by members of the Board and staff as follows:

- A. Chair Kelley
- B. Ventura County Special District Association/California Special District Association
- C. Ventura County Consolidated Oversight Board
- D. Santa Monica Mountains Conservancy
- E. Standing Committees – Finance, Liaison, Long Range Planning, Personnel and Policy
- F. Ad Hoc Committees –City of Camarillo Liaison, Miracle League, Pickleball/Tennis
- G. Foundation for Pleasant Valley Recreation and Parks
- H. General Manager’s Report
- I. Board Members

10. ADJOURNMENT

Notes: The Board of Directors reserves the right to modify the order in which agenda items are heard. Written materials related to these agenda items are available for public inspection in the Office of the Clerk of the Board located at 1605 E. Burnley Street, Camarillo during regular business hours beginning the Friday preceding the Wednesday Board meeting.

Announcement: Public Comment: Members of the public may address the Board on any agenda item before or during consideration of the item. [Government Code section 54954.3] Should you need special assistance (i.e. a disability-related modification or accommodations) to participate in the Board meeting or other District activities (including receipt of an agenda in an appropriate alternative format), as outlined in the Americans With Disabilities Act, or require further information, please contact the General Manager at 482-1996, extension 114. Please notify the General Manager 48 hours in advance to provide sufficient time to make a disability-related modification or reasonable accommodation.

**Pleasant Valley Recreation and Park District
Camarillo City Hall Council Chambers
Minutes of Regular Meeting
June 1, 2022**

6:00 P.M.

REGULAR MEETING

1. CALL TO ORDER/PLEDGE OF ALLEGIANCE

2. ROLL CALL

Present: Directors Magner, Dransfeldt, Malloy and Chair Kelley

Absent: Director Roberts

Also Present: General Manager Mary Otten, Administrative Services Manager Leonore Young, Park Services Manager Bob Cerasuolo, Recreation Services Manager Katlyn Simber-Clickener, Administrative Analyst/Clerk of the Board Dylan Gunning, Customer Service Lead/Recording Board Secretary Karen Roberts, Administrative Analyst Jessica Puckett, Recreation Supervisors Lanny Binney and Macy Trueblood, Park Supervisors Nick Marienthal and Brandon Lopez, Customer Service Representative Bridgett Gagnon, Development Analyst Kaleen Gage, and Marketing Specialist Tina Williamson.

3. AMENDMENTS TO THE AGENDA

Chair Kelley called for a motion. A motion was made by Director Magner and seconded by Director Malloy to accept the agenda as presented.

**Motion to
Approve the
Agenda as
Presented**

Voting was as follows:

Ayes: Magner, Malloy, Dransfeldt, Chair Kelley

Noes:

Absent: Roberts

Carried

Motion: Carried

4. PRESENTATIONS

A. District Highlights

Recreation Supervisor Macy Trueblood presented the upcoming highlights of classes, programs, job and volunteer opportunities, the Arneill Ranch Park grand reopening and special events offered for the summer season at the District.

B. Introduction – Development Analyst Kaleen Gage and Marketing Specialist Tina Williamson

Recreation Services Manager Katlyn Simber-Clickener introduced Development Analyst Kaleen Gage and Marketing Specialist Tina Williamson to the Board.

C. Introduction – Customer Service Representative Brigitte Gagnon
Administrative Analyst Dylan Gunning introduced Customer Service Representative Brigitte Gagnon to the Board.

5. PUBLIC COMMENT

No comments.

6. CONSENT AGENDA

- A. Minutes for Regular Board Meeting of May 4, 2022 and Special Board Meetings of April 23, 2022 and May 10, 2022
- B. Warrants, Accounts Payable & Payroll
- C. Financial Reports
- D. Consideration and Approval of Resolution No. 710 Updating Authorized Signatures for Wire Transfers with Ventura County Treasury Pool
- E. Approval of Purchase of Materials to Complete the Energy Efficiency Measures in Accordance with the Energy Conservation Assistance Act Loan
- F. First Amendment for Contract Services Agreement for General Legal Services with the Law Firm of Aleshire & Wynder, LLP
- G. Consideration and Adoption of Resolution No. 711, Proclaiming a Local Emergency Persists and Re-Authorizing the Use of Remote Teleconference Meeting Procedures by the Board of Directors and all Standing Committees of the District for the 30-Day Period Beginning June 2nd, 2022 through July 3rd, 2022 Pursuant to the Ralph M. Brown Act as Amended by Assembly Bill No. 361
- H. Consideration and Approval to Extend the Tree Trimming Contract between the District and West Coast Arborist for a Term of One Year

Chair Kelley called for a motion. A motion was made by Director Magner and seconded by Director Malloy to approve the Consent Agenda.

Voting was as follows:

Ayes: Magner, Malloy, Dransfeldt, Chair Kelley

Noes:

Absent: Roberts

Motion: Carried

**Motion to
Approve
Consent
Agenda**

Carried

7. PUBLIC HEARING

A. Consideration and Adoption of Resolution No. 712, Approving Engineer’s Report, Confirming Diagram and Assessment, and Ordering Levy of Assessments for FY 2022-2023 for the Park Maintenance and Recreation Improvement District for the Pleasant Valley Recreation and Park District

Administrative Services Manager Leonore Young presented consideration of Resolution No. 712 which would approve SCI Consulting Group’s Engineer Report and allow for the ordering a levy of assessments for FY 22-23. Jeanette Hyson with SCI was on the phone for any questions. The increase from last year will be \$1.31.

Chair Kelley opened the public hearing. He asked if there were any written protests or if anyone wanted to speak for or against the proposed assessments. With no members of the public speaking for or against the proposed assessments, Chair Kelley closed the public hearing.

Chair Kelley called for a motion. A motion was made by Director Malloy and seconded by Director Magner to adopt Resolution No. 712 accepting the Engineer's Report and ordering the levy of assessments at \$44.83.

**Motion to
Adopt Reso
712
Accepting
Engineer's
Report and
Assessment**

Voting was as follows:

Ayes: Malloy, Magner, Dransfeldt, Chair Kelley

Noes:

Absent: Roberts

Motion: Carried

Carried

8. NEW ITEMS – DISCUSSION/ACTION

A. Consideration and Approval of Preliminary Fiscal Year 2022-2023 Budgets for the General Fund, Assessment District Fund, Quimby Fee Fund, Park Impact Fee Fund and Community Development Block Grant Fund

Administrative Services Manager Leonore Young presented the preliminary FY 22-23 budgets. Discussion included: budget adjustment as *Be Water Wise* rebates come in for turf mitigation; Quimby funds and park impact fees that help to offset cost of increased population but do not completely cover ongoing costs; capital projects as a good sign of overall District health; allocation for Freedom Park pickleball complex; request to remove Freedom Dog Park project due to increased maintenance and stretched thin park staff; and need to reduce turf impact at Springville Dog Park and allow for a dog park with lights for early evening usage.

Chair Kelley called for a motion. A motion was made by Director Magner and seconded by Director Malloy to approve the preliminary fiscal year 2022-2023 budget.

**Motion to
Approve
Prelim 22-23
Budget**

Voting was as follows:

Ayes: Magner, Malloy, Chair Kelley

Noes: Dransfeldt

Absent: Roberts

Motion: Carried

Carried

B. Consideration and Approval of Resolution No. 713 Adopting a District Purchasing Policy

Administrative Services Manager Leonore Young presented the District Purchasing Policy which updates the purchasing maximums and single purchase limits for the General Manager and staff. The updates reference the Public Contracts Code and policy information from CSDA.

Chair Kelley called for a motion. A motion was made by Director Magner and seconded by Director Malloy to adopt Resolution No. 713, adopting a District Purchasing Policy.

Motion to Adopt Reso 713, Purchasing Policy

Voting was as follows:

Ayes: Magner, Malloy, Dransfeldt, Chair Kelley

Noes:

Absent: Roberts

Motion: Carried

Carried

C. Consideration and Approval to Authorize the General Manager to Enter into an Agreement with Utility Cost Management LLC

Administrative Analyst Dylan Gunning presented the findings of Utility Cost Management LLC's recent review of the District's utility bills to locate potential savings. Discussion included: possible electricity cost savings at Bob Kildee Park and PV Fields; potential to possibly switch some parks to a lower rate of Schedule AL-2; and presentation of rate change request by UCM to SCE with a possible second review by SCE.

Chair Kelley called for a motion. A motion was made by Director Magner and seconded by Director Dransfeldt to approve and authorize the General Manager to enter into an agreement with Utility Cost Management LLC to submit the rate change request to SCE and pay UCM 42% of any ongoing savings actually realized by PVRPD for a period of three years beginning on the date the account is converted to the newly assigned rate.

Motion to Approve UCM Agreement

Voting was as follows:

Ayes: Magner, Dransfeldt, Malloy, Chair Kelley

Noes:

Absent: Roberts

Motion: Carried

Carried

D. Consideration and Approval to Authorize the General Manager to Purchase a Tuff Shed to Replace the Garage Structure at Camarillo Grove Park for a Nature Education Classroom

Recreation Services Manager Katlyn Simber-Clickener proposed the purchase of a Tuff Shed to replace the garage structure at Camarillo Grove Park. Discussion included: sturdiness of structure against woodpeckers, rodents and snakes; weather sealing the doors and preservation of a small area of garage for display of woodpecker holes.

Chair Kelley called for motion. A motion was made by Director Magner and seconded by Director Dransfeldt to approve and authorize the General Manager to purchase a Tuff Shed to replace the garage structure at Camarillo Grove Park for a Nature Education Classroom.

Motion to Purchase Tuff Shed for Cam Grove Park

Voting was as follows:

Ayes: Magner, Dransfeldt, Malloy, Chair Kelley

Noes:

Absent: Roberts

Motion: Carried

Carried

9. ORAL COMMUNICATION - INFORMATIONAL ITEMS

A. Chair Kelley – Chair Kelley stated that it may look like there is a large amount of money in Quimby funds, but they cannot be spent on general items and are earmarked for certain park improvements. Mr. Kelley asked that community members pay attention to the water restriction mandates that are being instated and that hopefully the investment in park lands will not be severely affected by water mitigation efforts. He asked why the state has not focused on water storage. Regarding the District’s preliminary FY 22-23 budget, staff and the Board have been analyzing and working on the budget for months. Mr. Kelley stated that the cost of a new senior center and gymnasium which are needed in the community is enormous and the District will need assistance with a budget of \$7.6 million and \$400,000 which is taken out for redevelopment fees every year by the City.

B. Ventura County Special District Association/California Special District Association – VCSDA – Director Magner stated that there is a meeting coming up on June 7. CSDA - Director Magner reported that May was very busy with the revised state budget, Legislative Days in Sacramento and many bills for which to consider positions.

C. Ventura County Consolidated Oversight Board – No report.

D. Santa Monica Mountains Conservancy – Director Dransfeldt reported on a May 16 meeting at the King Gillette Ranch in Calabasas. Among the topics discussed was the Ventura County Habitat Connectivity and Wildlife Corridor Overlay Zone.

E. Standing Committees – Finance – Director Malloy stated that interest rates are back up from 0.4% to 5% and that revenues are up from last year. Liaison – City – Director Magner stated that they met with the City on May 26 to evaluate the voter opinion poll. The committee is recommending FM3 Research as the City has worked with them with the airport planning committee. Long Range Planning – Director Dransfeldt stated that they met on May 11 to discuss disc golf and potential sites and were provided an update on the Las Posas Equestrian Park. Personnel – Director Magner stated that there was a May 25 meeting in which they reviewed job position descriptions in recreation and discussed a 2% COLA for the unrepresented. Policy – No meeting.

F. Ad Hoc Committees – Miracle League – Director Malloy stated that the group is getting closer to raising the money needed to start construction. Pickleball – Director Dransfeldt reported on a May 9 meeting with 2 pickleball complex designs presented. Participation level is good, and the committee is still receiving feedback.

G. Foundation for Pleasant Valley Recreation and Parks – Director Magner reported that the Presto Pasta fundraiser brought in \$648. There will be another fundraiser on July 12 with Mr. Softee and on August 19 with Poker for the Parks. There are two vacant spots on the Foundation Board.

H. General Manager’s Report – General Manager Mary Otten reported on current projects and studies that staff are working on. Updates included: a June 8 Special Board Meeting for ADA and User Fee Study; turf removal at Bob Kildee between courts; Arneill Ranch Park grand reopening on July 9 from 9 a.m. to 11 a.m. with restrooms to be delivered in late July or early August; water/turf mitigation with a 30% water reduction with some turf mitigation and some parks watered 2 days a week to accommodate various irrigation heads; no reduction in water at PV Fields because it has reclaimed water; PV Fields closed beginning June 6 for aeration and rest; COVID bill - SB1751 - two more years have been added to the sunset date for workers comp and claims; and AB1883 – for which districts will need to inventory permanent outdoor public restrooms by July 2023 to let the homeless know where the restrooms are.

I. Board Members – The Directors updated on the meetings and District events attended.

Director Dransfeldt wished everyone a happy first day of Pride Month and mentioned an event at Pitts Ranch Park on June 26. Ms. Dransfeldt encouraged people to vote in the June 7 primary elections. Chair Kelley stated that the only gymnasiums in Camarillo are owned by the school district. In order to fund a new senior center and gymnasium, the District may have to go to a bond or a revenue measure. Chair Kelley stated that the District's budget is tight and will need assistance for these facilities.

10. ADJOURNMENT

Chair Kelley adjourned the meeting at 8:14 p.m.

Respectfully submitted,

**Karen Roberts
Recording Secretary**

Approval,

**Robert Kelley
Chair**

**Pleasant Valley Recreation and Park District
Administrative Building, Room #6
Minutes of Special Meeting
June 8, 2022**

6:00 P.M.

SPECIAL MEETING

1. CALL TO ORDER

2. PLEDGE OF ALLEGIANCE

3. ROLL CALL

All present.

Also Present: General Manager Mary Otten, Administrative Services Manager Leonore Young, Park Services Manager Bob Cerasuolo, Recreation Services Manager Katlyn Simber-Clickener, Administrative Analyst/Clerk of the Board Dylan Gunning, Customer Service Lead/Recording Board Secretary Karen Roberts, Administrative Analyst Jessica Puckett, Recreation Supervisors Lanny Binney and Macy Trueblood, Park Supervisor Brandon Lopez, Terry Madsen, Tim Mahoney, and Jennie Grover.

4. ADOPTION OF AGENDA

Chair Kelley called for a motion. A motion was made by Director Malloy and seconded by Director Magner to accept the agenda as presented.

Voting was as follows:

Ayes: Malloy, Magner, Dransfeldt, Roberts, Chair Kelley

Noes:

Absent:

Motion: Carried

**Motion to
Accept
Agenda as
Presented**

Carried

5. OPEN COMMUNICATIONS/PUBLIC FORUM

No comments.

6. CONSENT AGENDA

A. Review and Approval of Surplus Supplies and Equipment List

Chair Kelley called for a motion. A motion was made by Director Magner and seconded by Director Roberts to approve the Consent Agenda.

Voting was as follows:

Ayes: Magner, Roberts, Dransfeldt, Malloy, Chair Kelley

Noes:

Absent:

Motion: Carried

**Motion to
Approve
Consent
Agenda**

Carried

7. NEW ITEMS – DISCUSSION/ACTION

A. 2022 User Fees & Cost Recovery Study Presentation and Discussion

General Manager Mary Otten introduced Terry Madsen, President and Principal Consultant with ClearSource Financial Consulting who provided a presentation regarding the preliminary cost of service analysis to be used as the basis for creating a cost recovery methodology and policy. Presented was a Cost Recovery Benefit Tier with 6 levels from Level 1 with a 0% cost recovery for an entirely community benefit to Level 6 with a 91% – 100% cost recovery for an exclusive individual benefit. Community benefitted programs tend to be covered by public money received from taxes, etc. whereas individual benefitted programs would have more costs recovered from user fees. Discussion included: challenges of determining benefit; need to know full cost of service with increasing costs and limited resources; setting a fee to align with the benefit; current District cost recoveries from 9% to 36%; need to see full costs including cost of facility maintenance; possible changes to be made can be uniform or adaptive depending on the program; pool use and programs different from sports field use; looking at regional costs and user fees in assessing rational target levels; broad concepts and possible solutions; collaborative relationship of CSO's and inconsistencies with contributions of some groups; California Association of Recreation and Park Districts (CARPD) analysis of benefit determinations and levels; need for public education so the community understands what is at stake; and need for public input from local community as next steps.

B. Review of Americans with Disabilities Act Self-Evaluation and Transition Plan for the District

General Manager Mary Otten introduced Tim Mahoney, General Manager of Disability Access Consultants (DAC) and Jennie Grover, Director of DAC's Administrative Services who were available by phone. DAC was contracted to conduct a comprehensive accessibility review of all the District programs, services, activities, policies, buildings, parks and public rights-of-way in order to develop an updated Pleasant Valley Recreation and Park District ADA/504 Self-evaluation and Transition Plan. The Executive Summary details ADA accessibility findings and recommendations for the District. Discussion included: methodology which included onsite field surveys which began in November 2021; input from about 80 public responses and 29 District staff members from a public survey; DACTrak accessibility management software; prioritization for findings and need to show progress; accessibility of the District's website and quality issues with older documents that were scanned; *Streamline* website builder working with CAPRI; consideration of paths of travel from parking lot to the individual programs; and next steps to include addressing and prioritizing the recommendations.

Chair Kelley called for a motion. A motion was made by Director Magner and seconded by Director Malloy to approve to file the 2022 ADA/504 Self-Evaluation and Transition Plan and Executive Summary.

Voting was as follows:

Ayes: Magner, Malloy, Dransfeldt, Roberts, Chair Kelley

Noes:

Absent:

**Motion to
Approve
ADA Exec.
Summary**

Motion: Carried

Carried

8. ADJOURNMENT

Chair Kelley adjourned the meeting at 9:07 p.m.

Respectfully submitted,

Approval,

**Karen Roberts
Recording Secretary**

**Robert Kelley
Chair**

Pleasant Valley Recreation and Park District
 Finance Report
 May 2022

	Date	Amount	
Accounts Payables:	5/1/2022	\$ 524,401.34	
	Total	\$ 524,401.34	
Payroll (Total Cost):	5/12/2022	\$ 133,212.02	
	5/26/2022	\$ 136,629.49	
	Total	\$ 269,841.51	
Outgoing:Online Payments			
	5/4/2022	\$ 5,115.24	Wex Fuel Payment
	5/4/2022	\$ 31,551.16	PERS Health Insurance Premium
	5/12/2022	\$ 13,768.69	CALPERS - Ret PR 5/12/2022
	5/4/2022	\$ 2,581.37	Guardian
	5/4/2022	\$ 521.25	VSP
	5/4/2022	\$ 1,850.27	Hartford
	5/26/2022	\$ 14,634.73	CALPERS- Ret.-PR-5/26/22
	Total	\$ 70,022.71	
	Grand Total	\$ 864,265.56	

CASH REPORT

	5/31/2022 Balance	5/31/2021 Balance	
Restricted Funds			
Debt Service - Restricted	\$ 140,586.22	\$ 256,423.64	
457 Pension Trust Restricted	\$ 75,280.89	\$ 86,367.67	
Quimby Fee - Restricted	\$ 318,241.19	\$ 411,537.53	
Multi-Bank Securities Restricted	\$ 15,421.14	\$ 15,421.14	
Ventura County Pool - Restricted	\$ 3,055,160.70	\$ 4,543,919.59	
Park Impact Fees	\$ 172,350.46	\$ -	
FCDP Checking	\$ 13,846.66	\$ 13,456.76	
Total	\$ 3,790,887.26	\$ 5,327,126.33	
Semi-Restricted Funds			
Assessment	\$ 1,133,682.44	\$ 1,065,586.21	
Capital Improvement	\$ 1,120,598.92	\$ 38,835.65	
Capital - Vehicle Replacement	\$ 49,843.80	\$ 49,843.80	
LAIF - Capital	\$ 2,482,276.44	\$ 2,320,504.80	
Designated Project	\$ 230,484.00	\$ 16,397.94	
Contingency - Dry Period	\$ 397,645.00	\$ 361,000.00	
Contingency-Compensated Absences	\$ 75,000.00	\$ -	
Contingency-Vehicle Replacement	\$ 30,000.00	\$ 30,000.00	
Contingency - Computer	\$ 20,000.00	\$ 20,000.00	
Contingency - Repair/Oper/Admin	\$ 300,000.00	\$ 200,000.00	
Total	\$ 5,839,530.60	\$ 4,102,168.40	
Unrestricted Funds			
Contingency	\$ 4,083,137.75	\$ 12,227.50	
LAIF/Cal Trust - Contingency	\$ -	\$ 4,045,795.87	
General Fund Checking	\$ 442,215.83	\$ 424,618.80	
Total	\$ 4,525,353.58	\$ 4,482,642.17	
Total of all Funds	\$ 14,155,771.44	\$ 13,911,936.90	\$ 243,834.54

	6/6/2022 Balance	6/30/2021 Balance	
Restricted Funds			
Debt Service - Restricted	\$ 140,586.22	\$ 256,432.07	
457 Pension Trust Restricted	\$ 75,280.29	\$ 83,837.02	
Quimby Fee - Restricted	\$ 318,241.19	\$ 396,418.30	
Multi-Bank Securities Restricted	\$ 15,421.14	\$ -	
Ventura County Pool - Restricted	\$ 3,055,160.70	\$ 4,546,106.60	
Park Impact Fees	\$ 172,350.46	\$ -	
FCDP Checking	\$ 13,846.66	\$ 13,601.61	
Total	\$ 3,790,886.66	\$ 5,296,395.60	
Semi-Restricted Funds			
Assessment	\$ 1,117,969.62	\$ 1,001,601.24	
Capital Improvement	\$ 1,120,598.92	\$ 30,010.02	
Capital - Vehicle Replacement	\$ 49,843.80	\$ 79,843.80	
LAIF - Capital	\$ 2,482,276.44	\$ 4,045,795.87	
Designated Project	\$ 230,484.00	\$ 16,397.94	
Contingency - Dry Period	\$ 397,645.00	\$ 361,000.00	
Contingency-Compensated Absences	\$ 75,000.00	\$ -	
Contingency-Vehicle Replacement	\$ 49,843.80	\$ -	
Contingency - Computer	\$ 20,000.00	\$ 20,000.00	
Contingency - Repair/Oper/Admin	\$ 300,000.00	\$ 200,000.00	
Total	\$ 5,843,661.58	\$ 5,754,648.87	
Unrestricted Funds			
Contingency	\$ 4,083,137.75	\$ 12,233.00	
LAIF/Cal Trust - Contingency	\$ -	\$ 2,320,504.80	
General Fund Checking	\$ 464,623.20	\$ 185,667.27	
Total	\$ 4,547,760.95	\$ 2,518,405.07	
Total of all Funds	\$ 14,182,309.19	\$ 13,569,449.54	\$ 612,859.65

Bank Reconciliation

Board Audit

User: cwebster
 Printed: 06/07/2022 - 8:35AM
 Date Range: 05/01/2022 - 05/31/2022
 Systems: 'AP'



Check No.	Vendor/Employee	Transaction Description	Date	Amount
Fund: 10 General Fund				
Department: 00 Non Departmentalized				
25296	CAMARILLO ROTARY CLUB	CAMARILLO ROTARY CLUB: CON	05/26/2022	300.00
25310	TOM TREJO	TREJO, T: DEPOSIT RENTAL REFU	05/26/2022	50.00
25312	US BANK CM-9690	US BANK: ADMIN LOAN FEES 4/1	05/26/2022	1,962.50
Total for Department: 00 Non Departmentalized				2,312.50
Department: 03 Recreation				
0	SUPER SOCCER STARS	SUPER SOCCER STARS: WINTER-	05/19/2022	4,258.80
0	DEBRA GREENWOOD	GREENWOOD, D: WATER EXERCI	05/05/2022	833.30
0	KATIE SHINDEN	SHINDEN,K: 2022-4/12 - 30 CLASSI	05/05/2022	928.20
0	KATIE SHINDEN	SHINDEN,K: 2022-MAY	05/19/2022	1,220.60
0	PATRICIA J. BOLLAND	BOLLAND,P: 5 & 10 DAY PASS	05/05/2022	565.50
25232	AMERICAN RED CROSS	AMERICAN RED CROSS: ONLINE	05/05/2022	28.00
25242	THOMAS COSTA	COSTA, T: PICKLEBALL ROUND R	05/05/2022	458.25
25244	CLIFTON G. GORE JR.	GORE,C: BEGINNING & ADVANCI	05/05/2022	2,925.00
25246	DANIEL E. HOWARD	HOWARD,D: JUJITSU KIDS/ADUL	05/05/2022	228.80
25258	AUDREY WALZER	WALZER, A: ADULT YOGA	05/05/2022	998.40
25259	DUNCAN YOUNG	YOUNG,D: TOT & BEGINNERS GY	05/05/2022	1,069.90
25260	YOUTH EVOLUTION ACTIVITIES	YOUTH EVOLUTION ACTIVITIES:	05/05/2022	3,199.30
25263	ALL GOOD DRIVING SCHOOL, INC	ALL GOOD DRIVING: 2022 APRIL	05/19/2022	27.30
25265	AMERICAN RED CROSS	AMERICAN RED CROSS: ADULT&	05/19/2022	420.00
25268	MICHAEL ASHLEY	ASHLEY, M: BEG/INTER/ADV/PIC	05/19/2022	1,989.00
25281	BRYAN MONKA	MONKA, B: APRIL 2022 CLASSES	05/19/2022	586.95
25282	LUCILE B. MOSIER	MOSIER,L: MODERN TENNIS CLA	05/19/2022	812.50
25284	ROLANDO RESTREPO	RESTREPO, R: 4/15/2022 GAME	05/19/2022	30.00
25285	ROBERT RUTHERFORD	RUTHERFORD,R: 2022-4/13 GAME	05/19/2022	60.00
25286	MARIO SANCHEZ	SANCHEZ,M: FORFEIT FEE 2022-4	05/19/2022	280.00
Total for Department: 03 Recreation				20,919.80
Department: 04 Parks				
0	ARAMSCO INC.	ARAMSCO: LINER / MISSION OAK	05/03/2022	5,066.14
0	ARAMSCO INC.		05/17/2022	1,035.14
0	ARAMSCO INC.	ARAMSCO: BLACK LINER / COM	05/26/2022	2,458.14
0	CITY OF CAMARILLO	CITY OF CAM: SERVICE DATE 202	05/05/2022	37,843.44
0	E.J.HARRISON AND SONS, INC.	E H HARRISON: APRIL 2022 BILLI	05/03/2022	4,459.31
0	E.J.HARRISON AND SONS, INC.	EJ HARRISON: MAY 2022 BILLING	05/26/2022	4,459.31
0	FERGUSON ENTERPRISES INC. #1	FERGUSON: GAS PIPE TAPE / COM	05/03/2022	73.91
0	FERGUSON ENTERPRISES INC. #1	FERGUSON: DIAPH KIT / FREEDO	05/17/2022	674.47
0	GAMETIME	GAMETIME: SPRIRAL SLIDE/ CAM	05/05/2022	22,226.82
0	GRAINGER	GRAINGER: ENTRANCE CARPET	05/03/2022	169.87
0	SOCAL GAS COMPANY	SCG: SERVICE DATE 2022-3/29 - 4/	05/05/2022	3,577.18
0	SOUTHERN CALIF EDISON COMP.	SCE: SERVICE DATE 2022-3/31 - 5/	05/05/2022	4,346.40
0	SOUTHERN CALIF EDISON COMP.	SCE: SERVICE PERIOD 2022-4/4 - 5	05/17/2022	11,628.36
0	UNITED SITE SERVICES OF CA IN	UNITED SITE: ADA RESTROOM / S	05/03/2022	1,175.18
0	UNITED SITE SERVICES OF CA IN	UNITED SITE: ADA RR/ HAND SIN	05/17/2022	185.36
0	UNITED SITE SERVICES OF CA IN	UNITED SITE: DELUXE RR / WEEF	05/26/2022	153.26
0	WATER & SANITATION SERVICES	W&S: SERVICE DATE 2022-3/31 - 4	05/17/2022	446.90
0	BRANDON LOPEZ	LOPEZ, B: REIMB FOR PANTS	05/05/2022	186.35

Check No.	Vendor/Employee	Transaction Description	Date	Amount
0	JOHN FLETCHER	FLETCHER,J: BOOTS REIMB	05/26/2022	200.00
0	MICHAEL GUERRERO	GUERRERO, M: WORK BOOTS RE	05/05/2022	200.00
25228	ADVANCED SANITATION	ADVANCED SANITATION: PUMP C	05/05/2022	590.00
25231	AMERICAN AUTOMATIC DOORS I	AMERICAN AUTOMATIC DOORS:	05/05/2022	144.90
25233	B & B DO IT CENTER	B&B: REPAIR URINALS/ PV FIELD	05/05/2022	306.57
25237	CAL-COAST MACHINERY INC.	CAL-COAST MACHINERY: CLUTC	05/05/2022	9,442.97
25238	CALIFORNIA ELECTRIC COMPAN	CALIFORNIA ELECTRIC CO: EXTI	05/05/2022	281.25
25239	CAMARILLO LAWNMOWER	CAMARILLO LAWNMOWER: CHA	05/05/2022	216.37
25241	CITY OF OXNARD	CITY OF OXNARD: MARCH 2022 E	05/05/2022	526.99
25243	COUNTY OF VENTURA	COUNTY OF VENTURA: REPORT 7	05/05/2022	12.50
25245	GRAINGER	GRAINGER: RETURNED ENTRAN	05/05/2022	91.65
25249	NAPA AUTO PARTS	NAPA: TRUCK# 29 BATTERY	05/05/2022	150.36
25252	PHOENIX GROUP INFORMATION ;	PHOENIX GROUP: STATEMENT 02	05/05/2022	285.16
25254	SITEONE LANDSCAPE SUPPLY LI	SITEONE: RAIN BIRD / SOCKET / S	05/05/2022	857.46
25257	TURF STAR INC.	TURF STAR: SAND PRO / SHOP	05/05/2022	937.26
25266	AMERICAN RESOURCE RECVY	AMERICAN RESOURCE RECVY: 2	05/19/2022	947.39
25267	ANGEL PLUMBERS INC	ANGEL PLUMBERS INC: SEWER V	05/19/2022	250.00
25269	B & B DO IT CENTER	B&B: BOLLARD POST/PV FIELDS	05/19/2022	365.30
25270	BIGBRAND TIRE & SERVICE	BIG BRAND TIRE: TRUCK#13	05/19/2022	422.51
25272	COASTAL PIPCO IRRIGATION INC	CAOSTAL PIPCO: VALVE /PVC 80 /	05/19/2022	94.09
25273	CRESTVIEW MUTUAL WATER CO.	CRESTVIEW MUTUAL WATER: 20:	05/19/2022	54.00
25274	DIAL SECURITY	DIAL SECURITY: 2020/3-17 EVENT	05/19/2022	174.00
25275	FENCE FACTORY RENTALS	FENCE FACTORY: GATE REPAIR/ I	05/19/2022	19.62
25277	KASTLE KARE	KASTLE KARE: GOPHER MONTHI	05/19/2022	600.00
25280	LESLIE'S POOL SUPPLIES INC.	LESLIE'S POOL: CHLORINE NEUT	05/19/2022	67.91
25283	NAPA AUTO PARTS	NAPA: AIR & OIL FILTERS	05/19/2022	90.05
25287	SITEONE LANDSCAPE SUPPLY LI	SITEONE: NOZZLE / PIPE CUTTER	05/19/2022	2,094.81
25291	AGRI-TURF DISTRIBUTING LLC	AGRI-TURF: ANNUAL WORKER S	05/26/2022	50.00
25292	B & B DO IT CENTER	B&B: MOUNTING TAPE / COMM C	05/26/2022	286.58
25294	BIGBRAND TIRE & SERVICE	BIGBRAND: TIRES	05/26/2022	598.14
25295	BLACK GOLD INDUSTRIES	BLACK GOLD INDUSTRIES: HAZ/	05/26/2022	4,189.68
25297	CAMROSA WATER DISTRICT	CAMROSA: BILLING DATE 2022-3-	05/26/2022	9,140.01
25298	COUNTY OF VENTURA	COUNTY OF VENTURA DEPT OF /	05/26/2022	1,517.00
25299	DIAL SECURITY	DIAL SECURITY: 2022-5/7 / CONTI	05/26/2022	348.00
25300	DOG WASTE DEPOT	DOG WASTE DEPOT: 30 ROLL CAS	05/26/2022	7,866.40
25302	GRAINGER	GRAINGER: LIGHTS / FREEDOM C	05/26/2022	142.92
25305	JACOB LUKIEWSKI M3 CIVIL	M3 CIVIL: BILLING PERIOD 2022-	05/26/2022	875.00
25306	NAPA AUTO PARTS	NAPA: TRAILER WIRE	05/26/2022	59.85
25307	SITEONE LANDSCAPE SUPPLY LI	SITEONE: RAINBIRD / VALVE / FR	05/26/2022	1,628.66
25309	TRAFFIC TECHNOLOGIES LLC.	TRAFFIC TECHNOLOGIES: SIGNS	05/26/2022	251.49
25311	U-RENT INC.	U RENT: THATCHER / FREEDOM I	05/26/2022	151.96

Total for Department: 04 Parks

146,694.35

Department: 05 Administration

0	ALESHIRE & WYNDER LLP	ALESHIRE & WYNDER: LEGAL SE	05/19/2022	3,319.30
0	GAMETIME	GAMETIME: PLAYGROUND/ ARN	05/05/2022	210,786.81
0	QUADIANT FINANCE USA INC.	QUADIANT FINANCE: POSTAGE	05/26/2022	231.93
0	QUADIANT LEASING USA, INC.	QUADIANT: PROP TAX ON LEASE	05/03/2022	65.69
0	STREAMLINE	STREAMLINE: BILLING DATE 202	05/05/2022	300.00
0	STREAMLINE	STREAMLINE: 2022-5/1 - 6/1	05/19/2022	300.00
0	WATER & SANITATION SERVICES	W&S: PROCESSING FEE MAY PM1	05/17/2022	0.75
25229	ADVANTAGE TELECOM/A+WIREI	ADVANTAGE TELECOM: BILLING	05/05/2022	1,490.24
25230	ALLCONNECTED, INC.	ALLCONNECTED: 2022-MAY MON	05/05/2022	1,976.00
25234	BAY ALARM	BAY ALARM: SERVICE DATE 2022	05/05/2022	330.00
25240	CENTERS FOR FAMILY HEALTH	CENTERS FOR FAMILY HEALTH: S	05/05/2022	180.00
25250	NATIONAL DEMOGRAPHICS, INC.	NATIONAL DEMOGRAPHICS: REI	05/05/2022	29,500.00
25253	PUBLIC RESTROOM COMPANY	PUBLIC RESTROOM CO: PROGRE	05/05/2022	46,463.00
25255	STATE OF CALIFORNIA DEPT. OF	STATE OF CA DEPT OF JUSTICE: 2	05/05/2022	32.00
25256	CODY SWANSON	SWANSON,C: 2022-4/9 HIKE	05/05/2022	62.50
25262	ACCU-PRINTS/M&L PARTNERSHII	ACCU-PRINTS: 2022-APRIL / CAST	05/19/2022	30.00
25264	ALLCONNECTED, INC.	ALLCONNECTED: MONTHLY BILJ	05/19/2022	210.00
25271	CENTERS FOR FAMILY HEALTH	CENTERS FOR FAMILY HEALTH: S	05/19/2022	440.00

Check No.	Vendor/Employee	Transaction Description	Date	Amount
25276	J. THAYER COMPANY	J THAYER: FOLDER/PEN/PORTOLI	05/19/2022	291.98
25278	KONICA MINOLTA	KONICA MINOLTA: MONTHLY MA	05/19/2022	45.31
25279	PAUL LERMA	LERMA,P: 2022-5/7 HIKE	05/19/2022	62.50
25288	STATE OF CALIFORNIA DEPT. OF	STATE OF CA - DEPT OF JUSTICE/	05/19/2022	128.00
25289	ANTHONY STRINGER	STRINGER, A: FINGER PRINTING	05/19/2022	21.00
25293	BAY ALARM	BAY ALARM: BILLING PERIOD 20	05/26/2022	405.00
25301	KALEEN GAGE	GAGE, K: ACH DEP RET - ERR ON	05/26/2022	1,991.63
25303	J. THAYER COMPANY	J THAYER: CARTRIDGE	05/26/2022	129.60
25308	DAVID TORFEH	TORFEH, D: 2022-4/23 & 5/14	05/26/2022	100.00
25312	US BANK CM-9690	US BANK: ADMIN LOAN FEES 4/1	05/26/2022	392.50
Total for Department: 05 Administration				299,285.74
Total for Fund:10 General Fund				469,212.39

Check No.	Vendor/Employee	Transaction Description	Date	Amount
Fund: 20 Assessment Fund				
Department: 00 Non Departmentalized				
25235	BRIGHTVIEW LANDSCAPE SERVI	BRIGHTVIEW LANDSCAPE: APRI	05/05/2022	26,635.58
25247	KIRBY BUILT QUALITY PRODUCT	KIRBYBUILT: FREIGHT CHARGE	05/05/2022	185.00
25251	NATURAL GREEN LANDSCAPES,	NATURAL GREEN LANDSCAPE: A	05/05/2022	15,712.82
25313	WEST COAST ARBORISTS INC.	WCA: SERVICE PERIOD 2022- 4/16	05/26/2022	1,800.00
25314	YARD STOCK	YARD STOCK: TREES / SHOP	05/26/2022	1,676.42
Total for Department: 00 Non Departmentalized				46,009.82
Total for Fund:20 Assessment Fund				46,009.82

Check No.	Vendor/Employee	Transaction Description	Date	Amount
Fund: 30 Park Dedication Fund				
Department: 00				
25236	BURNER CONSTRUCTION CORP	BURNER CONSTRUCTION: NPDES	05/05/2022	4,315.73
25248	LAUTERBACH & ASSOCIATES, IN	LAUTERBACH: SERVICES 2022-2/	05/05/2022	2,434.11
25304	LAUTERBACH & ASSOCIATES, IN	LAUTERBACH & ASSOC: BILLINC	05/26/2022	2,429.29
				9,179.13
Total for Department: 00				
				9,179.13
Total for Fund:30 Park Dedication Fund				

Check No.	Vendor/Employee	Transaction Description	Date	Amount
		Grand Total		524,401.34

Ventura County Pool

Investment Name	December 2020	January 2021	February 2021	March 2021	April 2021	May 2021	June 2021	July 2021	August 2021
Ventura County Pool	.518%	.464%	.495%	.410%	.383%	.357%	.361%	.331%	.305%
	September 2021	October 2021	November 2021	December 2021	January 2022	February 2022	March 2022	April 2022	May 2022
Ventura County Pool	.322%	.310%	.300%	.310%	.330%	.38%	.41%	.56%	.67%

• Rates are determined at the end of the month

Local Agency Investment Fund (LAIF)

Investment Name	December 2020	January 2021	February 2021	March 2021	April 2021	May 2021	June 2021	July 2021	August 2021
Local Agency Investment Fund (LAIF)	.540%	.458%	.407%	.357%	.339%	.315%	.262%	.330%	.221%
	September 2021	October 2021	November 2021	December 2021	January 2022	February 2022	March 2022	April 2022	May 2022
Local Agency Investment Fund (LAIF)	.206%	.203%	.202%	.212%	.234%	.278%	.365%	.523%	.684%

Pacific Western Bank

Investment Name	December 2020	January 2021	February 2021	March 2021	April 2021	May 2021	June 2021	July 2021	August 2021
Pacific Western Bank	.04%	.04%	.04%	.04%	.04%	.04%	.04%	.04%	.04%
	September 2021	October 2021	November 2021	December 2021	January 2022	February 2022	March 2022	April 2022	May 2022
Pacific Western Bank	.04%	.04%	.04%	.04%	.04%	.04%	.04%	.04%	.04%

Name Of Account	Fiscal Year 2021/2022												Total 2020/2021 Interest	Total Annual Yield	Total Interest Earned Since Purchased								
	Jul-21	Aug-21	Sep-21	Total 1ST Qtr. Of 2021-2022	Annual Percentage Yield	Oct-21	Nov-21	Dec-21	Total 2ND Qtr. Of 2021-2022	Annual Percentage Yield	Jan-22	Feb-22				Mar-22	Total 3RD Qtr. 2021-2022	Annual Percentage Yield	Apr-22	May-22	Jun-22	Total 4TH Qtr. 2021-2022	Annual Percentage Yield
LAF Capital #1301	\$ 1,710.65	\$ -	\$ -	\$ 1,710.65	0.206%	\$ 1,475.40			\$ 1,475.40	0.21%	\$ 2,427.29			\$ 2,427.29	0.365%				\$ -			\$ 5,613.34	
LAF Contingency #1200	\$ 3,356.28	\$ -	\$ -	\$ 3,356.28	0.206%	\$ 2,005.03			\$ 2,005.03														
Ventura County Pool (Restricted -0241)	\$ 1,812.51	\$ 1,812.51	\$ -	\$ 3,625.02	0.32%	\$ 1,498.24	\$ 1,498.24	\$ -	\$ 2,996.48	0.31%	\$ 1,216.30	\$ 1,216.30		\$ 2,432.60	0.41%				\$ -			\$ 9,054.10	
Ventura County Pool (Unrestricted -0240)				\$ -					\$ -					\$ -					\$ -			\$ -	
CALTRUST	\$ 0.01	\$ 0.01	\$ 0.01	\$ 0.03		\$ 0.01	\$ 0.01	\$ 0.01	\$ 0.03		\$ 0.01			\$ 0.01					\$ -			\$ 0.07	
457 Pension Assessment	\$ 2.85	\$ 2.85	\$ 2.75	\$ 8.45	0.04%	\$ 2.85	\$ 2.76	\$ 2.85	\$ 8.46	0.04%	\$ 2.85	\$ 2.32	\$ 2.56	\$ 7.73	0.04%				\$ -			\$ 24.64	
Capital Contingency	\$ 33.50	\$ 31.98	\$ 29.89	\$ 95.37	0.04%	\$ 20.69	\$ 9.34	\$ 15.70	\$ 45.73	0.04%	\$ 28.09	\$ 24.24	\$ 25.53	\$ 77.86	0.04%				\$ -			\$ 218.96	
Debt Service	\$ 3.93	\$ 3.73	\$ 3.47	\$ 11.13	0.04%	\$ 2.81	\$ 2.89	\$ 14.56	\$ 20.26	0.04%	\$ 163.99	\$ 22.28	\$ 23.79	\$ 210.06	0.04%				\$ -			\$ 241.45	
Quimby	\$ 5.68	\$ 5.68	\$ 5.50	\$ 16.86	0.04%	\$ 5.68	\$ 5.50	\$ 51.71	\$ 62.89	0.04%	\$ 25.48	\$ 137.72	\$ 141.64	\$ 304.84	0.04%				\$ -			\$ 384.59	
	\$ 8.71	\$ 6.06	\$ 4.46	\$ 19.23	0.04%	\$ 4.60	\$ 4.45	\$ 6.23	\$ 15.28	0.04%	\$ 9.18	\$ 7.40	\$ 4.61	\$ 21.19	0.04%				\$ -			\$ 55.70	
	\$ 20.20	\$ 20.20	\$ 12.49	\$ 52.89	0.04%	\$ 3.94	\$ 33.99	\$ 41.34	\$ 79.27	0.04%	\$ 21.79	\$ 15.83	\$ 11.21	\$ 48.83	0.04%				\$ -			\$ 180.99	
Total	\$ 6,954.32	\$ 1,883.02	\$ 58.57	\$ 8,895.91		\$ 5,019.25	\$ 1,557.18	\$ 132.40	\$ 6,708.83		\$ 3,894.98	\$ 1,426.09	\$ 209.34	\$ 5,530.41		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 15,773.84	\$ -

**PLEASANT VALLEY RECREATION AND PARK DISTRICT
STAFF REPORT / AGENDA REPORT**

TO: BOARD OF DIRECTORS

FROM: MARY OTTEN, GENERAL MANAGER
By: Leonore Young, Administrative Services Manager

DATE: July 6, 2022

SUBJECT: FINANCE REPORT MAY 2022

BACKGROUND

Staff is presenting the District's financial report for Fund 10 General Fund, Fund 20 Assessment District Fund, Fund 30 Park Dedication Fund (Quimby Fees), Fund 40, and Fund 50 for the month of May 2022 with a prior year comparison.

ANALYSIS OF COMPARATIVE FINANCIAL THROUGH MAY 31, 2022

The District's Statements of Revenues and Expenditures for the period of July 1, 2021 through May 31, 2022 with a year-to-date comparison for the period of July 1, 2020 through May 31, 2021 are attached. The percentage rate used for the 2021-2022 fiscal year budget is 91% for Period 11 of the fiscal year.

REVENUES

Total revenue for the 11th month ending May 31, 2022 for Fund 10 (General Fund) has an overall increase of \$892,461 in comparison to fiscal year 2020-2021. This variance from prior year is primarily made up of an increase in Other Miscellaneous Revenue #5575 (\$272,319) due to COVID-19 relief funds received, Tax Apportionment #5510-5240 (\$254,581), Rental #5530 (\$197,841) and other accounts with smaller variances.

Total revenue for the 11th month ending May 31, 2022 for Fund 20 (Assessment District) is at 99.6% of budget.

Fund 30, the Park Dedication Fund had no activity for the month of May 2022.

Fund 40, the Park Impact Fee Fund had no activity for the month of May 2022.

Fund 50, the Community Development Block Grant (CDBG) Fund – Food Share had no activity for the month of May 2022.

EXPENDITURES

Personnel Expenditures have increased by \$38,713 for fiscal year 2021-2022 in comparison to personnel expenses for the same time last year.

Service and Supply Expenditures for Fund 10 have increased \$291,228 in comparison to the same time as last year and is at 80.8% of budget. The main line item that makes up most of this variance is Instructor Services #7120 (\$77,696), Professional Services #7100 (\$61,708) and various other accounts.

Fund 20 is at 90.5% in Personnel and 91.2% in Service and Supplies.

Fund 30 had no Personnel Expenses or Services and Supplies for the month of May 2022.

Fund 40 had no activity in Personnel or Services and Supplies for the month of May 2022.

Fund 50 activity in Personnel is at year-to-date \$21,306 and Services and Supplies year-to-date \$847 through the month of May 2022.

The capital projects in Fund 10 (General Fund) and Fund 30 (Quimby Fee Fund) are continuing to make progress.

FISCAL IMPACT

Overall, the financials show the District is under the approved budget for Fund 10 by 15.5% and over in Fund 20 by 0.19%.

RECOMMENDATION

It is recommended the Board review and approve the Financial Statements for May 2022 for Fund 10, Fund 20, Fund 30, Fund 40, and Fund 50.

ATTACHMENTS

- 1) Financial Statement of Revenues and Expenditures as of May 31, 2022, Fund 10
(3 pages)
- 2) Financial Statement of Revenues and Expenditures as of May 31, 2022, Fund 20
(1 page)
- 3) Financial Statement of Revenues and Expenditures as of May 31, 2022, Fund 30
(1 page)
- 4) Financial Statement of Revenues and Expenditures as of May 31, 2022, Fund 40
(1 page)
- 5) Financial Statement of Revenues and Expenditures as of May 31, 2022, Fund 50
(1 page)

General Ledger
Fund 10 General Fund
May 2022 91%

Description	Account	Period Amount	One Year Prior Actual	Year to Date	Budget	Budget Remaining	% of Budget Used
Revenue							
Tax Apport - Cur Year Secured	5110-5240	\$ (63,387.07)	\$ (7,149,124.12)	\$ (7,403,704.89)	\$ (7,301,920.00)	\$ (101,784.89)	101.39%
Interest Earnings	5310	\$ (0.04)	\$ (25,937.72)	\$ (7,874.91)	\$ (14,928.00)	\$ (7,053.09)	52.75%
Hill Fire 2018	5465	\$ -	\$ (219,884.01)	\$ -	\$ -	\$ -	0.00%
Park Patrol Citations	5506	\$ (124.11)	\$ (1,100.00)	\$ (1,277.11)	\$ (2,200.00)	\$ (922.89)	58.05%
Bingo Revenue	5508	\$ (5,160.25)	\$ (521.50)	\$ (10,955.50)	\$ (14,400.00)	\$ (3,444.50)	76.08%
Excess Bingo Funds	5509	\$ -	\$ -	\$ (2,946.60)	\$ -	\$ 2,946.60	0.00%
Contract Classes-Public Fees	5510	\$ (38,039.85)	\$ (91,472.51)	\$ (219,863.22)	\$ (128,380.00)	\$ 91,483.22	171.26%
Public Fees	5511	\$ (49,777.15)	\$ (61,435.19)	\$ (202,099.84)	\$ (200,771.00)	\$ 1,328.84	100.66%
Public Fees-Entry Fees	5520	\$ (3,924.00)	\$ (6,698.00)	\$ (34,470.00)	\$ (25,840.00)	\$ 8,630.00	133.40%
Vending Concessions	5525	\$ -	\$ -	\$ (620.40)	\$ (2,500.00)	\$ (1,879.60)	24.82%
Rental	5530	\$ (45,397.40)	\$ (199,906.56)	\$ (397,747.84)	\$ (285,912.00)	\$ 111,835.84	139.12%
Cell Tower Revenue	5535	\$ (5,313.63)	\$ (89,493.25)	\$ (93,289.18)	\$ (91,704.00)	\$ 1,585.18	101.73%
Parking Fees	5540	\$ (1,658.00)	\$ (9,582.36)	\$ (15,408.55)	\$ (8,512.00)	\$ 6,896.55	181.02%
CAPRI Workers Comp Prior Year	5546	\$ -	\$ -	\$ (15,947.55)	\$ -	\$ 15,947.55	0.00%
Activity Guide Revenue	5555	\$ -	\$ (1,450.00)	\$ (2,550.00)	\$ (10,000.00)	\$ (7,450.00)	25.50%
Sponsorships/Donations	5558	\$ -	\$ (3,565.00)	\$ -	\$ (1,000.00)	\$ (1,000.00)	0.00%
Special Event	5561	\$ -	\$ -	\$ 512.52	\$ -	\$ (512.52)	0.00%
Staffing Cost Recovery	5563	\$ (3,907.00)	\$ (24,093.00)	\$ (49,714.25)	\$ (26,730.00)	\$ 22,984.25	185.99%
Special Event Permits	5564	\$ -	\$ (600.00)	\$ (800.00)	\$ -	\$ 800.00	0.00%
Security Services Recovery	5566	\$ 222.00	\$ -	\$ (4,789.00)	\$ -	\$ 4,789.00	0.00%
Contributions	5570	\$ 1,351.00	\$ (37,239.00)	\$ (72,178.28)	\$ (72,000.00)	\$ 178.28	100.25%
Other Misc Revenue	5575	\$ (3,000.00)	\$ (61,711.21)	\$ (334,030.64)	\$ (304,880.00)	\$ 29,150.64	109.56%
Credit Card Processing Fee	5576	\$ -	\$ (93.79)	\$ (67.75)	\$ -	\$ 67.75	0.00%
Cash Over/Under	5580	\$ -	\$ (166.00)	\$ (45.00)	\$ -	\$ 45.00	0.00%
Incentive Income	5585	\$ (16.88)	\$ (620.68)	\$ (1,594.86)	\$ (2,700.00)	\$ (1,105.14)	59.07%
Reimbursement - ROPS	5600	\$ -	\$ (373,105.94)	\$ (396,407.90)	\$ (325,000.00)	\$ 71,407.90	121.97%
Reimb-Needs Assessment/LPA	5605	\$ -	\$ (17,610.38)	\$ -	\$ -	\$ -	0.00%
Surplus Carryover	5991	\$ -	\$ -	\$ -	\$ (16,397.00)	\$ (16,397.00)	0.00%
Revenue		\$ 218,132.38	\$ 8,375,410.22	\$ 9,267,870.75	\$ 8,835,774.00	\$ (432,096.75)	104.89%
YTD Comparison				\$ 892,460.53			
Personnel							
Full Time Salaries	6100	\$ 176,046.19	\$ 2,077,546.54	\$ 2,033,234.37	\$ 2,504,112.00	\$ 470,877.63	81.20%
Overtime Salaries	6101	\$ 1,640.98	\$ 8,950.83	\$ 14,583.72	\$ 23,594.00	\$ 9,010.28	61.81%
Car Allowance	6105	\$ 882.78	\$ 9,968.88	\$ 10,204.54	\$ 10,800.00	\$ 595.46	94.49%
Cell Phone Allowance	6108	\$ 1,178.34	\$ 12,780.42	\$ 13,100.21	\$ 15,420.00	\$ 2,319.79	84.96%
Part-Time Salaries	6110	\$ 28,000.49	\$ 161,698.21	\$ 321,545.06	\$ 469,895.00	\$ 148,349.94	68.43%
Retirement	6120	\$ 28,660.67	\$ 357,559.53	\$ 338,189.83	\$ 445,014.00	\$ 106,824.17	76.00%
457 Pension	6121	\$ 87.17	\$ 68,524.24	\$ 16,227.92	\$ 7,000.00	\$ (9,227.92)	231.83%
Deferred Compensation	6125	\$ 365.56	\$ 4,259.04	\$ 4,245.43	\$ 4,752.00	\$ 506.57	89.34%
Employee Insurance	6130	\$ 14,913.08	\$ 304,855.28	\$ 195,834.54	\$ 351,958.00	\$ 156,123.46	55.64%
Workers Compensation	6140	\$ 11,613.72	\$ 92,643.00	\$ 137,590.48	\$ 189,304.00	\$ 51,713.52	72.68%
Unemployment Insurance	6150	\$ 6,804.50	\$ 28,430.50	\$ 6,843.91	\$ 40,000.00	\$ 33,156.09	17.11%
Loan - Pension Obligation	6160	\$ 22,018.17	\$ 235,346.83	\$ 242,199.83	\$ 264,218.00	\$ 22,018.17	91.67%
PERS Unfunded Liability	6170	\$ -	\$ 434,065.00	\$ 501,541.00	\$ 516,970.00	\$ 15,429.00	97.02%
Personnel		\$ 292,211.65	\$ 3,796,628.30	\$ 3,835,340.84	\$ 4,843,037.00	\$ 1,007,696.16	79.19%
YTD Comparison				\$ 38,712.54			
Services and Supplies							
Telephone/Internet	6210	\$ 1,490.24	\$ 18,671.87	\$ 19,704.05	\$ 23,008.00	\$ 3,303.95	85.64%
Internet Services	6220	\$ 2,786.00	\$ 17,432.00	\$ 22,433.08	\$ 36,862.00	\$ 14,428.92	60.86%
IT Infrastructure	6230	\$ -	\$ 934.26	\$ 539.62	\$ 2,000.00	\$ 1,460.38	26.98%
Computer Hardware/Software	6240	\$ 304.50	\$ 9,364.39	\$ 10,588.45	\$ 12,050.00	\$ 1,461.55	87.87%
Pool Chemicals	6310	\$ 67.91	\$ 1,904.17	\$ 4,102.14	\$ 8,250.00	\$ 4,147.86	49.72%
Janitorial Supplies	6320	\$ 8,559.42	\$ 29,509.02	\$ 35,755.47	\$ 48,408.00	\$ 12,652.53	73.86%
COVID - Supplies	6321	\$ -	\$ 10,285.84	\$ 80.44	\$ 5,600.00	\$ 5,519.56	1.44%
Kitchen Supplies	6330	\$ -	\$ -	\$ -	\$ 1,000.00	\$ 1,000.00	0.00%
Food Supplies	6340	\$ 168.76	\$ -	\$ 788.17	\$ 12,745.00	\$ 11,956.83	6.18%
Water Maint & Service	6350	\$ -	\$ 850.90	\$ 601.05	\$ 1,265.00	\$ 663.95	47.51%
Laundry/Wash Service	6360	\$ -	\$ 178.00	\$ -	\$ 880.00	\$ 880.00	0.00%
Insurance Liability	6410	\$ -	\$ 208,084.00	\$ 236,698.00	\$ 236,698.00	\$ -	100.00%
Equipment Maintenance	6500	\$ -	\$ 17.15	\$ 141.93	\$ 900.00	\$ 758.07	15.77%
Fuel	6510	\$ 5,622.31	\$ 41,530.72	\$ 48,229.50	\$ 51,600.00	\$ 3,370.50	93.47%
Vehicle Maintenance	6520	\$ 11,786.26	\$ 22,050.89	\$ 34,361.62	\$ 35,400.00	\$ 1,038.38	97.07%
Office Equipment Maintenance	6530	\$ -	\$ 116.89	\$ -	\$ -	\$ -	0.00%
Building Repair	6610	\$ 18,544.71	\$ 50,544.82	\$ 54,346.10	\$ 88,000.00	\$ 33,653.90	61.76%
HVAC	6620	\$ 6.40	\$ 8,065.82	\$ 5,379.87	\$ 8,820.00	\$ 3,440.13	61.00%
Playground Maintenance	6630	\$ 22,226.82	\$ 5,455.65	\$ 26,678.99	\$ 60,000.00	\$ 33,321.01	44.46%
Turf Removal	6705	\$ -	\$ -	\$ 15,206.10	\$ 20,000.00	\$ 4,793.90	76.03%
Grounds Maintenance	6710	\$ 5,695.29	\$ 77,302.01	\$ 76,275.26	\$ 86,220.00	\$ 9,944.74	88.47%
Tree Care	6719	\$ -	\$ 26,528.35	\$ 24,352.50	\$ 30,000.00	\$ 5,647.50	81.18%
Park Amenities - Assess	6722	\$ (6,194.01)	\$ -	\$ 9,005.46	\$ -	\$ (9,005.46)	0.00%

General Ledger
Fund 10 General Fund
May 2022 91%

Description	Account	Period Amount	One Year Prior Actual	Year to Date	Budget	Budget Remaining	% of Budget Used
Fee Schedule	6727	\$ -	\$ -	\$ -	\$ 16,397.00	\$ 16,397.00	0.00%
Contracted Pest Control	6730	\$ 600.00	\$ 760.00	\$ 3,100.00	\$ 2,520.00	\$ (580.00)	123.02%
Rubbish & Refuse	6740	\$ 14,582.68	\$ 63,624.03	\$ 73,018.83	\$ 79,346.00	\$ 6,327.17	92.03%
Vandalism/Theft	6750	\$ 219.83	\$ 265.91	\$ 332.16	\$ 500.00	\$ 167.84	66.43%
Memberships	6810	\$ 70.00	\$ 12,370.00	\$ 13,335.00	\$ 14,435.00	\$ 1,100.00	92.38%
Office Supplies	6910	\$ 1,754.04	\$ 4,037.59	\$ 13,525.06	\$ 12,709.00	\$ (816.06)	106.42%
Postage Expense	6920	\$ 231.93	\$ 1,037.65	\$ 12,743.91	\$ 12,700.00	\$ (43.91)	100.35%
Advertising Expense	6930	\$ 1,275.00	\$ 900.00	\$ 4,190.95	\$ 2,490.00	\$ (1,700.95)	168.31%
Printing Charges	6940	\$ 45.31	\$ 10,538.09	\$ 5,191.67	\$ 14,123.00	\$ 8,931.33	36.76%
Registration Fees	6950	\$ 6,133.16	\$ 20,251.06	\$ 67,525.39	\$ 47,732.00	\$ (19,793.39)	141.47%
Approp Redev/Collection Fees	6960	\$ -	\$ 509,538.40	\$ 541,882.42	\$ 545,454.00	\$ 3,571.58	99.35%
Minor Furn Fixture & Equip	6980	\$ 65.69	\$ 1,121.45	\$ 1,185.36	\$ 1,137.00	\$ (48.36)	104.25%
Fingerprint Fees (HR)	7010	\$ 261.47	\$ 47.00	\$ 681.47	\$ 2,640.00	\$ 1,958.53	25.81%
Fire & Safety Insp Fees	7020	\$ -	\$ 2,239.93	\$ 2,324.65	\$ 3,800.00	\$ 1,475.35	61.18%
Permit & Licensing Fees	7030	\$ 1,350.00	\$ 1,740.26	\$ 4,978.40	\$ 6,350.00	\$ 1,371.60	78.40%
State License Fee	7040	\$ -	\$ 657.50	\$ 48.75	\$ 1,000.00	\$ 951.25	4.88%
Professional Services	7100	\$ 29,500.00	\$ 7,000.00	\$ 68,708.00	\$ 81,550.00	\$ 12,842.00	84.25%
Legal Services	7110	\$ 3,319.30	\$ 39,488.06	\$ 40,106.96	\$ 90,000.00	\$ 49,893.04	44.56%
Typeset and Print Services	7115	\$ -	\$ -	\$ 23,820.15	\$ 29,300.00	\$ 5,479.85	81.30%
Instructor Services	7120	\$ 20,326.80	\$ 34,621.35	\$ 112,317.05	\$ 108,303.00	\$ (4,014.05)	103.71%
PERS Admin Fees	7125	\$ 87.83	\$ 1,130.80	\$ 1,179.19	\$ 2,128.00	\$ 948.81	55.41%
Audit Services	7130	\$ -	\$ 11,760.00	\$ 12,375.00	\$ 20,275.00	\$ 7,900.00	61.04%
Medical & Health Svcs (HR)	7140	\$ 671.00	\$ 500.00	\$ 2,076.00	\$ 6,420.00	\$ 4,344.00	32.34%
Security Services	7150	\$ 525.00	\$ 2,932.50	\$ 5,643.72	\$ 4,147.00	\$ (1,496.72)	136.09%
Entertainment Services	7160	\$ -	\$ -	\$ 159.89	\$ 2,400.00	\$ 2,240.11	6.66%
Business Services	7180	\$ 910.15	\$ 78,556.53	\$ 51,584.04	\$ 67,660.00	\$ 16,075.96	76.24%
Umpire/Referee Services	7190	\$ 370.00	\$ 323.75	\$ 1,555.00	\$ 1,500.00	\$ (55.00)	103.67%
Subscriptions	7210	\$ 9.99	\$ 1,423.98	\$ 135.90	\$ 3,723.00	\$ 3,587.10	3.65%
Rents & Leases - Equip	7310	\$ 643.84	\$ 2,570.04	\$ 6,766.94	\$ 24,000.00	\$ 17,233.06	28.20%
Bldg/Field Leases & Rental	7320	\$ -	\$ (60.00)	\$ (250.00)	\$ 60.00	\$ 310.00	-416.67%
Event Supplies	7410	\$ -	\$ 118.63	\$ 982.09	\$ 3,330.00	\$ 2,347.91	29.49%
Supplies	7420	\$ 2,617.56	\$ 1,484.00	\$ 12,559.64	\$ 14,435.00	\$ 1,875.36	87.01%
Bingo Supplies	7430	\$ -	\$ 526.49	\$ 3,145.12	\$ 3,600.00	\$ 454.88	87.36%
Sporting Goods	7440	\$ 1,180.00	\$ 1,687.75	\$ 6,334.90	\$ 6,000.00	\$ (334.90)	105.58%
Arts and Craft Supplies	7450	\$ -	\$ -	\$ -	\$ 3,375.00	\$ 3,375.00	0.00%
Training Supplies	7460	\$ 811.31	\$ 699.71	\$ 841.31	\$ 1,800.00	\$ 958.69	46.74%
Small Tools	7500	\$ 216.37	\$ 4,370.40	\$ 4,442.99	\$ 6,000.00	\$ 1,557.01	74.05%
Safety Supplies	7510	\$ 79.65	\$ 853.51	\$ 4,963.87	\$ 5,750.00	\$ 786.13	86.33%
Uniform Allowance	7610	\$ 186.35	\$ 4,178.59	\$ 8,481.12	\$ 11,220.00	\$ 2,738.88	75.59%
Safety Clothing	7620	\$ 721.25	\$ 1,610.23	\$ 1,969.99	\$ 4,764.00	\$ 2,794.01	41.35%
Transportation and Travel	7700	\$ -	\$ -	\$ -	\$ 1,500.00	\$ 1,500.00	0.00%
Conference&Seminar Staff	7710	\$ 62.00	\$ 5,233.33	\$ 3,913.21	\$ 23,196.00	\$ 19,282.79	16.87%
Conference&Seminar Board	7715	\$ -	\$ -	\$ 283.00	\$ 4,450.00	\$ 4,167.00	6.36%
Conference&Seminar Travel Exp	7720	\$ -	\$ -	\$ 1,949.86	\$ 13,718.00	\$ 11,768.14	14.21%
Out of Town Travel Board	7725	\$ -	\$ -	\$ 1,221.94	\$ 2,420.00	\$ 1,198.06	50.49%
Private Vehicle Mileage	7730	\$ -	\$ 123.00	\$ 32.48	\$ 3,892.00	\$ 3,859.52	0.83%
Buses/Excursions	7750	\$ -	\$ -	\$ -	\$ 17,400.00	\$ 17,400.00	0.00%
Utilities - Gas	7810	\$ 3,577.18	\$ 23,851.18	\$ 37,299.42	\$ 30,414.00	\$ (6,885.42)	122.64%
Utilities - Water	7820	\$ 47,484.35	\$ 795,854.50	\$ 590,630.88	\$ 899,999.00	\$ 309,368.12	65.63%
Utilities - Electric	7830	\$ 15,974.76	\$ 133,706.41	\$ 180,278.33	\$ 210,000.00	\$ 29,721.67	85.85%
Airport Assessment Exp	7840	\$ 1,517.00	\$ 842.00	\$ 1,517.00	\$ 14,000.00	\$ 12,483.00	10.84%
Awards and Certificates	7910	\$ 448.00	\$ 1,433.67	\$ 7,592.60	\$ 14,206.00	\$ 6,613.40	53.45%
Meals for Staff Training	7920	\$ 145.21	\$ 1,218.06	\$ 1,679.00	\$ 3,500.00	\$ 1,821.00	47.97%
Employee Morale	7930	\$ -	\$ 144.24	\$ 2,556.80	\$ 5,500.00	\$ 2,943.20	46.49%
COP Debt - PV Fields	7950	\$ -	\$ 229,759.38	\$ 223,759.02	\$ 223,760.00	\$ 0.98	100.00%
Reserve Computer Fleet	7971	\$ -	\$ 5,000.00	\$ -	\$ -	\$ -	0.00%
Reserve Dry Period	7973	\$ -	\$ -	\$ 36,645.00	\$ 36,645.00	\$ -	100.00%
Reserve Repair/Oper/Admin	7975	\$ -	\$ 150,000.00	\$ 100,000.00	\$ 100,000.00	\$ -	100.00%
Reserve - Compensated Absences	7976	\$ -	\$ -	\$ 75,000.00	\$ 75,000.00	\$ -	100.00%
Admin Fee/CC Refund 2020	8112	\$ -	\$ 11,738.34	\$ 275.00	\$ -	\$ (275.00)	0.00%
Services and Supplies		\$ 229,038.62	\$ 2,712,636.05	\$ 3,003,864.23	\$ 3,714,379.00	\$ 710,514.77	80.87%
YTD Comparison				\$ 291,228.18			
Capital							
Capital	8400	\$ (5,020.63)	\$ -	\$ -	\$ -	\$ -	0.00%
Equip/Facility Replacement	8420	\$ -	\$ 269.42	\$ 29,984.93	\$ 64,730.00	\$ 34,745.07	46.32%
Community Center Marquee	8468	\$ -	\$ 3,997.52	\$ -	\$ -	\$ -	0.00%
Switches and Servers	8474	\$ -	\$ 29,642.96	\$ -	\$ -	\$ -	0.00%
Turf Grinder	8475	\$ -	\$ 14,366.14	\$ -	\$ -	\$ -	0.00%
Pitts Ranch BB Crt Repaint	8476	\$ -	\$ 7,950.00	\$ -	\$ -	\$ -	0.00%
PV Fields Painting West End	8477	\$ -	\$ 8,830.00	\$ -	\$ -	\$ -	0.00%
Inflatable System	8479	\$ 5,020.63	\$ -	\$ 5,020.63	\$ 5,500.00	\$ 479.37	91.28%
HVAC Administration Bldg	8481	\$ -	\$ 13,200.00	\$ -	\$ -	\$ -	0.00%

General Ledger
Fund 10 General Fund
May 2022 91%

Description	Account	Period Amount	One Year Prior Actual	Year to Date	Budget	Budget Remaining	% of Budget Used
HVAC for Room #6	8482	\$ -	\$ 10,876.76	\$ -	\$ -	\$ -	0.00%
ECAA Loan-Lighting Project	8483	\$ -	\$ -	\$ 52.50	\$ 190,000.00	\$ 189,947.50	0.03%
HVAC Conference Room	8485	\$ -	\$ -	\$ 7,414.00	\$ 15,000.00	\$ 7,586.00	49.43%
Pool Vacuum	8486	\$ -	\$ -	\$ 5,203.25	\$ 6,000.00	\$ 796.75	86.72%
Springville Parking Lot	8487	\$ -	\$ -	\$ 23,600.22	\$ 80,000.00	\$ 56,399.78	29.50%
Mission Oaks Parking Lot	8488	\$ -	\$ -	\$ 61,654.20	\$ 100,000.00	\$ 38,345.80	61.65%
Tennis Court Lighting	8489	\$ -	\$ -	\$ 116,802.34	\$ 140,000.00	\$ 23,197.66	83.43%
Senior Center Carpeting	8491	\$ -	\$ -	\$ 14,993.55	\$ 15,000.00	\$ 6.45	99.96%
Sr Ctr Upgrade to Sound Board	8492	\$ -	\$ -	\$ 13.70	\$ 15,000.00	\$ 14,986.30	0.09%
Bingo Console	8494	\$ -	\$ -	\$ 5,007.00	\$ 15,000.00	\$ 9,993.00	33.38%
Turf Sweeper	8495	\$ -	\$ -	\$ 8,189.10	\$ 8,190.00	\$ 0.90	99.99%
Prop 68 Arneill Ranch Park	8496	\$ 273,038.81	\$ -	\$ 361,645.94	\$ 82,880.00	\$ (278,765.94)	436.35%
Capital		\$ 273,038.81	\$ 89,132.80	\$ 639,581.36	\$ 737,300.00	\$ 97,718.64	86.75%
YTD Comparison				\$ 550,448.56			
TOTAL EXPENSES		\$ 772,270.91	\$ 6,200,347.48	\$ 7,015,331.07	\$ 9,294,716.00	\$ 2,279,384.93	75.48%
TOTAL YTD COMPARISON				\$ 814,983.59			

General Ledger
Fund 20 Assessment District
May 2022 91%

Description	Account	Period Amount	One Year Prior Actual	Year to Date	Budget	Budget Remaining	% of Budget Used
Revenue							
Interest Earnings	5310	\$ -	\$ (257.74)	\$ (247.00)	\$ (238.00)	\$ 9.00	103.78%
Assessment Revenue	5500	\$ (413.00)	\$ (1,176,959.03)	\$ (1,205,531.39)	\$ (1,209,566.00)	\$ (4,034.61)	99.67%
Revenue		\$ 413.00	\$ 1,177,216.77	\$ 1,205,778.39	\$ 1,209,804.00	\$ 4,025.61	99.67%
YTD Comparison				\$ 28,561.62			
Personnel							
Full Time Salaries	6100	\$ 1,715.97	\$ 16,097.06	\$ 19,706.11	\$ 20,831.00	\$ 1,124.89	94.60%
Overtime Salaries	6101	\$ -	\$ -	\$ 66.98	\$ -	\$ (66.98)	0.00%
Cell Phone Allowance	6108	\$ 15.06	\$ 41.58	\$ 171.97	\$ 178.00	\$ 6.03	96.61%
Retirement	6120	\$ 255.56	\$ 2,786.55	\$ 3,110.95	\$ 3,568.00	\$ 457.05	87.19%
Employee Insurance	6130	\$ 234.95	\$ 4,343.24	\$ 2,799.92	\$ 3,749.00	\$ 949.08	74.68%
Workers Compensation	6140	\$ 165.64	\$ 1,659.46	\$ 2,022.72	\$ 2,483.00	\$ 460.28	81.46%
Personnel		\$ 2,387.18	\$ 24,927.89	\$ 27,878.65	\$ 30,809.00	\$ 2,930.35	90.49%
YTD Comparison				\$ 2,950.76			
Services and Supplies							
Incidental Costs - Assess	6709	\$ -	\$ 18,620.01	\$ 28,759.18	\$ 30,094.00	\$ 1,334.82	95.56%
Grounds Maintenance	6710	\$ -	\$ -	\$ 3,464.08	\$ 15,000.00	\$ 11,535.92	23.09%
Tree Care	6719	\$ 3,476.42	\$ 59,526.50	\$ 59,763.92	\$ 67,500.00	\$ 7,736.08	88.54%
Contracted LS Services	6720	\$ 42,348.40	\$ 450,637.87	\$ 393,416.10	\$ 465,913.00	\$ 72,496.90	84.44%
Park Amenities - Assess	6722	\$ 5,485.67	\$ 5,814.56	\$ 12,164.59	\$ 17,500.00	\$ 5,335.41	69.51%
Registration Fees	6950	\$ -	\$ -	\$ -	\$ 70.00	\$ 70.00	0.00%
Approp Redev/Collection Fees	6960	\$ -	\$ 2,891.08	\$ 2,969.14	\$ 3,500.00	\$ 530.86	84.83%
COP Debt - PV Fields	7950	\$ -	\$ 525,559.21	\$ 529,759.38	\$ 529,760.00	\$ 0.62	100.00%
Expense		\$ 53,697.67	\$ 1,087,977.12	\$ 1,058,175.04	\$ 1,160,146.00	\$ 101,970.96	91.21%
YTD Comparison				\$ (29,802.08)			
TOTAL EXPENSES		\$ 56,084.85	\$ 1,112,905.01	\$ 1,086,053.69	\$ 1,190,955.00	\$ 104,901.31	91.19%
TOTAL YTD COMPARISON				\$ (26,851.32)			

General Ledger
Fund 30 Quimby Fee Fund
May 2022 91%

Description	Account	Period Amount	One Year Prior Actual	Year to Date	Budget	Budget Remaining	% of Budget Used
Revenue							
Interest Earnings	5310	\$ -	\$ (29,401.27)	\$ (5,618.05)	\$ (10,013.00)	\$ (4,394.95)	56.11%
MBS Interest Earnings	5320	\$ -	\$ (7,320.00)	\$ -	\$ -	\$ -	0.00%
Revenue		\$ -	\$ (36,721.27)	\$ (5,618.05)	\$ (10,013.00)	\$ (4,394.95)	56.11%
YTD Comparison				\$ 31,103.22			
Expense							
Registration Fees	6950	\$ -	\$ 12.00	\$ 36.00	\$ -	\$ (36.00)	0.00%
Expense		\$ -	\$ 12.00	\$ 36.00	\$ -	\$ (36.00)	0.00%
Capital							
Arneill Ranch Park Renovation	8464	\$ (15,789.00)	\$ 93,037.90	\$ 1,312,084.85	\$ 1,477,651.00	\$ 165,566.15	88.80%
PVAC Restroom & Shower	8469	\$ -	\$ 35,249.13	\$ -	\$ -	\$ -	0.00%
Fertilizer Injector System	8478	\$ -	\$ 50,788.90	\$ -	\$ -	\$ -	0.00%
Community Center Kitchen	8480	\$ 4,577.97	\$ 19,907.84	\$ 259,996.36	\$ 273,262.00	\$ 13,265.64	95.15%
Pickleball Sports Complex	8493	\$ 4,863.40	\$ -	\$ 6,188.40	\$ 1,400,000.00	\$ 1,393,811.60	0.44%
Capital		\$ (6,347.63)	\$ 198,995.77	\$ 1,578,305.61	\$ 3,150,913.00	\$ 1,572,607.39	50.09%

Date Received	Amount	Amount Earmarked	Developer	Development Case #	Amount Expended	Balance	Allocation Date
7/31/14	\$ 615,709.00	\$ 720,600.00	AMLI Residential	Springville (RPD-173)	\$ 615,709.00	\$ -	7/31/2019
1/31/15	\$ 2,250,489.70	\$ 2,250,489.70	Fairfield LLC		\$ 1,894,048.35	\$ 356,441.35	1/31/2020
8/8/16	\$ 2,649,209.00	\$ 3,200,000.00	Comstock/Elacora Mission Oaks		\$ 1,600,369.06	\$ 1,048,839.94	8/8/2021
8/10/16	\$ 474,353.00	\$ 629,500.00	KB Homes		\$ 230,159.82	\$ 244,193.18	8/10/2021
6/7/18	\$ 21,612.25	\$ -	Crestview		\$ -	\$ 21,612.25	6/7/2023
6/27/18	\$ -	\$ -	Aldersgate Construction		\$ 146,682.55	\$ -	REFUNDED
3/6/19	\$ 35,242.00	\$ -	Habitat for Humanity		\$ -	\$ 35,242.00	3/6/2024
9/12/19	\$ -	\$ -	Aldersgate Construction		\$ 92,200.46	\$ -	REFUNDED
11/21/19	\$ 1,264,500.00	\$ -	Shea Homes		\$ -	\$ 1,264,500.00	11/21/2024
Total	\$ 7,311,114.95	\$ 6,800,589.70			\$ 4,579,169.24	\$ 2,970,828.72	

General Ledger
Fund 40 Park Impact Fee Fund
May 2022 91%

Description	Account	Period	Amount	One Year Prior	Actual	Year to Date	Budget	Budget Remaining	% of Budget Used
Revenue									
Interest Earnings	5310	\$	-	\$	-	\$ (3.26)	\$ -	\$ 3.26	0.00%
Park Impact Fees	5450	\$	-	\$	-	\$ (172,347.20)	\$ -	\$ 172,347.20	0.00%
Revenue		\$	-	\$	-	\$ (172,350.46)	\$ -	\$ (172,350.46)	0.00%

General Ledger
Fund 50 CDBG - Food Share
May 2022 91%

Description	Account	Period Amount	One Year Prior Actual	Year to Date	Budget	Budget Remaining	% of Budget Used
Revenue							
CDBG - Food Share	5577	\$ -	\$ -	\$ -	\$ (42,428.33)	\$ (42,428.33)	0.00%
Revenue		\$ -	\$ -	\$ -	\$ 42,428.33	\$ 42,428.33	0.00%
Personnel							
Full Time Salaries	6100	\$ 434.91	\$ -	\$ 14,277.50	\$ 37,587.00	\$ 23,309.50	37.99%
Part-Time Salaries	6110	\$ 2,834.80	\$ -	\$ 5,654.50	\$ 5,000.00	\$ (654.50)	113.09%
Retirement	6120	\$ 449.77	\$ -	\$ 1,143.90	\$ 2,853.00	\$ 1,709.10	40.09%
Employee Insurance	6130	\$ 4.54	\$ -	\$ 38.61	\$ 3,591.00	\$ 3,552.39	1.08%
Workers Compensation	6140	\$ 75.52	\$ -	\$ 191.72	\$ 1,082.00	\$ 890.28	17.72%
Personnel		\$ 3,799.54	\$ -	\$ 21,306.23	\$ 50,113.00	\$ 28,806.77	42.52%
Services and Supplies							
Office Supplies	6910	\$ 213.63	\$ -	\$ 847.33	\$ -	\$ (847.33)	0.00%
Event Supplies	7410	\$ -	\$ -	\$ -	\$ 1,500.00	\$ 1,500.00	0.00%
Uniform Allowance	7610	\$ -	\$ -	\$ -	\$ 150.00	\$ 150.00	0.00%
Private Vehicle Mileage	7730	\$ -	\$ -	\$ -	\$ 1,500.00	\$ 1,500.00	0.00%
Services and Supplies		\$ 213.63	\$ -	\$ 847.33	\$ 3,150.00	\$ 2,302.67	26.90%

Revenue Budget	\$ 42,428.33
Expense Total	\$ 22,153.56
Percent of Revenue	52.2%

**PLEASANT VALLEY RECREATION AND PARK DISTRICT
STAFF REPORT / AGENDA REPORT**

TO: BOARD OF DIRECTORS

FROM: MARY OTTEN, GENERAL MANAGER
By: Dylan Gunning, Administrative Analyst

DATE: July 6, 2022

**SUBJECT: REVIEW AND APPROVAL OF SURPLUS SUPPLIES
AND EQUIPMENT LIST**

BACKGROUND

On April 4, 2018, Pleasant Valley Recreation and Park District adopted a surplus property disposal policy which outlines how the District disposes of surplus equipment and office supplies. This policy was updated on June 2, 2021.

ANALYSIS

Special districts such as PVRPD are not required to maintain a surplus property disposal policy. However, due to events within the District such as the office redesign, upgraded IT infrastructure, and other capital projects, it has been determined that there is a need to uniformly dispose of surplus personal property owned by the District. In accordance with the Surplus District Property Disposal Policy approved on June 2, 2021, staff has compiled the attached list for board review.

FISCAL IMPACT

This action will have no fiscal impact on the FY2021-2022 or FY2022-2023 budgets.

RECOMMENDATION

It is recommended that the Board review and approve the items on the Surplus Supplies and Equipment List for disposal.

ATTACHMENTS

- 1) Surplus Supplies and Equipment List (1 page)

**PLEASANT VALLEY RECREATION AND PARK DISTRICT
STAFF REPORT / AGENDA REPORT**

TO: BOARD OF DIRECTORS

FROM: MARY OTTEN, GENERAL MANAGER
By: Leonore Young, Administrative Services Manager

DATE: July 6, 2022

**SUBJECT: CONSIDERATION AND ADOPTION OF RESOLUTION
NO. 714 FOR APPROPRIATION AMOUNT SUBJECT TO
GANN LIMITATION, FY 2022-2023**

BACKGROUND

Every fiscal year staff brings a resolution requesting that the Board adopt a resolution setting the Gann Limit for the upcoming fiscal year 2022-2023.

Article XIII B of the California Constitution specifies that appropriations made by governmental entities may increase annually by the change in population and the change in the California per capita personal income.

While the percent change in California per capita personal income used in setting the fiscal year 2022-2023 appropriations limit is a statewide figure, the District population decrease is the percent change in population for the City of Camarillo. The City population and California per capita personal income changes are provided by the State Department of Finance.

In calculating the appropriation amount subject to limitation, fiscal year 1978-1979 was designated as the base year in the amount of \$1,769,843 with adjustments to be made in subsequent years according to the criteria as referenced above. Staff has computed the limitation amount of \$13,793,801 for fiscal year 2022-2023 as indicated in Attachment 2. Attachment 1 is a proposed resolution setting the amount.

ANALYSIS

Every May the State Department of Finance generates the estimate of the percentage change in population to local governments. Each local jurisdiction must use the percentage change in population in conjunction with the change in the cost of living or price factor to calculate the appropriations limit for the upcoming fiscal year. The new appropriations limit is calculated by staff and presented to the Board via consent item. Special districts are required by law to calculate their appropriations limit and present the calculation with their annual audit.

FISCAL IMPACT

There is no fiscal impact.

RECOMMENDATION

It is recommended that the Board adopt Resolution No. 714 setting the fiscal year 2022-2023 appropriations amount subject to the Gann Limits.

ATTACHMENT

- 1) Resolution No. 714 (1 page)
- 2) FY 2022-2023 Appropriations Limit (1 page)

RESOLUTION NO. 714

A RESOLUTION OF THE BOARD OF DIRECTORS OF THE PLEASANT VALLEY RECREATION AND PARK DISTRICT ESTABLISHING THE ANNUAL APPROPRIATIONS SUBJECT TO THE LIMITATION SET FORTH IN ARTICLE XIII B OF THE CONSTITUTION OF THE STATE OF CALIFORNIA

WHEREAS, Article XIII B of the California Constitution established the total annual appropriations subject to limitations for the State and for local government; and

WHEREAS, said limitation is defined as the appropriations limit of such entities for the prior year adjusted for changes in per capita personal income and population of said entities; and

WHEREAS, the Board of Directors of the Pleasant Valley Recreation and Park District wishes to establish the appropriations subject to limitation for the fiscal year 2022-2023,

NOW, THEREFORE, the Board of Directors of the Pleasant Valley Recreation and Park District does hereby resolve as follows:

1. The appropriations subject to limitation for the Pleasant Valley Recreation and Park District for the fiscal year 1978 -1979 was \$1,769,843.

2. The appropriations subject to limitation pursuant to Article XIII B of the California Constitution for the Pleasant Valley Recreation and Park District for the fiscal year 2022-2023 is \$13,793,801.

3. Said appropriations subject to limitation include adjustments pursuant to Section 3 of Article XIII B of the California Constitution as of the date of this resolution.

PASSED AND ADOPTED this 6th day of July 2022, by the following vote:

AYES:

NOES:

ABSENT:

ABSTAIN:

ROBERT KELLEY, CHAIR
PLEASANT VALLEY RECREATION AND PARK DISTRICT

ATTESTED:

BEV DRANSFELDT, SECRETARY
PLEASANT VALLEY RECREATION AND PARK DISTRICT

**PLEASANT VALLEY RECREATION AND PARK DISTRICT
2022-2023 APPROPRIATION LIMIT**

California Per Capita Personal Income percentage change:	7.55%		
Converted to a ratio:	$\frac{7.55 + 100}{100}$	=	1.0755
PVRPD Estimated change in population:	-0.80%		
Converted to a ratio:	$\frac{99.2}{100}$	=	0.9920
Calculation: 2021-2022 ratio of change	$1.0755 \times .9920$	=	1.0669
1978-1979 Appropriation Limitation			1,769,843
2021-2022 Appropriation Limitation			12,928,860
2022-2023= Appropriation Limit \$12,928,860 (2021-2022 limitation) X 1.0669 (2021-2022 ratio of change)		=	<u><u>13,793,801</u></u>

**PLEASANT VALLEY RECREATION AND PARK DISTRICT
STAFF REPORT / AGENDA REPORT**

TO: BOARD OF DIRECTORS

**FROM: MARY OTTEN, GENERAL MANAGER
By: Lanny Binney, Recreation Supervisor**

DATE: July 6, 2022

SUBJECT: CONSIDERATION AND APPROVAL OF THREE-YEAR AGREEMENT BETWEEN THE PLEASANT VALLEY RECREATION AND PARK DISTRICT AND FREEDOM PARK BMX RACEWAY, INC. FOR THE OPERATION OF THE BMX TRACK

SUMMARY

The Pleasant Valley Recreation and Park District (“District”) owns and operates a bicycle motocross (“BMX”) track at Freedom Park. Since 2005, the District has had an Agreement with Richard and Andrea Huvad (“Freedom Park BMX Raceway, Inc”) to act as Contract Operator (“Operator”) to manage and operate the track. The Agreement expires in September 2022 with both parties seeking an extension.

BACKGROUND

Beginning in 2005, the District, as the facility owner, entered an Agreement with a Contract Operator to operate the BMX Track for five years. The Agreement was shortened to three years and additional discussions took place regarding physical improvements to the facility by the operator and additional programs in 2010. The District and Operator have since renewed the Agreement three (3) additional times in 2013, 2016 and 2019. During the spring of 2022, the District and Operator met to discuss operations, finances, and terms and conditions of the proposed extension to the Agreement.

ANALYSIS

The proposed length of the Agreement is three (3) years beginning September 2022 and expiring August 2025. The District and Operator shall meet to discuss additional agreements prior to the expiration of this proposed Agreement.

A summary of updated Agreement items includes:

Fees to be Charged

The Operator has paid rent on a monthly basis with a \$25 escalator added each year since 2019. This does not include during the pandemic when the District waived all rental fees from April 2020 to March 2021. The proposed 2022-2025 Agreement includes monthly rent starting at \$400 with a \$25 per month annual escalator through the agreement.

September 1, 2022, to August 31, 2023 - \$400 per month
September 1, 2023, to August 31, 2024 - \$425 per month
September 1, 2024, to August 31, 2025 - \$450 per month

Utility Payments by Operator

The 2013-2016 Agreement included a \$35 per month utility (water) fee. Upon extension of that Agreement (2016-2019), utility fees were increased to \$50 per month. The track surface has changed from dirt to a slurry surface and the track needs less water, but the use of water is still necessary to operate. The proposed 2022-2025 Agreement includes the water rate to remain at the \$50 per month.

September 1, 2022, to August 31, 2023 - \$50 per month
September 1, 2023, to August 31, 2024 - \$50 per month
September 1, 2024, to August 31, 2025 - \$50 per month

Electric bills are sent and paid directly by the Operator.

Portable Toilet & Wash Station Payments by Operator

Since January 2022, the BMX participants have been using the porta potty and wash station located at the hockey rink. The current cost of this portable toilet and wash station with additional service is \$174 per month. The costs are split between the BMX Operator, the renters of the hockey rink and the District. The current fee due is \$58 per month as a standalone cost and is not included with rent and water contribution. If the fees increase on the portable toilet and wash station, the monthly fee will increase to the Contract Operator.

Background Check Requirements

In accordance with Public Resources Code Section 5164 and Penal Code Section 1110533, the District is requiring the Contract Operator to fingerprint and/or perform adequate background screening (*LiveScan*, for example) for all staff/coaches/volunteers associated with the operation as required by all applicable laws, at Contract Operator sole expense. Operator is providing the District with a signed letter or documentation on an annual basis stating they have complied with performing the screening process (Attachment 3).

AB2007 – Concussions or Other Head Injuries

This legislation requires that athletes participating in youth sports organizations, as defined to include organizations, businesses, nonprofit entities, or local governmental agencies that sponsor or conduct amateur sports competitions, training, camps, or clubs in which persons 17 years of age or younger participate in any of 27 designated sports (in this case, BMX specifically) be immediately removed from an athletic activity for the remainder of the day if the athlete is suspected of sustaining a concussion or head injury, and prohibits the athlete from returning to the athletic activity until the athlete is evaluated by a licensed health care provider, trained in the management of concussions, and acting within the scope of his or her practice, and the athlete receives written clearance from the licensed health care provider to return to the athletic activity.

This Operator shall be responsible for enforcing AB2007 and must submit a letter each year (Attachment 4) to the District that the Operator has complied with these regulations.

BMX Track Safety

The Operator shall develop a Facility Safety Checklist (“Checklist”) to be completed each day prior to operation. Checklists shall be available for inspection with any safety violations or

accidents submitted within 24 hours to the District. A District Accident Report/Incident Report is included (Attachment 5) for use by Operator.

FISCAL IMPACT

The District will generate an additional \$2,340 in revenue throughout this 2022-2025 Agreement.

Agreement	2016-2019	2019-2022	2022-2025
Facility Rental	\$10,800	\$12,600	\$15,300
Utility Fees	\$ 1,260	\$ 1,800	\$ 1,800
Portable Toilet	\$ 0	\$ 696	\$ 2,088
TOTAL	\$12,060	\$15,096	\$19,188

RECOMMENDATION

It is recommended the Board review and approve a three-year Agreement with Freedom Park BMX Raceway, Inc. for the operation of the Freedom Park BMX Track.

ATTACHMENTS

- 1) Property Map (1 page)
- 2) Insurance Requirements (4 pages)
- 3) Background Check from USA BMX (3 pages)
- 4) Certificate of Completion for AB 2007 (1 page)
- 5) Accident/Incident Report (2 pages)
- 6) Contract Operator Agreement - Freedom Park BMX Raceway, Inc. (11 pages)





PLEASANT VALLEY RECREATION & PARK DISTRICT

INSURANCE CERTIFICATE AND ENDORSEMENT REQUIREMENTS

Pleasant Valley Recreation & Park District (PVRPD) requires a **Certificate of Insurance (COI)** for your event naming PVRPD as additionally insured. The COI must be received by the District no later than 30 days prior to your event.

Along with the insurance certificate, a separate Endorsement Page must be provided naming PVRPD as **additionally insured**. The Cancellation Clause should read as follows: "Should any of the above described policies be cancelled before the expiration date thereof, the issuing company will mail 30 days written notice to the certificate holder named."

Minimum liability limits are \$1,000,000 per occurrence

THE INSURANCE CERTIFICATE SHOULD NOTE THE FOLLOWING INFORMATION:

- Date of event (if no specific date, then insurance can be kept on file and be good for the life of the policy)
- Location of event
- Name of your organization/business/group

The following information should be typed in the "Certificate Holder" section:

**Additionally Insured:
Pleasant Valley Recreation and Park District
1605 E. Burnley Street
Camarillo, CA 93010**

Please mail/deliver or FAX to:

PVRPD
1605 E. Burnley Street
Camarillo, CA 93010
Attn.: Reservations
FAX: (805) 482-3468



Additional Insured Endorsement

Certificates of Insurance without endorsements do not protect the additionally insured (in this case, PVRPD). An endorsement is required because, as noted on an insurance certificate: "This certificate is issued as a matter of information only and confers no rights upon the certificate holder. This certificate does not amend, extend or alter the coverage afforded by the policy."

This separate Endorsement Page will need to list:

- Policy number
- Wording that states "This endorsement changes the policy"
- Wording that states "This endorsement modifies insurance provided under the following: Commercial General Liability Coverage Part: SCHEDULE
- Name of Person or Organization that is being Additionally Insured:

Pleasant Valley Recreation and Park District
1605 E. Burnley St
Camarillo, CA 93010

Additional Info to Note: The RENTER will need to agree to abide by the following:

- A. General liability insurance: the RENTER shall procure and maintain, for the duration of the use period contemplated herein, commercial general liability insurance with coverage at least as broad as Insurance Services Office Form CG 00 01, in an amount not less than \$1,000,000 per occurrence, \$2,000,000 general aggregate, for bodily injury, personal injury, and property damage. The policy must include contractual liability that has not been amended. Any endorsement restricting standard ISO "insured contract" language will not be accepted. If alcohol is sold during the permitted activity, coverage must include full liquor liability
- B. Such insurance shall name PLEASANT VALLEY RECREATION AND PARK DISTRICT, its officers, employees, agents, and volunteers as additional insureds prior to the use of the facility. The RENTER shall file certificates of such insurance with the DISTRICT, which shall be endorsed to provide thirty (30) days' notice to the DISTRICT of cancellation or any change of coverage or limits. If a copy of the insurance certificate is not on file prior to the event, the DISTRICT may deny access to the facility.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	CONTACT NAME:	
	PHONE (A/C, No, Ext):	FAX (A/C, No):
INSURED	E-MAIL ADDRESS:	
	INSURER(S) AFFORDING COVERAGE	
	NAIC #	
	INSURER A :	
	INSURER B :	
	INSURER C :	
INSURER D :		
INSURER E :		
INSURER F :		

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	GENERAL LIABILITY <input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMPI/OP AGG \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICE/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						WC STATU-TORY LIMITS <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

CERTIFICATE HOLDER**CANCELLATION**

Pleasant Valley Recreation & Park District
 1605 E. Burnley Street
 Camarillo, CA 93010
 (805) 482-1996
 Attn: (PVRPD Contact)

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

DESCRIPTIONS (Continued from Page 1)

Re: Freedom Park BMX. The General Liability policy includes an endorsement providing that 30 days notice of cancellation will be given to the Certificate Holder by the Insurance Carrier.

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY

Additional Insured/Waiver of Subrogation/Primary & Non-Contributory

ADDITIONAL INSURED: OWNERS AND / OR LESSORS OF PREMISES, LESSORS OF LEASED EQUIPMENT, SPONSORS OR CO-PROMOTERS

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART

This policy is amended to include as an additional Insured any person or organization of the types designated below, but only with respect to liability arising out of your operations:

1. Owners and / or lessors of the premises leased, rented, or loaned to you, subject to the following additional exclusions:
 - a. This insurance applies only to an "occurrence" which takes place while you are a tenant in the premises;
 - b. This insurance does not apply to "bodily injury" or "property damage" resulting from structural alterations, new construction or demolition operations performed by or on behalf of the owner and / or lessor of the premises;
 - c. This insurance does not apply to liability of the owners and / or lessors for "bodily injury" or "property damage" arising out of any design defect or structural maintenance of the premises or loss caused by a premises defect.

With respect to any additional insured included under this policy, this insurance does not apply to the sole negligence of such additional insured.

2. Lessor of Leased Equipment, but only with respect to liability for "bodily injury", "property damage" or "personal and advertising injury" caused, in whole or in part, by your maintenance, operation or use of equipment leased to you by such person(s) or organization(s) subject to the following additional exclusions:
 - a. This insurance does not apply to any "occurrence" which takes place after the equipment lease expires.

3. Sponsors

All other terms and conditions of this Policy remain unchanged.

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY

4. Co-Promoters

THIS INSURANCE IS PRIMARY, WITH ANY INSURANCE OR SELF-INSURANCE PROGRAM MAINTAINED BY THE NAME OF PERSON OR ORGANIZATION LISTED ABOVE BEING NON-CONTRIBUTING EXCEPTING LOSS RESULTING FROM THE SOLE NEGLIGENCE OF THE NAME OF PERSON OR ORGANIZATION LISTED ABOVE.

BLANKET WAIVER OF SUBROGATION

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART

It is agreed that, notwithstanding anything to the contrary in paragraph 8. Transfer of Rights of Recovery Against Others To Us of SECTION IV - COMMERCIAL GENERAL LIABILITY CONDITIONS, in the event of any payment under this policy, we waive our right of recovery against any person or organization with respect to which the insured has waived its right of recovery.

It is further agreed that work commenced under letter of intent or work order, subject to subsequent reduction to writing, with customers whose customary contracts would require a waiver of recovery rights against them also falls within this blanket waiver of subrogation.

All other terms and conditions of this Policy remain unchanged.



BACKGROUND SCREENING SOLUTIONS

Background Screening Report

National Center for Safety Initiatives, LLC (NCSI)
 P.O. Box 39008
 Cleveland, OH 44139
 Phone: 866-996-7412

FILE NUMBER	7106793	REPORT DATE	06-16-2022
REPORT TO	USA BMX - Track Operators (194628) 1645 W Sunrise Blvd Chandler, AZ 85233 Phone: (480) 961-1903 Fax: -	ORDER DATE	06-15-2022
		REFERENCE	FREEDOM PARK BMX
		TYPE	Background Screening by NCSI

California Disclaimer

The following statement is in 12 point bold font.

Pursuant to California Civil Code 1786.29 the following disclaimer is made. The accuracy or truthfulness of this report cannot be guaranteed as to the subject of the investigation, only that it was accurately copied from public records. Information generated as a result of identity theft, including evidence of criminal activity, may be inaccurately associated with the subject of this report. The Subject of this report may review all files in relation to this report, maintained by National Center for Safety Initiatives, LLC (NCSI) with a proper request and identification. National Center for Safety Initiatives, LLC (NCSI) may charge a fee of no more than \$8 for making such disclosures, except that National Center for Safety Initiatives, LLC (NCSI) will not charge a fee if you (1) certify that you are unemployed and state your intention to apply for a job within 60 days of the certification, (2) are a recipient of public welfare assistance, or (3) have reason to believe that the file of National Center for Safety Initiatives, LLC (NCSI) on you contains inaccurate information due to fraud.

De acuerdo al Código Civil 1786.29, la siguiente renuncia a responsabilidades es hecha. La exactitud o apego a la verdad de este informe, no puede ser garantizado como el sujeto de la investigación, solo que éste fue copiado con exactitud de los archivos públicos. La información generada como resultados de robo de identidad, incluyendo evidencia de actividad criminal, puede ser asociada de manera inexacta con el sujeto de este informe. El sujeto de este informe, puede revisar todos los archivos relacionados con este informe, custodiados por National Center for Safety Initiatives, LLC (NCSI) con una requisición adecuada e identificación. National Center for Safety Initiatives, LLC (NCSI) puede hacer el cargo por no más de \$8 dólares Americanos por mostrar dichos archivos, excepto que National Center for Safety Initiatives, LLC (NCSI) no cobrará una cuota si tu (1) certificas que eres desempleado y demuestras tus intenciones de solicitar trabajo dentro de 60 días de la certificación, (2) eres acreedor a ayuda pública "welfare", o (3) tienes razón para creer que National Center for Safety Initiatives, LLC (NCSI) el informe sobre ti contiene información inexacta como resultado de fraude.

Application Information

APPLICANT	HUVARD, ANDREA LAHAYE	SSN	XXX-XX-8295	DOB	10-31-XXXX
DRIVERS LICENSE	-	PHONE NUMBER	8053126130		
E-MAIL	HUVARD@CALLUTHERAN.EDU				
ADDRESS(ES)	135 LA CRESCENTA DR.	CITY / STATE / ZIP	CAMARILLO, CA 93010		

Investigative

Database + Trace + SOR

RESULTS No Reportable Records Found

NAME SEARCHED HUVARD, ANDREA LAHAYE SEARCH DATE 06-16-2022 8:57 AM MDT
 DOB SEARCHED 10-31-XXXX
 JURISDICTION NATIONWIDE
 JURISDICTION(S) SEARCHED

The search you have selected is a search of our criminal database(s) and may not represent 100% coverage of all criminal records in all jurisdictions and/or sources. Coverage details available upon request.

SSN VALIDATION INFORMATION

Deceased: No
 Message: Record
 Issued Location: California
 Issued Date Range: 1970

ADDRESS/IDENTITY HISTORY INFORMATION

CAUTION: Based on the information provided National Center for Safety Initiatives, LLC (NCSI) searched for public records in the sources referenced herein for criminal history information as permitted by federal and state law. 'No Reportable Records Found' means that our researchers could not locate a record that matched the SSN and at least one personal identifier (i.e., Name or Date of Birth) for the subject in that jurisdiction. Further investigation into additional jurisdictions, or utilization of additional identifying information, may be warranted. Please call for assistance.

Check It Twice**RESULTS No Reportable Records Found**

NAME SEARCHED HUVARD, ANDREA LAHAYE SEARCH DATE 06-16-2022 8:57 AM MDT
 DOB SEARCHED 10-31-XXXX SEARCH SCOPE
 JURISDICTION NATIONWIDE
 JURISDICTION(S) SEARCHED

The search you have selected is a search of our criminal database(s) and may not represent 100% coverage of all criminal records in all jurisdictions and/or sources. Coverage details available upon request.

CAUTION: Based on the information provided National Center for Safety Initiatives, LLC (NCSI) searched for public records in the sources referenced herein for criminal history information as permitted by federal and state law. 'No Reportable Records Found' means that our researchers could not locate a record that matched at least two personal identifiers (i.e., Name, SSN, Date of Birth, Address) for the subject in that jurisdiction. Further investigation into additional jurisdictions, or utilization of additional identifying information, may be warranted. Please call for assistance.

County Criminal Records Search**RESULTS No Reportable Records Found**

NAME SEARCHED HUVARD, ANDREA LAHAYE SEARCH DATE 06-16-2022 8:57 AM MDT
 DOB SEARCHED 10-31-XXXX SEARCH SCOPE
 JURISDICTION CA-VENTURA

CAUTION: Based on the information provided National Center for Safety Initiatives, LLC (NCSI) searched for public records in the sources referenced herein for criminal history information as permitted by federal and state law. 'No Reportable Records Found' means that our researchers could not locate a record that matched at least two personal identifiers (i.e., Name, SSN, Date of Birth, Address) for the subject in that jurisdiction. Further investigation into additional jurisdictions, or utilization of additional identifying information, may be warranted. Please call for assistance.

Disclaimer

This report is furnished to you pursuant to the Agreement for Service between the parties and in compliance with the Fair Credit Reporting Act. This report is furnished based upon your certification that you have a permissible purpose to obtain the

report. The information contained herein was obtained in good faith from sources deemed reliable, but the completeness or accuracy is not guaranteed.

*** End Of Report ***

Certificate of Completion



CDC HEADS UP

SAFE BRAIN. STRONGER FUTURE.

Awarded 06/20/2022 **to**

Date

Andrea Huvard

Name

**In recognition of completing the HEADS UP Concussion
Training for Youth Sports Coaches**



ACCIDENT REPORT

Date of Report: _____

Person's Name: _____ Age: _____ Sex: _____

Address: _____ City: _____ State: _____ Zip: _____

Home Phone: (_____) _____ Work Phone: (_____) _____

Date of Accident: _____ Time: _____ Facility: _____

Program: _____ Employee in Charge of Facility/Program: _____

Disposition: Home: _____ Hospital (Name): _____

Doctor: _____ Other: _____ Taken By: _____

Ambulance Service (Name): _____

Description of Injury: _____

Part(s) of Body Injured: _____

Description of Accident: _____

Describe First-Aid Administered: _____

Witnesses

Name: _____ Phone: (_____) _____

Address: _____ City: _____ State: _____ Zip: _____

Name: _____ Phone: (_____) _____

Address: _____ City: _____ State: _____ Zip: _____

Name: _____ Phone: (_____) _____

Address: _____ City: _____ State: _____ Zip: _____

ACCIDENTS: All accidents must be reported to the District Office (482-1996) immediately.

Report completed by: _____ Title: _____ Date: _____

Supervisor Signature: _____ Date: _____

General Manager Signature: _____ Date: _____

Risk Manager Signature: _____ Date: _____

Pleasant Valley Recreation and Park District

INCIDENT REPORT

(All reports due in office within 24 hours)

Location Name: _____ Date: _____

Time incident occurred (or possible time span): _____

Name of individual (if known): _____ Age: _____

Address: _____ Phone: _____

Nature of incident (give detailed description): _____

What damage resulted? Describe: _____

Did you witness the incident? _____ Any other witnesses? Name(s): _____

Describe action taken: _____

Recommendations: _____

Costs: Labor \$: _____ Material \$: _____

Person reporting: _____ Date: _____

Office follow-up: _____

**AGREEMENT FOR OPERATION OF
BMX TRACK FACILITY AT FREEDOM PARK**

This Agreement is by and between the Property Owner, Pleasant Valley Recreation and Park District (“District”), and the Contract Operator, Freedom Park BMX Raceway, Inc. (“Operator”).

RECITALS

A. District owns that certain parcel of real property (the “Property”) located in the City of Camarillo, County of Ventura, State of California, APN No. 230-0-030-145, comprising a portion of District’s Freedom Park. The Property is depicted on the map attached as Attachment 1 incorporated by reference herein.

B. In accordance with its authority contained in Public Resources Code sections 5786 and 5786.1, District desires to utilize a portion of the Property for BMX Bicycle Track Racing. The portion of the Property and the existing and any future BMX Bicycle Track improvements thereon shall hereafter be referred to as the “Facility.”

C. Operator proposes to operate and maintain the Facility for public use as described in this Agreement.

D. This Agreement sets forth the Parties mutual understanding and agreement as to the terms and conditions of the operation and maintenance of the Facility by Operator.

NOW, THEREFORE, based on the mutual covenants and conditions as set forth herein, the parties agree as follows:

1. Grant of Operator Rights; Condition of Facility. District hereby grants Operator the license and right to use and operate the Facility, in strict accordance with the terms and conditions set forth herein, for the purposes set forth in Section 2.

Operator acknowledges that (i) the Facility is in good and tenable condition; (ii) Operator has determined that the Facility is acceptable for Operator’s use; (iii) neither District nor any of its directors, officers, employees, volunteers, or agents (“District Parties”) has made any representations or warranties in connection with the physical condition of the Facility or its fitness for Operator’s use upon which Operator has relied directly or indirectly for any purpose; and (iv) Operator accepts the Facility in “AS-IS” condition and agrees that District shall not be obligated to make any alterations, additions or improvements thereto.

2. Use of Facility. Operator shall make the Facility available and shall operate the Facility for public recreational use consistent with the public purposes for which it was originally conveyed to the District by the County of Ventura, and in strict compliance with all applicable federal, state and local laws, statutes, ordinances, rules and regulations. The general public shall be allowed use of the Facility, and ingress and egress to the Facility, subject to reasonable restrictions and conditions established by Operator. All restrictions and conditions imposed by Operator are subject to review, approval and modification by District, in District’s sole and complete discretion which may be exercised for any reason and without penalty to District (hereafter “sole discretion”).

Specifically, Operator at its sole expense shall operate the Facility for BMX Bicycle Track racing. The Facility shall not be utilized for any other purpose, unless specifically authorized in advance in writing by the District in its sole discretion.

The Facility has no private or designated parking lot. Users can park in available adjacent parking lots. Parking may not be reserved for Facility events or operation without authorization by the District.

The Facility shall be operated by the Operator only during the times Freedom Park is open to the public as a public recreational facility. If Operator determines that it would be advantageous to operate the Facility at times when Freedom Park is not open to the public, Operator may request authorization to keep the Facility open during such times. Authorization to open the Facility when Freedom Park is closed must be given in writing by the District's Recreation Supervisor. If such authorization is given, the Operator is solely responsible for providing adequate security to the Facility and its patrons during said extended hours.

District and District Parties shall have no responsibility to safeguard the Facility or any of the equipment and property of Operator or its employees, customers, invitees, agents or contractors ("Operator Parties"). District and District Parties shall have no responsibility to safeguard or protect Operator or Operator Parties from bodily injury (including death) or personal injury.

Hours of operation must be visibly posted by Operator at the Facility and communicated effectively to the public.

3. Title to Facility. This Agreement shall not constitute a grant to Operator of any real property or estate interest in the Facility, whether fee, easement, license, or otherwise. District retains all ownership right to the Facility; and all improvements constructed thereon; and the right to possession of the Facility, except as granted to Operator herein. Operator's rights shall be strictly limited to those rights provided herein. Operator shall not permit, allow or establish mortgages, deeds of trust, liens, leases, subleases, easements, licenses or any other encumbrance of any nature against the Facility, the Property or any other property owned by District.

4. District Regulations. Operator acknowledges that the Facility is part of Freedom Park. Accordingly, Operator agrees that it shall operate and maintain the Facility in a manner consistent with the ordinances, rules, regulations, and policies established by the District for parks and facilities within the District ("District Rules"), including Freedom Park, as outlined in District Ordinance 8, as amended from time to time. In the event District determines that Operator is not operating the Facility in a manner consistent with District Rules, District shall so advise Operator concerning the inconsistencies, and Operator must immediately change its operations to conform with District Rules. To the extent that District Rules are inconsistent with the terms of this Agreement, the terms of this Agreement shall prevail.

5. Term of Agreement. The term of this Agreement shall be three (3) years, commencing on September 1, 2022 and terminating August 31, 2025. The parties shall then meet to discuss any potential extension.

On the expiration or termination of this Agreement, Operator shall promptly surrender and

deliver the Facility to District in good condition and repair subject to reasonable wear and tear and shall surrender all keys to the Facility or, in the event of the loss of any keys, Operator shall reimburse District for the cost of replacing same. At the expiration of this Agreement, if Operator holds over for any reason, it is agreed, in absence of a written agreement to the contrary, tenancy shall then be from month-to-month only and not a renewal of this Agreement, or an extension for any further term.

6. Fees to Be Charged. The fees charged by Operator shall be generally consistent with charges made by similar facilities in Ventura County and Southern California. Operator must provide District with a fee schedule and notice of any fee changes thirty (30) days in advance of the proposed implementation of revised fees.

7. Utility Payments by Operator.

A. Operator will make utility payments directly to utility company for all utilities except water used by Operator at the Facility and is solely responsible for all costs in connection therewith.

B. Operator shall pay District a monthly water fee in the amount of \$50 per month for the duration of this Agreement.

C. Operator shall pay District a monthly fee for the portable toilet. The Fee shall be the amount of the bill split between the Operator, Derby Darlins as a renter of the hockey rink and Operator of Roller Hockey Facility.

Utility Payments are due and payable to District monthly in arrears on the first (1st) day of each calendar month, and no later than the seventh (7th) day of the calendar month for the prior month. For example, Operator shall pay all utility payments due to District no later than October 7 for month ending September 30. If utility payments are received after the 7th day of any month, a late \$100 late fee shall be charged and payable immediately.

8. Direct Cost Services. Operator is solely responsible for all costs associated with services and/or equipment provided or used at the site for the benefit of the Operator's site users as needed to operate the Facility. Examples of such services are: porta-potty/sink rentals and service and gardening. The District is not fiscally responsible for direct cost services to the site.

9. Maintenance of Facility. The parties acknowledge and agree that it is critically important that the Facility, including all improvements, equipment and fixtures located thereon or used in connection with the Facility, be maintained by Operator in good, safe and sanitary condition and repair throughout the term of this Agreement. Operator agrees to diligently comply with this obligation, at Operator's sole cost. Operator shall on a daily basis remove and dispose of (in a proper manner acceptable to District) trash and debris from the track and throughout the Facility.

In the event the Facility, or any improvements, equipment or fixtures therein are damaged or destroyed by any cause, including, but not limited to damage or destruction from natural causes such as fire, explosion, smoke, lightning, flood, earthquake, and storm, and also including but not limited to damages resulting from human acts such as vandalism, mischief, riot or public disorder, aircraft and vehicular damages, and similar causes, regardless of whether said cause of damage or destruction was within or outside the control of Operator, except for damage

or destruction caused by the active or sole negligence or willful misconduct of District, its agents or employees, Operator shall promptly secure the area affected and repair such damage or destruction to restore the Facility to its condition prior to such damage or destruction as quickly as repairs or restoration can reasonably be made. All costs associated with the repair or restoration of the Facility shall be borne solely by the Operator and/or its insurance.

At the conclusion or termination of this Agreement for any reason (including default), any and all moveable improvements, equipment and supplies present at the Facility shall be the property of Operator and must be removed within twenty (20) days after termination of this Agreement. Operator shall not remove any improvements, fixtures or equipment which have become a physical part of the Facility. All such items which have become a part of the Facility shall be delivered to District in a state of good condition and repair. Operator shall also deliver to District all monies and other property due to District under this Agreement. Operator shall also deliver to District all materials, property, copies of records, and other items which would have been provided to District or which District would have been permitted to inspect pursuant to Section 15.

10. Alterations to Facility. No alterations or improvements to the Facility shall be made or constructed by Operator, without the advance written consent of District. Consent may be withheld by District in its sole discretion.

The cost of any and all alterations or improvements to the Facility during the term of this Agreement (including but not limited to the preparation and submission of plans and drawings, timelines, construction, permits, insurance and bonds) shall be borne solely by Operator.

Prior to any such work, Operator shall submit to District for review plans, specifications and drawings detailing the proposed work. The plans, specifications and drawings shall be submitted in a form satisfactory to District. The District shall review those plans and specifications in a timely manner which shall not exceed 30 days from the date of submittal by BMX Operator. District, in its sole discretion, may require Operator to make changes to the plans, specifications or drawings. Although District, in such event, may review, require changes to, and ultimately in its sole discretion approve such plans, specifications and drawings, District shall bear no liability or responsibility whatever for the plans, specifications or drawings. The Operator expressly agrees to indemnify the District for any claims in connection with such alterations or improvements relating to the payment of prevailing wages. Any project having an estimated value greater than \$25,000 will be required to follow the District's formal bidding procedures.

As a condition to receiving approval to make such alterations or improvements to the Facility, Operator shall provide District with: (a) payment and performance bonds equal to one hundred percent (100%) of the estimated cost of the work; and (b) liability insurance coverage in scope, amount and form as required by District. Operator shall additionally comply with any other conditions imposed by District or otherwise required by law related to the installation of alterations and improvements and the work to be performed, including but not limited to: (a) any and all laws, ordinances, rules, regulations, requirements and permit conditions imposed by the County of Ventura Department of Airports, the Federal Aviation Administration and the City of Camarillo, given the proximity of the Facility to the Camarillo Airport, and (b) (if applicable) the payment of prevailing wages. Upon receiving approval, Operator shall diligently prosecute the

work to completion. Operator shall procure from all contractors, subcontractors and materials suppliers full and unconditional releases of any liens or claims against the Facility associated with work performed or materials supplied.

11. Insurance and Indemnity.

A. Liability Insurance: Operator shall procure and maintain throughout the term of this Agreement Commercial General Liability insurance in a form and with coverage acceptable to District. **District and District Parties shall be named as an “Additional Insured” under said insurance, and the insurance carrier shall issue an “Additional Insured” Endorsement in favor of District and District Parties. An endorsement evidencing said coverage shall be provided to the District prior to Operator’s commencement of operation of the Facility under the terms of this Agreement.** District shall not be responsible for the insufficiency of any insurance policy provided by Operator pursuant to this Agreement, and District shall have no liability to Operator as a result of the inadequacy of said insurance. The policy(ies) shall specify that: (a) Operator’s insurance carrier is obligated not to cancel or reduce the coverage of such insurance without giving District thirty (30) days written notice of its intention to do so; and (b) with regard to any claims arising out of the activities described in this Agreement, Operator’s insurance shall be primary insurance as respects District and District’s Parties. Any liability insurance of District shall be excess of Operator’s insurance and shall not contribute with it. Operator shall require all contractors and subcontractors performing alteration or improvement work on the Facility in accordance with Section 10 to provide the same indemnification covenants and insurance coverage protective of Operator and District, as provided herein.

B. Indemnification/Hold Harmless: Operator agrees to indemnify, defend and hold harmless District and District Parties from and against any and all claims, liability, damages, losses, expense and costs (including costs and reasonable attorney fees in litigation) of any nature, including personal injury, death, or property damage, sustained by any person (whether BMX participant, spectator, or third party) in connection with or arising out of the design and operation of the Facility and the public’s use thereof, or in connection with Operator’s performance of its obligations hereunder or Operator’s failure to comply with such obligations, except such loss or damage caused by the active negligence, sole negligence or willful misconduct of District. These indemnification provisions shall survive the term of this Agreement.

Specific insurance requirements can be found in Attachment 2 – PVRPD Insurance Requirements and are subject to change based on the District Risk Management guidelines.

12. Use of photographs and video. Operator consents to and grants the District the right, without compensation to Operator, to make and use video tape/digital, etc. recordings and still photographs of programs, classes and competitions of participants, spectators (including minor children) and facility employees and volunteers. Operator waives any right to review or approve the finished product or the use to which it may be applied.

13. License Fee Payment by Operator. Operator shall pay to District, as a license fee for use and operation of the Facility, the monthly payments described below.

September 1, 2022 to August 31, 2023 - \$400 per month

September 1, 2023 to August 31, 2024 - \$425 per month

September 1, 2024 to August 31, 2025 - \$450 per month

The license fee is due and payable to District monthly in arrears on the first (1st) day of each calendar month, and no later than the seventh (7th) day of the calendar month for the prior month. For example, Operator shall pay all license fees due to District no later than October 7 for month ending September 30.

A monthly Facility attendance record shall be delivered to the District with the monthly license fee payment.

If a license fee payment is received after the 7th day of any month, a \$100 late fee shall be charged and payable immediately.

14. Accounting Records: Operator shall maintain, at its sole expense, a comprehensive system of books, records, and accounts concerning its activities at the Facility. Such books, records, and accounts shall be kept on a fiscal year basis and based on the cash method of accounting in accordance with generally accepted accounting principles, consistently applied. Such books, records, and accounts shall include, without limitation, vouchers, questionnaires, and similar materials of general distribution, which are not expected to have a material effect upon the construction and operation of the Facility or the District. Operator shall retain such records for a period of not less than three years. At District's request, Operator shall make its books, records and accounts available at the Facility or other location as specified by District for inspection by District and District's Parties during business hours.

Promptly upon Operator obtaining knowledge thereof, a statement describing all significant occurrences and circumstances (including significant personal injury to or death of any Facility patron, spectator, bystander, or third party) affecting the Facility or its operation, and all occurrences and circumstances affecting in any manner District's rights under this Agreement, shall be given to District. Without limiting the foregoing, Operator shall promptly notify District in writing of a claim or the commencement of any legal actions or proceedings affecting, or relating to, the Operator, the Facility, or the operations of Operator under this Agreement. In addition to the reports and records described in this paragraph and elsewhere in this Agreement, Operator at its sole expense shall furnish to District such further information concerning the operation, management, promotion, repair, servicing, and maintenance of the Facility, that may be requested from time to time by District.

15. Inspection of Facility. District and District Parties shall have the right to enter upon the Facility at any and all reasonable times for the purpose of inspection of the Facility, including the Operator's improvements, equipment and fixtures, and for observation of Operator's activities. During these inspections District and District Parties shall have the right to utilize photographic devices and other instruments for recording conditions and events taking place in the Facility.

16. Relationship of Parties: The relationship of Operator to District under this Agreement shall be that of an independent contractor using District property for the operation of Operator's independent business. Nothing contained in this Agreement shall be construed as creating a partnership or joint venture between the parties, and nothing in this Agreement shall be construed as creating a relationship of principal and agent. Operator shall have no right to

obligate District in any manner whatsoever. Operator is and shall be an independent business solely responsible for performance of the obligation assumed by Operator under this Agreement and solely responsible for the operation and maintenance of the Facility. All personnel employed in connection with Operator's use and operation of the Facility shall be employees of Operator, and they shall have no employment relationship with District. Operator shall be solely responsible for all matters concerning the employment of such individuals, including, but not limited to, the hiring, promoting, supervision, training, discharge, and compensation of such personnel. Operator shall be solely responsible for establishing policies and procedures relating to the employment of such personnel.

Notwithstanding the forgoing, Operator shall not discriminate against any employee because of race, creed, color, age, sex, sexual orientation, marital status, national origin, or handicap or disability. Such action shall include, but not be limited to, the following: employment, upgrading, promotion, demotion, or transfer, recruitment or recruitment advertising, layoff or determination, rates of pay or other forms of compensation, and selection for training, including apprenticeship.

Operator agrees to post in conspicuous places, available to employees and applicants for employment, a notice setting forth the provisions of this nondiscrimination clause. In its operation of the Facility Operator shall comply with the provisions of the California "Unruh Civil Rights Act" and the "California Fair Employment and Housing Act" together with all amendments and recodifications of said laws.

17. Safety: Operator must fingerprint and/or perform adequate background screening (*LiveScan*, for example) for all coaches/volunteers associated with the Operator as required by all applicable laws. Operator shall provide the District with a signed letter or documentation on an annual basis stating they have complied with performing a screening process. (Attachment 3)

AB 2007 compliance requires that "[a] youth sports organization that elects to offer an athletic program" must comply with the items located in **Attachment 4 – AB 2007 Concussions and Other Head Injuries**. A letter must be submitted each year to the **District** that the **Operator** has complied with these regulations.

Operator shall submit a completed Accident/Incident Report (**Attachment 5 – Accident/Incident Report**) for any participants, spectators, volunteers, judges/referees or paid staff that may result in any claims against the **District** within 72 hours of the accident/incident or when the **Operator's** volunteer and/or staff is first alerted to the incident.

18. Default: If Operator defaults in its performance of any provision contained in this Agreement after any applicable cure period, District may exercise any and all remedies which may be available to District pursuant to law, and District may exercise any and all remedies granted to District pursuant to this Agreement. Each and every covenant and Agreement contained herein to be kept and performed by Operator is expressly made a condition of this Agreement, and upon a breach thereof, if not promptly remedied by Operator, District may exercise any and all rights of entry upon the Facility and may terminate this Agreement.

In the event District determines that Operator has defaulted in any of its obligations under this Agreement, District shall deliver to Operator a written notice advising Operator of the provisions of this Agreement in which it is in default. The notice serves as notification that

Operator shall have a right to remedy its defaults in performance of its obligations under this Agreement in accordance with the provisions of this paragraph. In the event Operator defaults in the payment of any funds to District, Operator shall have a period of seven (7) days within which to remedy the default. If Operator defaults in the performance of any other obligation under this Agreement, Operator shall have a period of thirty (30) days within which to remedy such default. If Operator does not remedy a default in its obligations under this Agreement pursuant to the remedy provisions provided above, all rights of Operator to use the Facility shall forthwith cease and terminate upon delivery to Operator of a notice of termination by the District.

In the event of termination for default, Operator shall receive no compensation for construction of any Facility improvements made by Operator. Upon termination of this Agreement, Operator shall remain liable for its obligations that have accrued up to and including the termination date and shall promptly pay to District all amounts due under the terms of this Agreement. Such payment shall be made as soon after the effective date of the termination, as such amounts are determinable upon the effective date of the termination.

19. Operation of Facility. In addition to its other covenants contained herein, Operator agrees to operate the Facility in an efficient manner as a high-quality BMX Bicycle Track facility, and at all times maintain some organization and personnel sufficient to enable it to carry out all of its duties, obligations, and functions under this Agreement. Operator shall properly supervise and direct its employees and other parties implementing the performance of Operator's duties, obligations and functions under this Agreement and all applicable laws. Operator is solely responsible for the performance of its employees and other parties. Further, Operator shall directly supervise, manage, and at Operator's sole expense, be responsible for all independent contractors, suppliers, and entities engaged in the operation, repair, maintenance, servicing, and promotion of Operator's business and activities on the premises and in any other activity in connection with the Facility and any other activity within the scope of this Agreement including, without limitation, those contractors, suppliers and entities: (a) necessary for the provision of all utility, repair, restoration, maintenance, and security services, (b) necessary or desirable for the efficient operation of a high quality "BMX Bicycle Track" facility, and (c) otherwise required by this Agreement. Without limiting the application of any higher standards required pursuant to (a), (b), and (c) immediately above, Operator at its sole expense shall comply with all requirements of the insurance policies and insurance carriers (including District's carriers) insuring the Facility.

20. Permits and Authorizations. Operator at its sole expense shall obtain and keep in full force and effect all necessary business licenses, permits, consents, and authorizations which may be necessary for the construction, maintenance, operation, management, promotion, repair, servicing, and occupancy of the Facility and for the performance by Operator of its duties and obligations under this Agreement. All such licenses, permits, consents, and authorizations shall be in the name of Operator.

Operator covenants that it shall take all actions necessary to establish and remain a corporation in good standing and shall comply with all applicable California law related thereto.

21. Notices: Any notice required or permitted under this Agreement shall be in writing and be personally delivered or sent by registered or certified mail, postage prepaid, return receipt requested, and addressed as follows, and shall be deemed to have been given upon the date of delivery (or refusal to accept delivery) as indicated on the return receipt:

To the District
Pleasant Valley Recreation and Park District
1605 E. Burnley Street
Camarillo, California 93010
Attention: General Manager
motten@pvrpd.org
805-482-1996 x114

To the Operator
Freedom Park BMX Raceway, Inc.
c/o Andrea Huvard
135 La Crescenta Drive
Camarillo, CA 93010
huvard@callutheran.edu
805-312-6130

Either party may from time to time specify in writing to the other party a different address to which notice shall be sent. All notices sent to that party following the giving of such notice shall be sent to the new address.

22. Assignment. The rights and obligations of the Operator shall not be assigned or transferred in any manner, either voluntarily or by operation of law, unless District specifically approves such assignment in writing. Violation of this provision is grounds for immediate termination of this Agreement by the District. District without prior consent of Operator may assign District's rights under this Agreement.

23. Real and Personal Property Taxes. Operator shall pay prior to delinquency any and all personal property taxes and possessory interest taxes attributable to the Facility. (Operator is aware that this license may be subject to possessory interest taxes as assessed by the County of Ventura.) Operator shall indemnify, defend and hold harmless District against any and all such taxes, fees, penalties or interest assessed, or imposed against District hereunder. In the event Operator fails to timely pay any tax, assessment, fee, penalty or interest, District, at its option, shall have the right to pay such charge and treat such payment as additional license fees to be charged to Operator and paid by Operator to District within five (5) days after receipt of written notice from District. Operator shall be solely responsible for the payment of all taxes attributable to its operations, including but not limited to, sales taxes and income taxes.

24. Successors and Assigns. Subject to the restrictions on transfers contained in this Agreement, this Agreement shall inure to the benefit of, and be binding upon, the parties and their respective successors and permitted assigns. Whenever in this Agreement a reference is made to any entity or party, such reference shall be deemed to include a reference to the successors and permitted assigns of such entity or party.

25. Waiver. No consent or waiver, express or implied, by any party to or of any breach or default by the other party in the performance by such other party of the obligations of that party under this Agreement shall be deemed or construed to be a consent to or waiver of any breach or default in the performance by such other party of the same or any other obligations of such other party under this agreement. Failure on the part of either party to complain of any act or failure

to act of the other party or to declare the other party in default, irrespective of how long such failure continues, shall not constitute a waiver by such party of the rights thereof under this Agreement.

26. Additional Remedies. The rights and remedies of the parties under this Agreement shall not be mutually exclusive. The exercise of one or more of the provisions of this Agreement shall not preclude the exercise of any other provisions of this Agreement.

27. Entire Agreement. This Agreement represents the entire Agreement between the parties with respect to the subject matter of this Agreement and supersedes all prior oral or written Agreements, understandings, representations, and covenants.

28. Severability. If any provisions of this Agreement or the application thereof to any entity or circumstance shall be invalid or unenforceable to any extent, the remainder of this Agreement and the application of such provisions to any other entity or circumstance shall not be affected thereby and shall be enforced to the greatest extent permitted by law.

29. Terminology. All personal pronouns used in this Agreement whether used in the masculine, feminine or neuter gender, shall include the plural, and the plural shall include the singular. Titles of sections in this Agreement are for convenience only and neither limits nor amplifies the provisions of this Agreement. All references in this Agreement to sections shall refer to the corresponding article of this Agreement.

30. Amendment. No change, waiver, discharge or termination of this Agreement or any provision of this Agreement shall be binding upon any party to this Agreement unless it is set forth in a written instrument signed by the party against whom enforcement of change, waiver, discharge or termination is sought.

31. Interpretation. This agreement is the result of negotiations between the parties and each party has had the opportunity to consult with an attorney regarding its provisions. No provision of this agreement shall be construed against or interpreted to the disadvantage of any party by any court or other governmental or judicial authority by reason of such party having or being deemed to have structured, drafted or dictated such provision.

32. Governing Law Venue. This Agreement and the obligation of District and Operator shall be interpreted, construed and enforced in accordance with the laws of the State of California. Any litigation brought by the parties in connection with this Agreement shall be filed in a court of competent jurisdiction in the County of Ventura, State of California.

33. Alcohol and Drugs. At no time shall Operator or any agent thereof sell, give away, or allow the consumption of alcohol or drugs at the Facility or on other property of District.

34. Recitals. The foregoing Recitals are incorporated herein by reference as if fully set forth.

In witness whereof, District and Operator have executed this Agreement
on (date)_____ at Camarillo, California.

“District”:
Pleasant Valley Recreation and Park District,
a California Special District

By: _____
Mary Otten, General Manager
Date: _____

ATTEST:

Dylan Gunning, Clerk of the Board

“Operator”
Freedom Park BMX Raceway, Inc.
By: _____
Andrea Huvard, President
Date: _____

Attachments to include the following documents:

1. Property Map
2. Insurance Requirements
3. Background Check from USA BMX
4. Certificate of Completion for AB 2007
5. Accident/Incident Report

**PLEASANT VALLEY RECREATION AND PARK DISTRICT
STAFF REPORT / AGENDA REPORT**

TO: BOARD OF DIRECTORS

FROM: MARY OTTEN, GENERAL MANAGER
By: Kathryn Drewry, Human Resources Specialist

DATE: July 6, 2022

SUBJECT: REVIEW AND APPROVE UPDATED JOB DESCRIPTIONS

SUMMARY

District staff periodically reviews job descriptions to ensure they are accurate which can be especially important for the assignment of duties. They are a useful tool that assist supervisors and the employees who perform each job. This year the Recreation Department has updated the job scopes for their current positions.

BACKGROUND

Typically, as part of the budgetary process management, staff reviews job descriptions to ensure they remain updated and reflect the current needs of the District. A job description contains the following components: job title, job purpose, job duties and responsibilities, required qualifications, preferred qualifications and working conditions. Job descriptions describe jobs in general terms. They do not provide an exhaustive list of specific tasks to be performed. Instead, they provide a broad explanation of the job as it exists now.

ANALYSIS

Upon review of the Recreation Department's job descriptions, it was determined that all needed updates. Each description was updated to exclude redundancies and minimize the need for outdated duties.

FISCAL IMPACT

There is currently no fiscal impact.

RECOMMENDATION

It is recommended that the Board approve the proposed updated job descriptions.

ATTACHMENTS

- 1) Development Analyst (4 pages)
- 2) Aquatic Center Assistant Manager (4 pages)
- 3) Aquatic Specialist (5 pages)
- 4) Lifeguard/WSI (4 pages)
- 5) Recreation/ Senior Leader (5 pages)
- 6) Recreation Coordinator (5 pages)
- 7) Recreation Services Manager (5 pages)
- 8) Recreation Specialist (5 pages)
- 9) Recreation Supervisor (5 pages)
- 10) Recreation Supervisor – Aquatics (6 pages)

Job Title:	Development Analyst	Category:	Management
Department:	Recreation	Prepared Date:	June 2022
Reports To:	Recreation Manager or as Assigned	Approved by:	Board of Directors
FLSA Status:	Exempt (PTYR Non-Exempt)	Approved Date:	July 6, 2022

SUMMARY: Under general supervision, performs a variety of complex and responsible administrative duties in the areas of fund development and communications. Primary responsibilities are to provide leadership oversight and strategy in three areas: Major Gifts and Advancement, Corporate Relations, and Research and Grant Management. Implements marketing, sales, and revenue development strategies to meet the current and future financial needs of the Pleasant Valley Recreation and Park District. Applies strong leadership vision, creativity and focus to the task of identifying additional sustainable revenue streams. Evaluates and enhances existing resource development and fundraising activities, recommends enhancements to current systems, processes and structure, and collaborates with department leaders to maximize major gifts, corporate relations, and grant revenue.

ESSENTIAL DUTIES AND RESPONSIBILITIES: Includes the following, with a focus of Quality Customer Service being primary for all positions. Will require some holiday, evening, and/or weekend work assignments. Performs additional duties as assigned.

- Develop & manage District marketing strategies and promotional campaigns that build sustainable revenue for the District. This position must collaborate closely with the Foundation for Pleasant Valley Recreation and Parks to coordinate a District-wide understanding of mutual marketing and advertising goals and expectations.
- Align sales and marketing strategy with District-wide planning and business planning efforts.
- Lead and plan the work of sales and marketing staff to effectively plan, organize and implement revenue strategies that include market segment profiles, perceptions of District value propositions, and long and short term programs and campaigns designed to improve and/or maintain market perceptions. Stimulate public interest and patronage of District facilities, programs and events.
- Provide oversight and guidance to effectively manage the District's collaborations and relationships with supporting non-profits, and guide strategy for increasing the return on investment from gifting programs, fulfillment, grants, planned giving and individual giving activities.
- Establish an effective community-based marketing corporate relations program that includes the cultivation of positive relationships with business and industry that heighten interest in their financial support of the District and Foundation.
- Build collaborative relationships and maintain communication to develop an understanding of the operational needs and expectations of key departments, the District's role in the community at large, and the goals of the individual program areas.
- Develop and lead the fund development, marketing strategies to meet the goals and objectives of both the District as well as the Foundation.
- Meet prospective donors and supporters on a continual basis to establish effective communications with them.
- Grow the donor program including identification, cultivation and solicitation of donors.
- Maintain gift and/or donor-based database, tracking system and recognition program.
- Make public appearances/accept speaking engagements to share information about the District and Foundation.
- Support website maintenance and management, update regularly with relevant promotions and events
- Manage social media systems and postings for the Foundation & District.
- Oversee grants including research, proposal writing, and reporting requirements.

QUALIFICATIONS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Working to considerable knowledge of: principles and techniques of administrative and fiscal analysis, organization and staffing.
- Working to considerable ability to: prepare a variety of reports and recommendations, communicate orally and in writing, establish and maintain effective working relationships with co-workers, the general public and donors.
- Thorough knowledge of: current records technology, State code, District ordinances, and regulations governing the transcription, maintenance and disposition of official records.
- Thorough skills to: use a variety of current computer-based document transcription, storage, and retrieval systems and various types of standard office equipment.

EDUCATION and/or EXPERIENCE: Bachelor's Degree in Business, Advertising, Communications, Fund Development or related field with minimum of four (4) years of progressive experience, administrative responsibility, or equivalent combination of education and experience.

CERTIFICATES, LICENSES, REGISTRATIONS: Position may require an average amount of driving, therefore, must have daily access to a vehicle, and possess a valid California driver's license, and maintain appropriate insurance on vehicle used in the course of business duties. Position may involve driving to events as a representative of the District. CPR and First Aid Certification required no later than six (6) months after employment. Successful completion of tuberculosis, drug and alcohol screening and criminal justice fingerprint clearance/background check required.

PHYSICAL DEMANDS: Mobility: Frequent use of office equipment; frequent sitting for long periods of time; occasional bending or squatting. Lifting: frequently up to 10 pounds; occasionally up to 25 pounds. Vision: constant use of overall vision, frequent reading and close-up work; occasional color and depth vision. Dexterity: frequent repetitive motion; frequent writing; frequent grasping, holding and reaching. Hearing/Talking: frequent hearing and talking, in person and on the phone. Emotional/Psychological: frequent concentration; frequent public and/or coworker contact; occasional working alone. Environmental: frequent exposure to noise.

WORK ENVIRONMENT: Work is performed in a typical temperature-controlled office environment subject to typical office noise. The positions will mostly be in a fast-paced office environment requiring the ability to multi-task. Positions may require occasional weeknights and weekends or schedule adjustments due to special events and/or meetings.



Pleasant Valley Recreation and Park District Job Description

Job Title: Development Analyst
Department: ~~Administration~~ Recreation
Reports To: Recreation Manager or Assigned
FLSA Status: Exempt (PTYR Non-Exempt)

Category: Management
Prepared Date: ~~March 2020~~
Approved by: Board of Directors
Approved Date: ~~May 6, 2020~~

SUMMARY: Under general supervision, performs a variety of complex and responsible administrative duties in the areas of fund development and communications. Primary responsibilities are to provide leadership oversight and strategy in three areas: Major Gifts and Advancement, Corporate Relations, and Research and Grant Management. Implements marketing, sales, and revenue development strategies to meet the current and future financial needs of the Pleasant Valley Recreation and Park District. Applies strong leadership vision, creativity and focus to the task of identifying additional sustainable revenue streams. Evaluates and enhances existing resource development and fundraising activities, recommends enhancements to current systems, processes and structure, and collaborates with department leaders to maximize major gifts, corporate relations, and grant revenue.

ESSENTIAL DUTIES AND RESPONSIBILITIES: Includes the following, with a focus of Quality Customer Service being primary for all positions. Will require some holiday, evening, and/or weekend work assignments. Performs additional duties as assigned.

- Develop & manage District marketing strategies and promotional campaigns that build sustainable revenue for the District. This position must collaborate closely with the Foundation for Pleasant Valley Recreation and Parks to coordinate a District-wide understanding of mutual marketing and advertising goals and expectations.
- Align sales and marketing strategy with District-wide planning and business planning efforts.
- Lead and plan the work of sales and marketing staff to effectively plan, organize and implement revenue strategies that include market segment profiles, perceptions of District value propositions, and long and short term programs and campaigns designed to improve and/or maintain market perceptions. Stimulate public interest and patronage of District facilities, programs and events.
- Provide oversight and guidance to effectively manage the District's collaborations and relationships with supporting non-profits, and guide strategy for increasing the return on investment from gifting programs, fulfillment, grants, planned giving and individual giving activities.
- Establish an effective community-based marketing corporate relations program that includes the cultivation of positive relationships with business and industry that heighten interest in their financial support of the District and Foundation.
- Build collaborative relationships and maintain communication to develop an understanding of the operational needs and expectations of key departments, the District's role in the community at large, and the goals of the individual program areas.
- Develop and lead the fund development, marketing strategies to meet the goals and objectives of both the ~~Pleasant Valley Recreation and Park~~ District as well as the Foundation.
- Meet prospective donors and supporters on a continual basis to establish effective communications with them.
- Grow the donor program including identification, cultivation and solicitation of donors.
- Maintain gift and/or donor-based database, tracking system and recognition program.
- Make public appearances/accept speaking engagements to share information about the District and Foundation ~~for Pleasant Valley Recreation and Parks.~~
- Support website maintenance and management, update regularly with relevant promotions and events
- Manage social media systems and postings for the Foundation & District.
- Oversee grants including research, proposal writing, and reporting requirements.



Pleasant Valley Recreation and Park District Job Description

QUALIFICATIONS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Working to considerable knowledge of: principles and techniques of administrative and fiscal analysis, organization and staffing.
- Working to considerable ability to: prepare a variety of reports and recommendations, communicate orally and in writing, establish and maintain effective working relationships with co-workers, the general public and donors.
- Thorough knowledge of: current records technology, State code, District ordinances, and regulations governing the transcription, maintenance and disposition of official records.
- Thorough skills to: use a variety of current computer-based document transcription, storage, and retrieval systems and various types of standard office equipment.

EDUCATION and/or EXPERIENCE: Bachelor's Degree in Business, Advertising, Communications, Fund Development or related field with minimum of four (4) years of progressive experience, administrative responsibility, or equivalent combination of education and experience.

CERTIFICATES, LICENSES, REGISTRATIONS: Position may require an average amount of driving, therefore, must have daily access to a vehicle, and possess a valid California driver's license, and maintain appropriate insurance on vehicle used in the course of business duties. Position may involve driving to events as a representative of the District. CPR and First Aid Certification required no later than six (6) months after employment. Successful completion of tuberculosis, drug and alcohol screening and criminal justice fingerprint clearance/background check required.

PHYSICAL DEMANDS: Mobility: Frequent use of office equipment; frequent sitting for long periods of time; occasional bending or squatting. Lifting: frequently up to 10 pounds; occasionally up to 25 pounds. Vision: constant use of overall vision, frequent reading and close-up work; occasional color and depth vision. Dexterity: frequent repetitive motion; frequent writing; frequent grasping, holding and reaching. Hearing/Talking: frequent hearing and talking, in person and on the phone. Emotional/Psychological: frequent concentration; frequent public and/or coworker contact; occasional working alone. Environmental: frequent exposure to noise.

WORK ENVIRONMENT: Work is performed in a typical temperature-controlled office environment subject to typical office noise. The positions will mostly be in a fast-paced office environment requiring the ability to multi-task. Positions may require occasional weeknights and weekends or schedule adjustments due to special events and/or meetings.

Job Title: Aquatic Center Assistant Manager
Department: Recreation
Reports To: Recreation Supervisor or as assigned
FLSA Status: Non-Exempt

Category: Staff
Prepared Date: June 2022
Approved by: Board of Directors
Approved Date: July 6, 2022

SUMMARY: Under general supervision, this position performs a variety of complex and responsible aquatic and administrative duties to assist management and operation of a fast paced, indoor aquatic center in accordance with District policies and procedures.

ESSENTIAL DUTIES AND RESPONSIBILITIES: Includes the following, with a focus on high quality customer service, in depth knowledge of aquatics and overall facility management and operation. Position will require some holiday, evening and/or weekend work assignments. Performs additional duties as assigned:

- May open, close, secure, and maintain a safe program environment and facility that align with District rules and regulations
- Develop, conduct, promote, supervise, and participate in various aquatic activities, programs, and rentals to include use of equipment, and District reports
- Respond to public inquiries made by telephone, correspondence, or during public meetings about assigned programs while maintaining a professional attitude and appearance
- Demonstrate continuous effort to improve operations, streamline work processes within the aquatic center and other departments
- Perform cash handling duties using basic mathematical calculations with speed and accuracy, receive payment, count money and make change, and prepare District reports
- Will support with marketing/programming material for the Aquatic Center
- Serve as lead support for aquatic staff to include scheduling management, in-service trainings, and lifeguard/programming support.
- Respond to injuries, and preform water rescues by administering First Aid, CPR, and rescue breathing if needed and adhering to District guidelines, policies & procedures
- Will assist in minor maintenance of recreational facilities to include setting up/breaking down equipment in addition to cleaning and stocking facilities

QUALIFICATIONS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Working knowledge of: common office practices; basic office equipment and software.
- Must possess excellent oral and written communication skills. Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals. Ability to write routine reports and correspondence. Ability to speak before groups of customers or employees of organization.

EDUCATION and/or EXPERIENCE: A High School Diploma or GED with minimum of two years of lifeguard experience, or equivalent combination of education and experience. Previous supervisory, facility management, or college coursework highly desirable.

CERTIFICATES, LICENSES, REGISTRATIONS: American Red Cross certifications: Lifeguard, First Aid and CPR for the Professional Rescuer with Title 22 required and obtain Water Safety Instructor (WSI) certification within 12 months of employment; American Red Cross Lifeguard Instructor certification, Certified Pool Operator or Aquatic Facility Operator desirable. Position requires some amount of driving, therefore, must own a vehicle or have daily access to a vehicle, and possess a valid Driver's License with a clean California Department Motor Vehicle record, and maintain appropriate insurance on vehicle used in the course of business duties. Position may involve driving to events as a representative of the District.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The employee is required to lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus. While performing the duties of this job, the employee is regularly required to stand, walk, sit, use hands to finger, handle, or feel; reach with hands and arms; stoop, kneel, crouch, or crawl; talk or hear and taste or smell; climb and balance.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Works inside and outside in seasonal climate and weather conditions; works on slippery surfaces, where water and swimming pool chemicals are frequently encountered; may drive a vehicle to different locations; works irregular schedules including evenings, weekends, and holidays; and subject to emergency situations.



Pleasant Valley Recreation and Park District Job Description

Job Title: _____ Aquatic Center Assistant Manager
Department: _____ Recreation
Reports To: _____ Recreation Supervisor or as assigned
FLSA Status: _____ Non-Exempt

Category: _____ Staff
Prepared Date: ~~February 2019~~
Approved by: Board of Directors
Approved Date: ~~March 6, 2019~~

SUMMARY: Under general supervision, this position performs a variety of complex and responsible aquatic and administrative duties to assist management and operation of a fast paced, indoor aquatic center in accordance with District policies and procedures.

ESSENTIAL DUTIES AND RESPONSIBILITIES: Includes the following, with a focus on high quality customer service, in depth knowledge of aquatics and overall facility management and operation. Position will require some holiday, evening and/or weekend work assignments. Performs additional duties as assigned:

- May open, close, secure, and maintain a safe program environment and facility that align with District rules and regulations
- Develop, conduct, promote, supervise, and participate in various aquatic activities, programs, and rentals to include use of equipment, and District reports
- Respond to public inquiries made by telephone, correspondence, or during public meetings about assigned programs while maintaining a professional attitude and appearance
- Demonstrate continuous effort to improve operations, streamline work processes within the aquatic center and other departments
- Perform cash handling duties using basic mathematical calculations with speed and accuracy, receive payment, count money and make change, and prepare District reports
- Will support with marketing/programming material for the Aquatic Center
- Serve as lead support for aquatic staff to include scheduling management, in-service trainings, and lifeguard/programming support.
- Respond to injuries, and perform water rescues by administering First Aid, CPR, and rescue breathing if needed and adhering to District guidelines, policies & procedures
- Will assist in minor maintenance of recreational facilities to include setting up/breaking down equipment in addition to cleaning and stocking facilities
- ~~Represent self, District and Aquatic Center in a professional manner.~~
- ~~Possess excellent oral and written communication skills.~~
- ~~Possess strong math skills with the ability to apply basic addition and subtraction as well as calculate figures and amounts such as percentages, discounts, and fractions with a high degree of accuracy and detail.~~
- ~~Possess excellent cash handling skills to prepare and complete daily cash report and deliver money to bank.~~
- ~~Accurately check biweekly timecards for aquatic staff and submit to supervisor.~~
- ~~Plan, coordinate and conduct staff trainings and in-services to a team of 25-50 lifeguards in coordination with the Recreation Supervisor.~~
- ~~Prepare and review weekly employee schedules using online scheduling system.~~
- ~~Manage overall operation of aquatic center, staff, daily activities and programs.~~
- ~~Organize and manage large year round comprehensive swim lesson program.~~
- ~~In coordination with Recreation Supervisor – plan, develop and conduct a variety of aquatic related activities, programs, classes and events.~~
- ~~Schedule and arrange facility activities, rentals, maintain records, prepare invoices, prepare and submit program evaluations and department reports.~~
- ~~Prepare a variety of brochures, calendars, posters, flyers and related communication material to market District programs.~~
- ~~Assist with reviewing and proofing the District Activity Guide, website, brochures and other related material.~~



Pleasant Valley Recreation and Park District Job Description

- ~~Ensure the application of and compliance with established District Policies and Procedures.~~
- ~~Observes safety and security procedures; reports potentially unsafe conditions; uses equipment and materials properly.~~
- ~~Maintain an open and effective system of communication throughout the Aquatics Division and other divisions within the Recreation Services Department.~~
- ~~Successfully and accurately learn and use District online registration system.~~
- ~~Work cohesively with other Departments within the Pleasant Valley Recreation and Park District.~~
- ~~Perform a variety of miscellaneous duties such as answering phones, typing correspondence, data entry, picking up supplies needed for activities, collecting fees, Lifeguard and teach swim lessons when needed.~~
- ~~Perform other duties as assigned.~~

QUALIFICATIONS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Working knowledge of: common office practices; basic office equipment and software.
- Must possess excellent oral and written communication skills. Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals. Ability to write routine reports and correspondence. Ability to speak before groups of customers or employees of organization.

EDUCATION and/or EXPERIENCE: A High School Diploma or GED with minimum of two years of lifeguard experience, or equivalent combination of education and experience. Previous supervisory, facility management, or college coursework highly desirable.

CERTIFICATES, LICENSES, REGISTRATIONS: American Red Cross certifications: Lifeguard, First Aid and CPR for the Professional Rescuer with Title 22 required and obtain Water Safety Instructor (WSI) certification within 12 months of employment; American Red Cross Lifeguard Instructor certification, Certified Pool Operator or Aquatic Facility Operator desirable. Position requires some amount of driving, therefore, must own a vehicle or have daily access to a vehicle, and possess a valid Driver's License with a clean California Department Motor Vehicle record, and maintain appropriate insurance on vehicle used in the course of business duties. Position may involve driving to events as a representative of the District.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The employee is required to lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus. While performing the duties of this job, the employee is regularly required to stand, walk, sit, use hands to finger, handle, or feel; reach with hands and arms; stoop, kneel, crouch, or crawl; talk or hear and taste or smell; climb and balance.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Works inside and outside in seasonal climate and weather conditions; works on slippery surfaces, where water and swimming pool chemicals are frequently encountered; may drive a vehicle to different locations; works irregular schedules including evenings, weekends, and holidays; and subject to emergency situations.

Job Title: Aquatic Specialist
Department: Recreation
Reports To: Recreation Supervisor or as assigned
FLSA Status: Non-Exempt

Location: Aquatic Center
Prepared Date: June 2022
Approved by: Board of Directors
Approved Date: July 6, 2022

SUMMARY: Under general supervision, conducts programs and coordinates activities of paid and volunteer Recreation/Aquatic Division personnel at the Pleasant Valley Aquatic Center in order to provide opportunities and encourage and promote a healthy lifestyle for community residents.

ESSENTIAL DUTIES AND RESPONSIBILITIES: Includes the following, with a focus of quality customer service being primary for all positions. Position will require some holiday, evening and/or weekend work assignments. Perform other duties as assigned.

- Directly supervise and manage, part-time employees, contracted instructors, and volunteers. To include onboarding, training, scheduling, initial review of timecards, H.R related items while adhering to District guidelines, policies, and procedures
- Develop, conduct, promote, supervise, manage, and participate in various activities, programs, events, and rentals to include use of equipment, facility management and programming, while maintaining records, preparing evaluation reports on programs and maintain district reports
- Will provide support with marketing/programming material for recreational programs to include public relations, print materials, and digital media
- Will open, close, secure, setup/break-down and maintain a safe program environment and facilities that align with District rules and regulations
- Respond to public and internal inquiries made by telephone, correspondence, or during public meetings about activities, programs, and events while maintaining a professional attitude and appearance
- Evaluate programs and facilities to ensure optimum utilization and service to community to ensure recreation programs meet the needs of the community of all ages and abilities, while implementing market driven initiatives
- Demonstrate continuous effort to improve operations, streamline work processes within the District and outside organizations
- Present to the Board of Directors on specific activities, events, and programs and provide input and data on projects to the Recreation Supervisor for Staff Reports
- Perform cash handling duties using basic mathematical calculations with speed and accuracy, receive payment, count money and make change, and prepare District reports
- Respond to injuries by administering First Aid, CPR, and rescue breathing if needed and adhering to District guidelines, policies & procedures
- Maintain communications and effective working relationships with co-workers, supervisors, other governmental agencies non-profit organizations, civic groups, elected and appointed officials, community groups and the public-at-large
- Under supervision assures that areas of responsibility are within the budget; performs cost control activities; monitors revenues and expenditures to assure sound fiscal control; provides information and data for the preparation of budget
- Attend and participate in professional group meetings/training staying abreast of new trends and innovations in the field of recreation and parks

QUALIFICATIONS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Thorough to comprehensive knowledge of: operations, services and activities of parks and recreation programs; principles and practices of recreation program development and administration; marketing theories, principles and practices as related to recreation services; principles of budget preparation and control; procurement practices; principles of supervision, training, and performance evaluation.

- Thorough to comprehensive ability to: read, analyze, and interpret documents in area of expertise, technical procedures, or government regulations; write reports, correspondence and procedure manuals; communicate effectively in written and oral form; present information and respond to questions.
- Knowledge of: principles and practices of planning, developing and directing creative and innovative aquatics programs; principles and practices of water safety, swim instruction, lifeguarding, first aid and CPR instruction; regulations, techniques and procedures pertaining to the operation and maintenance of public swimming pools and aquatic facilities.

EDUCATION and/or EXPERIENCE: Recommended Associates Degree in Recreation Management, Business, Communications, Public Administration, Sociology or a related field with minimum of two years of progressive experience, management responsibility, working with the public or equivalent combination of education and experience. A Bachelor's Degree is preferred. Previous experience working within the field of recreation or program development is desirable, or equivalent combination of education and experience.

CERTIFICATES, LICENSES, REGISTRATIONS: Required certificates include: Current American Red Cross (ARC) certifications in Lifeguarding, CPR, First Aid & Oxygen Administration; Title 22; ARC Lifeguard Instructor; CPR for the Professional Rescuer, Water Safety Instructor (WSI), and preferred certifications include: Water Safety Instructor Trainer (WSIT), and Emergency Response Trainer. Position requires average amount of driving, therefore, must have daily access to a vehicle, and possess a valid Driver's License, and maintain appropriate insurance on vehicle used in the course of business duties. Position may involve driving to events as a representative of the District. Successful completion of tuberculosis, drug and alcohol screening and criminal justice fingerprint clearance/background check required.

PHYSICAL DEMANDS: Swimming sufficient to perform lifesaving techniques and rescues; travels across wet, sloping surfaces; vision and hearing sufficient to and communicate across a noisy public swimming pool; speaking sufficient to exchange information in person, on the telephone, or at formal presentations; dexterity of hands and fingers to operate pool equipment; bending, stooping, reaching, kneeling, or crouching; sitting or standing for extended periods of time; and lifts, pushes and pulls 50 pounds when responding to emergency lifesaving situations. **Hazards:** Chemicals associated with a swimming pool; contact with blood, other body fluids, and communicable diseases; and slippery, uneven surfaces.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Works inside and outside in seasonal climate and weather conditions; works on slippery surfaces, where water and swimming pool chemicals are frequently encountered. This position may require overtime and adjusted schedules for special events; and subject to emergency situations.



Pleasant Valley Recreation and Park District Job Description

Job Title: Aquatic Specialist
Department: Recreation
Reports To: Recreation Supervisor or as assigned
FLSA Status: Non-Exempt

Location: Aquatic Center
Prepared Date: March 2020
Approved by: Board of Directors
Approved Date: May 6, 2020

SUMMARY: Under general supervision, conducts programs and coordinates activities of paid and volunteer Recreation/Aquatic Division personnel at the Pleasant Valley Aquatic Center in order to provide opportunities and encourage and promote a healthy lifestyle for community residents.

ESSENTIAL DUTIES AND RESPONSIBILITIES: Includes the following, with a focus of Quality Customer Service being primary for all positions. Position will require some holiday, evening and/or weekend work assignments. Perform other duties as assigned.

- Directly supervise and manage, part-time employees, contracted instructors, and volunteers. To include onboarding, training, scheduling, initial review of timecards, H.R related items while adhering to District guidelines, policies, and procedures
- Develop, conduct, promote, supervise, manage, and participate in various activities, programs, events, and rentals to include use of equipment, facility management and programming, while maintaining records, preparing evaluation reports on programs and maintain district reports
- Will provide support with marketing/programming material for recreational programs to include public relations, print materials, and digital media
- Will open, close, secure, setup/break-down and maintain a safe program environment and facilities that align with District rules and regulations
- Respond to public and internal inquiries made by telephone, correspondence, or during public meetings about activities, programs, and events while maintaining a professional attitude and appearance
- Evaluate programs and facilities to ensure optimum utilization and service to community to ensure recreation programs meet the needs of the community of all ages and abilities, while implementing market driven initiatives
- Demonstrate continuous effort to improve operations, streamline work processes within the District and outside organizations
- Present to the Board of Directors on specific activities, events, and programs and provide input and data on projects to the Recreation Supervisor for Staff Reports
- Perform cash handling duties using basic mathematical calculations with speed and accuracy, receive payment, count money and make change, and prepare District reports
- Respond to injuries by administering First Aid, CPR, and rescue breathing if needed and adhering to District guidelines, policies & procedures
- Maintain communications and effective working relationships with co-workers, supervisors, other governmental agencies non-profit organizations, civic groups, elected and appointed officials, community groups and the public-at-large
- Under supervision assures that areas of responsibility are within the budget; performs cost control activities; monitors revenues and expenditures to assure sound fiscal control; provides information and data for the preparation of budget
- Attend and participate in professional group meetings/training staying abreast of new trends and innovations in the field of recreation and parks
- ~~Ability to, as assigned, coordinate and work with part-time staff, volunteers, the public and diverse populations.~~
- ~~Develop and conduct assigned programs and activities to achieve goals within available resources; trains, motivates and evaluates assigned part-time staff, reviews progress and recommends changes as needed.~~
- ~~Provide feedback to recreation management; makes presentation to supervisors, boards, civic groups and the general public.~~
- ~~Communicate official plans, policies and procedures to part-time staff and the general public.~~



Pleasant Valley Recreation and Park District Job Description

- ~~Under supervision assures that areas of responsibility are performed within the budget; performs cost control activities; monitors revenues and expenditures in assigned area to assure sound fiscal control; assures effective and efficient use of budgeted funds, personnel, materials, facilities, and time.~~
- ~~Determine work procedures, prepares work schedules for part-time staff, and expedites workflow; studies and standardizes procedures to improve efficiency and effectiveness of operations.~~
- ~~Accurately check biweekly timecards for assigned staff and submit to supervisor.~~
- ~~Plan, coordinate and conduct staff trainings and in-services to a team of 25-50 recreation staff members in coordination with direct supervisor.~~
- ~~Prepare and review weekly employee schedules using online scheduling system.~~
- ~~Assist direct supervisor with the management and overall operation of assigned program and/or center, staff, and daily activities.~~
- ~~Assists in the development and promotion of recreation program including music, dance, arts and crafts, cultural arts, senior services, nature study, swimming, social recreation, special events and games.~~
- ~~Adapt recreation programs to meet needs of the public.~~
- ~~Introduce new program activities, equipment, and materials to customers.~~
- ~~Interpret recreation service to public and participates in community meetings and organizational planning.~~
- ~~Work in teams with administrative or other professional personnel to ensure that recreation is well balanced, coordinated, and integrated with special services.~~
- ~~As assigned, issue written and oral instructions; assign duties and examines work for exactness, neatness, and conformance to policies and procedures.~~
- ~~Performs or assists subordinates in performing duties; adjusts errors and complaints.~~
- ~~Prepare a variety of studies, reports and related information for decision-making purposes.~~
- ~~Prepares attendance, accident and routine accounting reports.~~
- ~~Supervise classes, workshops and activities for persons engaged in the programs and co-sponsored programs. Coordinate part-time staff in the development and implementation of programs.~~
- ~~Perform a variety of miscellaneous duties such as answering phones, typing correspondence, picking up supplies needed for activities, conducting classes, selling tickets, collecting fees, officiating at~~

~~events/classes; making arrangements for rentals and use of facilities, helping set up for classes, events, etc.~~

- ~~Prepares for review a variety of brochures, calendars, letters, posters, news releases, flyers, and related communications regarding programs.~~
- ~~Promote interest and provides information regarding programs to community officials, other recreation officials, community service groups, other departments/divisions, and the general public.~~
- ~~Oversee the custodial maintenance of assigned park or facility.~~
- ~~May serve as a member of various employee committees, as assigned.~~
- ~~Assist in the planning and management of any concession related activities, including design, layout, operation, inventory, contracting and staffing.~~
- ~~Serve as an information resource to other divisions, departments outside agencies, and the general public.~~
- ~~Attend and participate in professional group meetings; stay abreast of new trends and innovations in the field of recreation and parks.~~
- ~~Assist with surveying and educating the community on recreation programs.~~
- ~~Successfully and accurately learn and use District online registration system.~~
- ~~Assist other staff in a variety of special events or special projects.~~
- ~~May require some Holiday, evening, and/or weekend work assignments.~~



Pleasant Valley Recreation and Park District Job Description

QUALIFICATIONS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Thorough to comprehensive knowledge of: operations, services and activities of parks and recreation programs; principles and practices of recreation program development and administration; marketing theories, principles and practices as related to recreation services; principles of budget preparation and control; procurement practices; principles of supervision, training, and performance evaluation.
- Thorough to comprehensive ability to: read, analyze, and interpret documents in area of expertise, technical procedures, or government regulations; write reports, correspondence and procedure manuals; communicate effectively in written and oral form; present information and respond to questions.
- Knowledge of: principles and practices of planning, developing and directing creative and innovative aquatics programs; principles and practices of water safety, swim instruction, lifeguarding, first aid and CPR instruction; regulations, techniques and procedures pertaining to the operation and maintenance of public swimming pools and aquatic facilities.

EDUCATION and/or EXPERIENCE: Recommended Associates Degree in Recreation Management, Business, Communications, Public Administration, Sociology or a related field with minimum of two years of progressive experience, management responsibility, working with the public or equivalent combination of education and experience. A Bachelor's Degree is preferred. Previous experience working within the field of recreation of program development is desirable, or equivalent combination of education and experience.

CERTIFICATES, LICENSES, REGISTRATIONS: Required certificates include: Current American Red Cross (ARC) certifications in Lifeguarding, CPR, First Aid & Oxygen Administration; Title 22; ARC Lifeguard Instructor; CPR for the Professional Rescuer, Water Safety Instructor (WSI), and preferred certifications include: Water Safety Instructor Trainer (WSIT), and Emergency Response Trainer. Position requires average amount of driving, therefore, must have daily access to a vehicle, and possess a valid Driver's License, and maintain appropriate insurance on vehicle used in the course of business duties. Position may involve driving to events as a representative of the District. Successful completion of tuberculosis, drug and alcohol screening and criminal justice fingerprint clearance/background check required.

PHYSICAL DEMANDS: Swimming sufficient to perform lifesaving techniques and rescues; travels across wet, sloping surfaces; vision and hearing sufficient to and communicate across a noisy public swimming pool; speaking sufficient to exchange information in person, on the telephone, or at formal presentations; dexterity of hands and fingers to operate pool equipment; bending, stooping, reaching, kneeling, or crouching; sitting or standing for extended periods of time; and lifts, pushes and pulls 50 pounds when responding to emergency lifesaving situations. **Hazards:** Chemicals associated with a swimming pool; contact with blood, other body fluids, and communicable diseases; and slippery, uneven surfaces.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Works inside and outside in seasonal climate and weather conditions; works on slippery surfaces, where water and swimming pool chemicals are frequently encountered. This position may require overtime and adjusted schedules for special events; and subject to emergency situations.

Job Title: Lifeguard
Department: Recreation
Reports to: Recreation Supervisor or as assigned
FLSA Status: Non-exempt

Location: Aquatic Center
Prepared Date: June 2022
Approved by: Board of Directors
Approved Date: July 6, 2022

SUMMARY: Under direct supervision, provides swimming instruction for various levels of classes. Performs life guarding duties for public swimming and instruction.

ESSENTIAL DUTIES AND RESPONSIBILITIES: A focus of quality customer service being primary for all positions. Performs other duties as assigned. Position will require some holiday, evening and/or weekend work assignments. Lifeguard requires the following:

- Instruct and/or assist with instruction of swimming lessons of all ages and abilities by following a structured lesson plan
- Respond to public inquiries made by telephone, correspondence, while maintaining a professional attitude and appearance
- May open, close, secure, and maintain a safe program environment and facility by enforcing District rules and regulations
- Respond to injuries, and perform water rescues by administering First Aid, CPR, and rescue breathing if needed and adhering to District guidelines, policies & procedures
- Will assist in minor maintenance of recreational facilities to include setting up/breaking down equipment in addition to cleaning and stocking facilities
- Perform cash handling duties using basic mathematical calculations with speed and accuracy, receive payment, count money and make change, and prepare District reports

CERTIFICATIONS, LICENSES, REGISTRATIONS: Required American Red Cross certifications (before start of employment): Lifeguarding, Standard First Aid, CPR for the Professional Rescuer and AED. In addition to the required certifications, the American Red Cross WSI (Water Safety Instructor Certification) is preferred for Lifeguards and **required** for Water Safety Instructors. This position requires less than average amount of driving for those over 18 years of age and therefore must have daily access to a vehicle and possess a valid California Driver's License and maintain appropriate insurance on vehicles used in the course of business duties. Position may involve driving to events as a representative of the District. The successful candidate must pass a Department of Justice Live Fingerprint Scan, Background/Reference Check, Screenings for Alcohol, Drug and Tuberculosis prior to the start of employment.

EDUCATION and/or EXPERIENCE: A valid work permit is required if you have not graduated high school or received a GED at time of hire.

- Lifeguard: must be at least 15.5 years old with valid American Red Cross certifications as listed above.
- Water Safety Instructor (WSI): must be at least 16 years old with both Lifeguard and Water Safety Instructor certification; six (6) months experience teaching swim lessons. While performing the duties of a WSI, employees will earn a 5% differential above their regular rate of lifeguard pay.

PHYSICAL DEMANDS: Swimming sufficient to perform lifesaving techniques and rescues; travels across wet, sloping surfaces; vision and hearing sufficient to and communicate across a noisy public swimming pool; speaking sufficient to exchange information in person, on the telephone, or at formal presentations; dexterity of hands and fingers to operate pool equipment; bending, stooping, reaching, kneeling, or crouching; sitting or standing for extended periods of time; and lifts, pushes and pulls 50 pounds when responding to emergency lifesaving situations. The employee must frequently lift and/or move up to 10 pounds, frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 75 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus. Hazards: Chemicals associated with a swimming pool; contact with blood, other body fluids, and communicable diseases; and slippery, uneven surfaces.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Works inside and outside in seasonal climate and weather conditions; works on slippery surfaces, where water and swimming pool chemicals are frequently encountered; may drive a vehicle to different locations; works irregular schedules including evenings, weekends, and holidays; and subject to emergency situations.



Pleasant Valley Recreation and Park District Job Description

Job Title: Lifeguard
Department: Recreation
Reports to: Recreation Supervisor or as assigned
FLSA Status: Non-exempt

Location: Aquatic Center
Prepared Date: April 2018
Approved by:
Approved Date:

SUMMARY: Under direct supervision, provides swimming instruction for various levels of classes. Performs life guarding duties for public swimming and instruction.

ESSENTIAL DUTIES AND RESPONSIBILITIES: A focus of quality customer service being primary for all positions. Performs other duties as assigned. Position will require some holiday, evening and/or weekend work assignments. Lifeguard requires the following:

- Instruct and/or assist with instruction of swimming lessons of all ages and abilities by following a structured lesson plan
- Respond to public inquiries made by telephone, correspondence, while maintaining a professional attitude and appearance
- May open, close, secure, and maintain a safe program environment and facility by enforcing District rules and regulations
- Respond to injuries, and perform water rescues by administering First Aid, CPR, and rescue breathing if needed and adhering to District guidelines, policies & procedures
- Will assist in minor maintenance of recreational facilities to include setting up/breaking down equipment in addition to cleaning and stocking facilities
- Perform cash handling duties using basic mathematical calculations with speed and accuracy, receive payment, count money and make change, and prepare District reports
- ~~Perform water rescues and provide CPR, first aid and rescue breathing as needed~~
- ~~Instruct and/or assist with instruction of swimming lessons of all ages and abilities by following a structured lesson plan~~
- ~~Perform accurate cash register operations and ability to count money using addition and subtraction~~
- ~~Ability to communicate effectively with co-workers and customers in person and over the phone~~
- ~~Perform set up and breakdown of facility equipment as needed~~
- ~~Assume a professional attitude and appearance at all times while on duty~~
- ~~Considerately and patiently enforce facility rules to provide a safe environment and maintain order in swimming areas~~
- ~~Perform daily cleaning of pool, deck, locker rooms, restrooms, lobby and other areas as assigned~~
- ~~Perform other duties as assigned~~

Education/Experience: A valid work permit is required if you have not graduated high school or received a GED at time of hire.

- ~~Lifeguard: must be at least 16 years old with valid American Red Cross certifications as listed below.~~
- ~~Water Safety Instructor (WSI): must be at least 16 years old with both Lifeguard and Water Safety Instructor certification; six (6) months experience teaching swim lessons. While performing the duties of a WSI, employees will earn a 10% differential above their regular rate of lifeguard pay. WSI's hired prior to January 1, 2019, will remain at their current rate of pay and not be eligible for this differential.~~

CERTIFICATIONS, LICENSES, REGISTRATIONS: Required American Red Cross certifications (before start of employment): Lifeguarding, Standard First Aid, CPR for the Professional Rescuer and AED. In addition to the required certifications, the American Red Cross WSI (Water Safety Instructor Certification) is preferred for Lifeguards and **required** for Water Safety Instructors. This position requires less than average amount of driving for those over 18 years of age and therefore must have daily access to a vehicle and possess a valid California Driver's License and maintain appropriate insurance on vehicles used in the course of business duties. Position may involve driving to events as a representative of the District. The successful candidate must pass a Department of Justice Live Fingerprint Scan, Background/Reference Check, Screenings for Alcohol, Drug and Tuberculosis prior to the start of employment.



Pleasant Valley Recreation and Park District Job Description

EDUCATION and/or EXPERIENCE: A valid work permit is required if you have not graduated high school or received a GED at time of hire.

- Lifeguard: must be at least 15.5 years old with valid American Red Cross certifications as listed above.
- Water Safety Instructor (WSI): must be at least 16 years old with both Lifeguard and Water Safety Instructor certification; six (6) months experience teaching swim lessons. While performing the duties of a WSI, employees will earn a 10% differential above their regular rate of lifeguard pay.

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PHYSICAL DEMANDS: Swimming sufficient to perform lifesaving techniques and rescues; travels across wet, sloping surfaces; vision and hearing sufficient to and communicate across a noisy public swimming pool; speaking sufficient to exchange information in person, on the telephone, or at formal presentations; dexterity of hands and fingers to operate pool equipment; bending, stooping, reaching, kneeling, or crouching; sitting or standing for extended periods of time; and lifts, pushes and pulls 50 pounds when responding to emergency lifesaving situations. The employee must frequently lift and/or move up to 10 pounds, frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 75 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.—Hazards: Chemicals associated with a swimming pool; contact with blood, other body fluids, and communicable diseases; and slippery, uneven surfaces.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Works inside and outside in seasonal climate and weather conditions; works on slippery surfaces, where water and swimming pool chemicals are frequently encountered; may drive a vehicle to different locations; works irregular schedules including evenings, weekends, and holidays; and subject to emergency situations.

Job Title: Recreation Leader & Senior Leader
Department: Recreation
Reports To: Recreation Supervisor or as assigned
FLSA Status: Non-Exempt

Prepared Date: June 2022
Approved By: Board of Directors
Approved Date: July 6, 2022

SUMMARY: Under general supervision, assist with recreation programs and activities to provide opportunities and encourage and promote a healthy lifestyle for community residents, based on District rules, regulations, policies and procedures. May work with any aspect of recreation programs and/or work in any assigned division or department.

ESSENTIAL DUTIES AND RESPONSIBILITIES: A focus of quality customer service being primary for all positions. Performs other duties as assigned. Position will require some holiday, evening and/or weekend work assignments. Recreation Leader and Senior Recreation requires the following:

- May open, close, secure, and maintain a safe program environment and facility that align with District rules and regulations
- Develop, conduct, promote, supervise, and participate in various athletic, craft, social, cultural, and instructional activities to include use of equipment, and District reports
- Respond to public inquiries made by telephone, correspondence, or during public meetings about assigned programs while maintaining a professional attitude and appearance
- Respond to injuries, by administering First Aid and CPR if needed and adhering to District guidelines, policies & procedures
- Demonstrate continuous effort to improve operations, streamline work processes
- Perform cash handling duties using basic mathematical calculations with speed and accuracy, receive payment, count money and make change, and prepare District reports
- Will assist in minor maintenance of recreational facilities to include setting up/breaking down equipment and cleaning, stocking facilities
- May assist with marketing, presentations, and District public appearances

SENIOR LEADER:

- May act as the Camp or Assistant Camp Director for the District's summer camp program or may act as Lead for the Excursion Program
- Assist with staff schedules
- Provide input on yearly performance reviews
- Will serve in a lead capacity for other Recreation Leaders

QUALIFICATIONS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Working knowledge of: common office practices; basic office equipment and software.
- Must possess excellent oral and written communication skills. Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals. Ability to write routine reports and correspondence. Ability to speak before groups of customers or employees of organization.

CERTIFICATES, LICENSES, REGISTRATIONS: Some positions require an average amount of driving, therefore, if assigned to such positions, the employee must own a vehicle or have daily access to a vehicle, and possess a valid California Driver's License, and maintain appropriate insurance on vehicle used in the course of business duties. CPR and First Aid Certification required within first six (6) months of hire date. At the option of the Department Manager or Recreation Supervisor, persons hired into this position may be required to either possess at entry or obtain within specified time limits designated licenses, certificates, or specialized education

and training relevant to the area of assignment. Successful completion of tuberculosis screening and criminal justice fingerprint clearance/background check required.

EDUCATION and/or EXPERIENCE:

- Recreation Leader: Must possess a valid work permit and have completed one year of High School. Volunteer or paid work experience with youth/teens/seniors is desirable.
- Senior Leader: thirty (30) units of applicable college course work, and two (2) years recreation or volunteer related experience preferred.

Or, an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to stand; sit; twist, and use hands to finger, handle, or feel. The employee is frequently required to walk; reach with hands and arms; climb or balance; stoop, kneel, crouch, or crawl; and talk or hear for extended periods of time. The employee must frequently lift and/or move up to 10 pounds, frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 75 pounds.

Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is occasionally exposed to risk of electrical shock. The noise level in the work environment is usually loud.



Pleasant Valley Recreation and Park District Job Description

Job Title: Recreation Leader & Senior Leader
Department: Recreation
Reports To: Recreation Supervisor or as assigned
FLSA Status: ~~Non-Exempt~~

FLSA Status: ~~Non-Exempt~~
Prepared Date: June 2019
Approved By:
Approved Date:

SUMMARY: Under general supervision, assist with recreation programs and activities ~~in order to~~ provide opportunities and encourage and promote a healthy lifestyle for community residents ~~based on District rules, regulations, policies and procedures.~~ May work with any aspect of recreation programs and/or work in any assigned division or department; ~~Administration, Parks, Recreation — aquatics, classes, senior services and youth and adult sports, marketing, community outreach and special events. Conducts, instructs and monitors recreational program activities within one or more assigned program areas, based on District rules, regulations, policies and procedures.~~

ESSENTIAL DUTIES AND RESPONSIBILITIES: A focus of ~~Q~~uality ~~c~~ustomer ~~s~~ervice being primary for all positions. Performs other duties as assigned. ~~Position will require some holiday, evening and/or weekend work assignments.~~ Recreation Leader and Senior Recreation requires the following:

- ~~• Opens, closes, secures and maintains a safe program environment and facility; conducts safety checks as required.~~
- ~~• Administers First Aid and CPR as needed.~~
- ~~• Show respect and sensitivity for cultural differences; promotes a harassment-free environment; builds a diverse workforce.~~
- ~~• Ensure that appropriate image and approach and respect are being consistently exercised.~~
- ~~• Demonstrate continuous effort to improve operations, decrease turnaround times, streamline work processes, and work cooperatively and jointly to provide quality seamless customer service.~~
- ~~• Set up and take down program equipment as required (i.e., cones, mats and bases on fields, balls, chairs, tables, scorecards, sign-in sheets, set up concession stand(s), remove and place program or event signage as appropriate, open and close applicable rooms) and prepare venue for activities and events; supervise and coach participants; maintain equipment and facilities in clean and safe condition; communicate with general public, community resource agencies, and other organizations in order to coordinate and promote program activities.~~
- ~~• Instruct various arts, crafts, games, classes, and sports; explain the rules and techniques for specific activities; evaluate performance of program participants and assist with skills improvement.~~
- ~~• Assist in the development and promotion of recreation programs, including but not limited to music, dance, arts and crafts, cultural arts, nature study, swimming, social recreation, youth and adult sports, and games.~~
- ~~• Maintain order during activities and enforce District rules and regulations (i.e., wearing required safety equipment).~~
- ~~• Issue and receive recreation equipment specific to the program or event (i.e., skate board elbow and kneepads, balls, scorecards, sign-in sheets, remove, and place program or event signage as appropriate).~~
- ~~• Walk distances of a few feet to several hundred yards to observe the field, program or event and participants frequently during the program.~~
- ~~• Prepare score sheets, statistics, and written reports; maintain records and reports for accidents, incidents, emergency, attendance, activity, registration, web site updates and reservations; perform program surveys and evaluations.~~
- ~~• Respond to public inquiries made by telephone, correspondence, or during public meetings about assigned programs.~~
- ~~• Perform cash handling duties using basic mathematical calculations with speed and accuracy, receive payment, count money and make change, and prepare the cash report for the day, shift, or event.~~
- ~~• Assist with surveying and educating the community on recreation programs.~~
- ~~• May assist in minor maintenance of recreational facilities and equipment including cleaning and stocking facilities, set up and clean up.~~



Pleasant Valley Recreation and Park District Job Description

- ~~May require some Holiday, evening, and/or weekend work assignments.~~
- ~~May assist in designing print ads, flyers, and banners for marketing and information purposes.~~

- ~~Assists in researching, writing and distributing press releases to targeted media.~~
- ~~Assists with the format, layout and customization of documents and presentations.~~
- ~~Create visual aspects of marketing materials, websites and other media, including infographics.~~
- ~~May open, close, secure, and maintain a safe program environment and facility that align with District rules and regulations~~
- ~~Develop, conduct, promote, supervise, and participate in various athletic, craft, social, cultural, and instructional activities to include use of equipment, and District reports~~
- ~~Respond to public inquiries made by telephone, correspondence, or during public meetings about assigned programs while maintaining a professional attitude and appearance~~
- ~~Respond to injuries, by administering First Aid and CPR if needed and adhering to District guidelines, policies & procedures~~
- ~~Demonstrate continuous effort to improve operations, streamline work processes~~
- ~~Perform cash handling duties using basic mathematical calculations with speed and accuracy, receive payment, count money and make change, and prepare District reports~~
- ~~Will assist in minor maintenance of recreational facilities to include setting up/breaking down equipment and cleaning, stocking facilities~~
- ~~May assist with marketing, presentations, and District public appearances~~

SENIOR LEADER:

- May act as the Camp or Assistant Camp Director for the District's summer camp program or may act as Lead for the Excursion Program.
- ~~Will be able to fill in for the Senior Leader II as needed.~~
- Assist ~~Recreation Coordinator~~ with staff schedules.
- Provide input on yearly performance reviews.
- Will serve in a lead capacity for other Recreation Leaders.
- ~~May help with specific programs.~~

QUALIFICATIONS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- ~~Working knowledge of: common office practices; basic office equipment and software.~~
- ~~Must possess excellent oral and written communication skills. Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals. Ability to write routine reports and correspondence. Ability to speak before groups of customers or employees of organization.~~

CERTIFICATES, LICENSES, REGISTRATIONS: Some positions require an average amount of driving, therefore, if assigned to such positions, the employee must own a vehicle or have daily access to a vehicle, and possess a valid California Driver's License, and maintain appropriate insurance on vehicle used in the course of business duties. ~~Position may involve driving to events as a representative of the District.~~ CPR and First Aid Certification required within first six (6) months of hire date. At the option of the Department Manager or Recreation Supervisor, persons hired into this position may be required to either possess at entry or obtain within specified time limits designated licenses, ~~certificates~~certificates, or specialized education



Pleasant Valley Recreation and Park District Job Description

and training relevant to the area of assignment. Successful completion of tuberculosis screening and criminal justice fingerprint clearance/background check required.

EDUCATION and/or EXPERIENCE:

- Recreation Leader: Must possess a valid work permit and have completed two-one years of High School. Volunteer or paid work experience with youth/teens/seniors is desirable. -
- Senior Leader: thirty (30) units of applicable college course work, and; two (2) years recreation or volunteer related experience.

Or, an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job.

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PHYSICAL DEMANDS: -The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to stand; sit; twist, and use hands to finger, handle, or feel. The employee is frequently required to walk; reach with hands and arms; climb or balance; stoop, kneel, crouch, or crawl; and talk or hear for extended periods of time. The employee must frequently lift and/or move up to 10 pounds, frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 75 pounds.

Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this

job, the employee is occasionally exposed to risk of electrical shock. The noise level in the work environment is usually loud.

Job Title:	Recreation Coordinator	Category:	Staff
Department:	Recreation	Prepared Date:	July 2022
Reports To:	Recreation Supervisor or as assigned	Approved By:	Board of Directors
FLSA Status:	Non-Exempt	Approved Date:	July 6, 2022

SUMMARY: To supervise, assign and review the work of staff responsible for various programs; to oversee and participate in all work activities; and to perform a variety of technical tasks relative to assigned area of responsibility.

ESSENTIAL DUTIES AND RESPONSIBILITIES: Includes the following, with a focus of quality customer service being primary for all positions. Position will require some holiday, evening and/or weekend work assignments. Performs related duties as assigned.

- Directly supervise and manage full-time, part-time employees, contracted instructors, and volunteers. To include onboarding, training, scheduling, professional development, H.R related items while adhering to District guidelines, policies, and procedures
- Develop, conduct, promote, supervise, manage, and participate in various activities, programs, events, and rentals to include use of equipment, facility management and programming, while maintaining records, preparing evaluation reports on programs and maintain district reports
- Will provide support with marketing/programming material for recreational programs to include public relations, print materials, and digital media
- Will open, close, secure, setup/break-down and maintain a safe program environment and facilities that align with District rules and regulations
- Respond to public and internal inquiries made by telephone, correspondence, or during public meetings about activities, programs, and events while maintaining a professional attitude and appearance
- Evaluate programs and facilities to ensure optimum utilization and service to community to ensure recreation programs meet the needs of the community of all ages and abilities, while implementing market driven initiatives
- Demonstrate continuous effort to improve operations, streamline work processes within the District and outside organizations
- Present to the Board of Directors on activities, events, and programs and provide input, data, and support to the Recreation Supervisor for Staff Reports
- Perform cash handling duties using basic mathematical calculations with speed and accuracy, receive payment, count money and make change, and prepare District reports
- Respond to injuries by administering First Aid, CPR, and rescue breathing if needed and adhering to District guidelines, policies & procedures
- Maintain communications and effective working relationships with co-workers, supervisors, other governmental agencies non-profit organizations, civic groups, elected and appointed officials, community groups and the public-at-large
- Participate in the preparation and administration of the recreation division budget: submit budget recommendations; monitor expenditures
- Attend and participate in professional group meetings/training staying abreast of new trends and innovations in the field of recreation and parks.

QUALIFICATIONS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Thorough to comprehensive knowledge of: operations, services and activities of parks and recreation programs; principles and practices of recreation program development and administration; marketing theories, principles and practices as related to recreation services; principles of budget preparation and control; procurement practices; principles of supervision, training, and performance evaluation.

- Thorough to comprehensive ability to: read, analyze, and interpret documents in area of expertise, technical procedures, or government regulations; write reports, correspondence and procedure manuals; communicate effectively in written and oral form; present information and respond to questions.

EDUCATION and/or EXPERIENCE: Recommended Bachelor's Degree with emphasis in Recreation or a closely related field; two years (2) in public group recreational activity leadership experience including supervisory, public relations, marketing skills. Knowledge of principles and techniques pertaining to the specialized program activities and program marketing and evaluation methods; or an equivalent combination of education and experience.

CERTIFICATES, LICENSES, REGISTRATIONS: Position requires average amount of driving, therefore, must have daily access to a vehicle, and possess a valid California driver's license, and maintain appropriate insurance on vehicle used in the course of business duties. Position may involve driving to events as a representative of the District. CPR and First Aid Certification required no later than six (6) months after employment. Successful completion of tuberculosis, drug and alcohol screening and criminal justice fingerprint clearance/background check required.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to stand; sit; twist, and use hands to finger, handle, or feel. The employee is frequently required to walk; reach with hands and arms; climb or balance; stoop, kneel, crouch, or crawl; and talk or hear. The employee must frequently lift and/or move up to 10 pounds, frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 75 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is occasionally exposed to risk of electrical shock. The noise level in the work environment is usually loud.



Pleasant Valley Recreation and Park District Job Description

Job Title: Recreation Coordinator
Department: Recreation
Reports To: General Manager Recreation
Supervisor or as assigned
FLSA Status: Non-Exempt

Category: Staff
Prepared Date: April 2015
Approved By: Board of Directors
Approved Date: July 1, 2015

SUMMARY: To supervise, assign and review the work of staff responsible for various programs; to oversee and participate in all work activities; and to perform a variety of technical tasks relative to assigned area of responsibility.

ESSENTIAL DUTIES AND RESPONSIBILITIES: Includes the following, with a focus of Quality Customer Service being primary for all positions. Position will require some holiday, evening and/or weekend work assignments. Performs related duties as assigned.

- Directly supervise and manage full-time, part-time employees, contracted instructors, and volunteers. To include onboarding, training, scheduling, professional development, H.R related items while adhering to District guidelines, policies, and procedures
- Develop, conduct, promote, supervise, manage, and participate in various activities, programs, events, and rentals to include use of equipment, facility management and programming, while maintaining records, preparing evaluation reports on programs and maintain district reports
- Will provide support with marketing/programming material for recreational programs to include public relations, print materials, and digital media
- Will open, close, secure, setup/break-down and maintain a safe program environment and facilities that align with District rules and regulations
- Respond to public and internal inquiries made by telephone, correspondence, or during public meetings about activities, programs, and events while maintaining a professional attitude and appearance
- Evaluate programs and facilities to ensure optimum utilization and service to community to ensure recreation programs meet the needs of the community of all ages and abilities, while implementing market driven initiatives
- Demonstrate continuous effort to improve operations, streamline work processes within the District and outside organizations
- Present to the Board of Directors on activities, events, and programs and provide input, data, and support to the Recreation Supervisor for Staff Reports
- Perform cash handling duties using basic mathematical calculations with speed and accuracy, receive payment, count money and make change, and prepare District reports
- Respond to injuries by administering First Aid, CPR, and rescue breathing if needed and adhering to District guidelines, policies & procedures
- Maintain communications and effective working relationships with co-workers, supervisors, other governmental agencies non-profit organizations, civic groups, elected and appointed officials, community groups and the public-at-large
- Participate in the preparation and administration of the recreation division budget: submit budget recommendations; monitor expenditures
- Attend and participate in professional group meetings/training staying abreast of new trends and innovations in the field of recreation and parks.
- ~~Implement and maintain ongoing training programs to enhance individual development in service, program knowledge, interpersonal and technical skills.~~
- ~~Direct, coordinate and review the work plan for assigned programs; meet with staff to identify and resolve problems; assign work activities and projects; monitor work flow; review work products, methods and procedures; assist other staff in a variety of special events or special projects.~~
- ~~Participate in the selection of program staff and volunteers; provide or coordinate staff training; work with employees to correct deficiencies; implement discipline procedures.~~



Pleasant Valley Recreation and Park District Job Description

- ~~Plan, prioritize, assign, supervise and review the work of assigned staff responsible for providing recreation programs; provide responsible staff assistance to the division supervisor; prepare and present staff reports and other necessary correspondence.~~
- ~~Initiate, direct, coordinate and supervise a variety of recreational programs and activities.~~
- ~~Procure equipment and supplies as required for assigned program; coordinate with management and other public and private agencies in procuring materials and equipment for program use.~~
- ~~Recommend and assist in the implementation of goals and objectives; implement approved policies and procedures.~~
- ~~Serve as an information resource to other divisions, departments outside agencies, and the general public.~~
- ~~Identify opportunities for improving service delivery methods and procedures; review with appropriate management staff; implement improvements.~~
- ~~Serve as liaison between Pleasant Valley Recreation and Park District and Community Service Groups; negotiate and resolve significant and controversial issues.~~
- ~~Plan and coordinate marketing efforts; make presentations to professional groups, and social and community organizations; assist in design of brochures, flyers, bulletin boards and other publicity releases; attend and participate in professional group meetings; stay abreast of new trends and innovations in the field of recreation and parks.~~
- ~~Participate in the preparation and administration of the recreation division budget; submit budget recommendations; monitor expenditures.~~
- ~~Maintain records and prepare evaluation reports on new or ongoing programs; document the number of registrations and fees collected; maintain and file accident reports; prepare statistical reports as required.~~
- ~~Coordinate various recreation programs; develop event schedules and supply appropriate staffing levels; attend scheduled events and assess program fulfillment of community needs.~~
- ~~Plan, organize and supervise a variety of age specific recreation activities and special events; solicit sponsorships for various special events; follow up with potential supporters as appropriate.~~
- ~~Coordinate co-sponsorships with commercial businesses and non-profit agencies to provide financial support in offering a wide variety of special events.~~
- ~~Assist with surveying and educating the community on recreation programs.~~
- ~~May require some Holiday, evening, and/or weekend work assignments.~~

QUALIFICATIONS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Thorough to comprehensive knowledge of: operations, services and activities of parks and recreation programs; principles and practices of recreation program development and administration; marketing theories, principles and practices as related to recreation services; principles of budget preparation and control; procurement practices; principles of supervision, training, and performance evaluation.
- Thorough to comprehensive ability to: read, analyze, and interpret documents in area of expertise, technical procedures, or government regulations; write reports, correspondence and procedure manuals; communicate effectively in written and oral form; present information and respond to questions.

EDUCATION and/or EXPERIENCE: Recommended Bachelor's Degree with emphasis in Recreation or a closely related field; two years (2) in public group recreational activity leadership experience including supervisory, public relations, marketing skills. Knowledge of principles and techniques pertaining to the specialized program activities and program marketing and evaluation methods; or an equivalent combination of education and experience.



Pleasant Valley Recreation and Park District Job Description

CERTIFICATES, LICENSES, REGISTRATIONS: Position requires average amount of driving, therefore, must have daily access to a vehicle, and possess a valid California driver's license, and maintain appropriate insurance on vehicle used in the course of business duties. Position may involve driving to events as a representative of the District. CPR and First Aid Certification required no later than six (6) months after employment. Successful completion of tuberculosis, drug and alcohol screening and criminal justice fingerprint clearance/background check required.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to stand; sit; twist, and use hands to finger, handle, or feel. The employee is frequently required to walk; reach with hands and arms; climb or balance; stoop, kneel, crouch, or crawl; and talk or hear. The employee must frequently lift and/or move up to 10 pounds, frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 75 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is occasionally exposed to risk of electrical shock. The noise level in the work environment is usually loud.

Job Title: Recreation Services Manager
Department: Recreation
Reports To: General Manager
FLSA Status: Exempt

Category: Management
Prepared Date: June 2022
Approved by: Board of Directors
Approved Date: July 6, 2022

SUMMARY: Supervise the delivery of all recreation programs, services and activities for the District. Responsibilities entail accountability based on measurable cost effective results for the substance, efficiency, productivity, and quality of activities performed by the Recreation Department and assigned management, supervisory and support staff. Responsible for department contract administration. Provide written and oral reports to the General Manager and the Board of Directors.

ESSENTIAL DUTIES AND RESPONSIBILITIES: Includes the following, with a focus of Quality Customer Service being primary for all positions. Will require some holiday, evening, and/or weekend work assignments. Performs additional duties as assigned.

- Supervises the administrative functions of the recreation department
- Oversee department management staff with development of department's preliminary budgets, monitor and administer the final department budgets; recommend program fees and expenditures; monitor and track expenditures
- Attend all board meetings; prepare and present staff reports and other necessary correspondence.
- Supervise the use/scheduling of District recreational facilities
- Maintain communications, advocate, and establish effective working relationships with co-workers, supervisors, other governmental agencies non-profit organizations, civic groups, elected and appointed officials, community groups and the public-at-large
- Respond to injuries by administering First Aid, CPR, and rescue breathing if needed and adhering to District guidelines, policies, and procedures
- Represent the department/District on various boards, committees and within community, government, and civic organizations
- Respond to public and internal inquiries made by telephone, correspondence, or during public meetings about activities, programs, and events while maintaining a professional attitude and appearance
- Oversee marketing/programming material for recreational programs to include public relations, print materials, and digital media
- Directly supervise and manage employees and volunteers. To include onboarding, training, scheduling, professional development, H.R related items while adhering to District guidelines, policies & procedures
- Oversee and review department activities, projects, programs, and staffing while evaluate work products, methods, and procedures, conduct special projects including capital improvement planning and the development of new recreational facilities
- Evaluate programs and facilities to ensure optimum utilization and service to community to ensure recreation programs meet the needs of the community of all ages and abilities, while implementing market driven initiatives
- Develop, oversee, and recommend the implementation of department short and long-term goals, strategies, and objectives to keep pace with community demands and needs
- Meet with civic organizations and individuals to promote programs and obtain input regarding service delivery and community needs
- Attend and participate in professional group meetings; stay abreast of new trends and innovations in the field of recreation and parks

QUALIFICATIONS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Thorough to comprehensive knowledge of: common office practices; current recreation trends; principles of supervision, employee motivation, training and performance evaluation.
- Working knowledge of: social and advocacy programs, services, and activities within the recreation field; laws and regulations governing recreation programs.
- Ability to read, analyze and interpret periodicals related to area of expertise, technical procedures, or government regulations. Ability to write reports, correspondence, procedure manuals or articles. Ability to effectively communicate, present information in oral and written form, and respond to questions from managers and the general public; interpret and explain pertinent District policies and procedures.
- Ability to: assist in the development and monitoring of an assigned program budget; develop and recommend policies and procedures related to assigned operations; coordinate, organize, implement, and publicize recreation and leisure time activities and specialized events.
- Knowledge and experience with materials, methods, practices, and equipment in relation to recreation programs.
- Knowledge and principles of supervision, employee motivation, training and performance evaluation.

EDUCATION and/or EXPERIENCE: Bachelor's Degree in recreation, physical education, leisure studies, sociology, gerontology, communications, health care profession, or related field with minimum of four (4) years of progressive experience in recreation, including a minimum five (5) years of comprehensive recreation programming experience at a level equivalent to recreation supervisor, including four (4) years of supervisory and administrative responsibility, or equivalent combination of education and experience. Working knowledge of related social and advocacy programs, services, and activities within the recreation field. May require specialized knowledge within department assigned, including laws/regulations governing recreation programs. Certification as Parks and Recreation Professional is desirable.

CERTIFICATES, LICENSES, REGISTRATIONS: Position requires average amount of driving, therefore, must have daily access to a vehicle, and possess a valid Driver's License with a clean California Department Motor Vehicle record, and maintain appropriate insurance on vehicle used in the course of business duties. Position may involve driving to events as a representative of the District. CPR and First Aid Certification required no later than six (6) months after employment.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to stand; sit; twist, and use hands to finger, handle, or feel. The employee is frequently required to walk; reach with hands and arms; climb or balance; stoop, kneel, crouch, or crawl; and talk or hear. The employee must frequently lift and/or move up to 10 pounds, frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 75 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is occasionally exposed to risk of electrical shock. The noise level in the work environment is usually loud.



Pleasant Valley Recreation and Park District Job Description

Job Title: Recreation Services Manager
Department: Recreation
Reports To: General Manager
FLSA Status: Exempt

Category: Management
Prepared Date: April 2015
Approved by: Board of Directors
Approved Date: July 1, 2015

SUMMARY: Supervise the delivery of all recreation programs, services and activities for the District. Responsibilities entail accountability based on measurable cost effective results for the substance, efficiency, productivity, and quality of activities performed by the Recreation Department and assigned management, supervisory and support staff. Responsible for department contract administration. Provide written and oral reports to the General Manager and the Board of Directors.

ESSENTIAL DUTIES AND RESPONSIBILITIES: Includes the following, with a focus of Quality Customer Service being primary for all positions. Will require some holiday, evening, and/or weekend work assignments. Performs additional duties as assigned.

- Supervises the administrative functions of the recreation department
- Oversee department management staff with development of department's preliminary budgets, monitor and administer the final department budgets; recommend program fees and expenditures; monitor and track expenditures
- Attend all board meetings; prepare and present staff reports and other necessary correspondence.
- Supervise the use/scheduling of District recreational facilities
- Maintain communications, advocate, and establish effective working relationships with co-workers, supervisors, other governmental agencies non-profit organizations, civic groups, elected and appointed officials, community groups and the public-at-large
- Respond to injuries by administering First Aid, CPR, and rescue breathing if needed and adhering to District guidelines, policies, and procedures
- Represent the department/District on various boards, committees and within community, government, and civic organizations
- Respond to public and internal inquiries made by telephone, correspondence, or during public meetings about activities, programs, and events while maintaining a professional attitude and appearance
- Oversee marketing/programming material for recreational programs to include public relations, print materials, and digital media
- Directly supervise and manage employees and volunteers. To include onboarding, training, scheduling, professional development, H.R related items while adhering to District guidelines, policies & procedures
- Oversee and review department activities, projects, programs, and staffing while evaluate work products, methods, and procedures, conduct special projects including capital improvement planning and the development of new recreational facilities
- Evaluate programs and facilities to ensure optimum utilization and service to community to ensure recreation programs meet the needs of the community of all ages and abilities, while implementing market driven initiatives
- Develop, oversee, and recommend the implementation of department short and long-term goals, strategies, and objectives to keep pace with community demands and needs
- Meet with civic organizations and individuals to promote programs and obtain input regarding service delivery and community needs
- Attend and participate in professional group meetings; stay abreast of new trends and innovations in the field of recreation and parks
- Establish and maintain an open and effective system of communication throughout the organization.
- Supervises the administrative functions of the recreation department.



Pleasant Valley Recreation and Park District Job Description

- ~~Oversee department management staff with development of department's preliminary budgets, monitor and administer the final department budgets; recommend program fees and expenditures; monitor and track expenditures.~~
 - ~~Oversee and review department activities, projects, and programs, evaluate work products, methods, and procedures; conduct special projects including capital improvement planning and the development of new recreational facilities.~~
 - ~~Oversee and recommend the implementation of department goals and objectives; establish schedules and methods for providing general recreation, aquatics, senior citizen programs; and sports; implement policies and procedures.~~
 - ~~Plan and direct publicity for recreation programs and special events; represent the department on various boards and committees; oversee scheduling of a variety of District operated facilities; oversee/coordinate the operation of the recreation department with assigned recreation support staff.~~
 - ~~Oversee and monitor work of recreation staff, and individual program instructors; provide information and guidance on budgetary limits and resources.~~
 - ~~Advocate and work closely with citizens and other service providers in a cooperative community response to program needs including but not limited to non-profit organizations, civic groups, and other governmental agencies.~~
 - ~~Oversee/prepare calendar of events, including newsletters, public relations announcements, and other similar communications.~~
 - ~~Evaluate programs and facilities to ensure optimum utilization and service to community. Adapt recreation programs to meet the needs of the District's clientele of all ages and abilities.~~
 - ~~Develop and implement short and long-term Recreation strategies and goals to keep pace with community demands and needs.~~
 - ~~Supervise the use of District recreational facilities and various associated programs.~~
 - ~~Oversee programs and special events, and coordinate with other departments, local agencies, and groups.~~
 - ~~Develop and implement market driven initiatives, which will enhance service delivery.~~
 - ~~Respond to inquiries and suggestions regarding programs and facilities.~~
 - ~~Attend board meetings; prepare and present staff reports and other necessary correspondence.~~
 - ~~Meet with civic organizations and individuals to promote programs and obtain input regarding service delivery and community needs.~~
 - ~~Maintain communications and effective working relationships with co-workers, supervisors, other governmental agencies, elected and appointed officials, community groups and the public-at-large.~~
-
- ~~Attend and participate in professional group meetings; stay abreast of new trends and innovations in the field of recreation.~~
 - ~~Hire new employees, train or assign training, address employee complaints, and resolve personnel issues, plan and assign employee responsibilities and schedules.~~
 - ~~May require some Holiday, evening, and/or weekend work assignments.~~

Commented [KS1]: Stated in other bullet points

Commented [KS2]: Stated in other bullet points

QUALIFICATIONS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- > Thorough to comprehensive knowledge of: common office practices; current recreation trends; principles of supervision, employee motivation, training and performance evaluation.
- > Working knowledge of: social and advocacy programs, services, and activities within the recreation field; laws and regulations governing recreation programs.



Pleasant Valley Recreation and Park District Job Description

- Ability to read, analyze and interpret periodicals related to area of expertise, technical procedures, or government regulations. Ability to write reports, correspondence, procedure manuals or articles. Ability to effectively communicate, present information in oral and written form, and respond to questions from managers and the general public; interpret and explain pertinent District policies and procedures.
- Ability to: assist in the development and monitoring of an assigned program budget; develop and recommend policies and procedures related to assigned operations; coordinate, organize, implement, and publicize recreation and leisure time activities and specialized events.
- Knowledge and experience with materials, methods, practices, and equipment in relation to recreation programs.
- Knowledge and principles of supervision, employee motivation, training and performance evaluation.

EDUCATION and/or EXPERIENCE: Bachelor's Degree in recreation, physical education, leisure studies, sociology, gerontology, communications, health care profession, or related field with minimum of four (4) years of progressive experience in recreation, including a minimum five (5) years of comprehensive recreation programming experience at a level equivalent to recreation supervisor, including four (4) years of supervisory and administrative responsibility, or equivalent combination of education and experience. Working knowledge of related social and advocacy programs, services, and activities within the recreation field. May require specialized knowledge within department assigned, including laws/regulations governing recreation programs. Certification as Parks and Recreation Professional is desirable.

CERTIFICATES, LICENSES, REGISTRATIONS: Position requires average amount of driving, therefore, must have daily access to a vehicle, and possess a valid Driver's License with a clean California Department Motor Vehicle record, and maintain appropriate insurance on vehicle used in the course of business duties. Position may involve driving to events as a representative of the District. CPR and First Aid Certification required no later than six (6) months after employment.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to stand; sit; twist, and use hands to finger, handle, or feel. The employee is frequently required to walk; reach with hands and arms; climb or balance; stoop, kneel, crouch, or crawl; and talk or hear. The employee must frequently lift and/or move up to 10 pounds, frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 75 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may

be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is occasionally exposed to risk of electrical shock. The noise level in the work environment is usually loud.

Job Title:	Recreation Specialist	Category:	Staff
Department:	Recreation	Prepared Date:	June 2022
Reports To:	Recreation Coordinator or as assigned	Approved by:	Board of Directors
FLSA Status:	Non-Exempt	Approved Date:	July 6, 2022

SUMMARY: Under general supervision, conducts programs and coordinates activities of paid and volunteer Recreation Division personnel at assigned parks and facilities.

ESSENTIAL DUTIES AND RESPONSIBILITIES: Includes the following, with a focus of quality customer service being primary for all positions. Position will require some holiday, evening and/or weekend work assignments. Performs other duties as assigned.

- Directly supervise and manage, part-time employees, contracted instructors, and volunteers. To include onboarding, training, scheduling, initial review of timecards, H.R related items while adhering to District guidelines, policies, and procedures
- Develop, conduct, promote, supervise, manage, and participate in various activities, programs, events, and rentals to include use of equipment, facility management and programming, while maintaining records, preparing evaluation reports on programs and maintain district reports
- Will provide support with marketing/programming material for recreational programs to include public relations, print materials, and digital media
- Will open, close, secure, setup/break-down and maintain a safe program environment and facilities that align with District rules and regulations
- Respond to public and internal inquiries made by telephone, correspondence, or during public meetings about activities, programs, and events while maintaining a professional attitude and appearance
- Evaluate programs and facilities to ensure optimum utilization and service to community to ensure recreation programs meet the needs of the community of all ages and abilities, while implementing market driven initiatives
- Demonstrate continuous effort to improve operations, streamline work processes within the District and outside organizations
- Present to the Board of Directors on specific activities, events, and programs and provide input and data on projects to the Recreation Supervisor for Staff Reports
- Perform cash handling duties using basic mathematical calculations with speed and accuracy, receive payment, count money and make change, and prepare District reports
- Respond to injuries by administering First Aid, CPR, and rescue breathing if needed and adhering to District guidelines, policies & procedures
- Maintain communications and effective working relationships with co-workers, supervisors, other governmental agencies non-profit organizations, civic groups, elected and appointed officials, community groups and the public-at-large
- Under supervision assures that areas of responsibility are within the budget; performs cost control activities; monitors revenues and expenditures to assure sound fiscal control; provides information and data for the preparation of budget
- Attend and participate in professional group meetings/training staying abreast of new trends and innovations in the field of recreation and parks.

QUALIFICATIONS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Thorough to comprehensive knowledge of: operations, services and activities of parks and recreation programs; principles and practices of recreation program development and administration; marketing theories, principles and practices as related to recreation services; principles of budget preparation and control; procurement practices; principles of supervision, training, and performance evaluation.

- Thorough to comprehensive ability to: read, analyze, and interpret documents in area of expertise, technical procedures, or government regulations; write reports, correspondence and procedure manuals; communicate effectively in written and oral form; present information and respond to questions.

EDUCATION and/or EXPERIENCE: Recommended Associates degree with major course work in applicable field; and two years of experience working with recreation programs, including six months of lead or supervisory responsibility, or one year of paid experience in supervision of public recreation programs involving supervision of part-time recreation leaders, personnel, and volunteers (2,000 hours of part-time and/or internship experience is equivalent to one year of full-time experience), or equivalent combination of education and experience.

CERTIFICATES, LICENSES, REGISTRATIONS: Position requires average amount of driving, therefore, must have daily access to a vehicle, and possess a valid California driver's license and maintain appropriate insurance on vehicle used in the course of business duties. Position may involve driving to events as a representative of the District. CPR and First Aid Certification required no later than six (6) months after employment. Successful completion of tuberculosis, alcohol and drug screenings and criminal justice fingerprint clearance/background check required.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is frequently required to stand; sit; twist, and use hands to finger, handle, or feel. The employee is frequently required to walk; reach with hands and arms; climb or balance; stoop, kneel, crouch, or crawl; and talk or hear. The employee must frequently lift and/or move up to 10 pounds, frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 75 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is occasionally exposed to risk of electrical shock. The noise level in the work environment is usually loud. This position may require overtime and adjusted schedules for special events.



Pleasant Valley Recreation and Park District Job Description

Job Title: Recreation Specialist
Department: ~~Based on~~
Assignment: Recreation
Reports To: Recreation Coordinator or as assigned

FLSA Status: Non-Exempt
Category: Staff
Prepared Date: April 2015
Approved by: Board of Directors
Approved Date: July 1, 2015

SUMMARY: Under general supervision, conducts programs and coordinates activities of paid and volunteer Recreation Division personnel at assigned parks and facilities.

ESSENTIAL DUTIES AND RESPONSIBILITIES: Includes the following, with a focus of Quality Customer Service being primary for all positions. Position will require some holiday, evening and/or weekend work assignments. Performs other duties as assigned.

- Directly supervise and manage, part-time employees, contracted instructors, and volunteers. To include onboarding, training, scheduling, initial review of timecards, H.R related items while adhering to District guidelines, policies, and procedures
- Develop, conduct, promote, supervise, manage, and participate in various activities, programs, events, and rentals to include use of equipment, facility management and programming, while maintaining records, preparing evaluation reports on programs and maintain district reports
- Will provide support with marketing/programming material for recreational programs to include public relations, print materials, and digital media
- Will open, close, secure, setup/break-down and maintain a safe program environment and facilities that align with District rules and regulations
- Respond to public and internal inquiries made by telephone, correspondence, or during public meetings about activities, programs, and events while maintaining a professional attitude and appearance
- Evaluate programs and facilities to ensure optimum utilization and service to community to ensure recreation programs meet the needs of the community of all ages and abilities, while implementing market driven initiatives
- Demonstrate continuous effort to improve operations, streamline work processes within the District and outside organizations
- Present to the Board of Directors on specific activities, events, and programs and provide input and data on projects to the Recreation Supervisor for Staff Reports
- Perform cash handling duties using basic mathematical calculations with speed and accuracy, receive payment, count money and make change, and prepare District reports
- Respond to injuries by administering First Aid, CPR, and rescue breathing if needed and adhering to District guidelines, policies & procedures
- Maintain communications and effective working relationships with co-workers, supervisors, other governmental agencies non-profit organizations, civic groups, elected and appointed officials, community groups and the public-at-large
- Under supervision assures that areas of responsibility are within the budget; performs cost control activities; monitors revenues and expenditures to assure sound fiscal control; provides information and data for the preparation of budget
- Attend and participate in professional group meetings/training staying abreast of new trends and innovations in the field of recreation and parks.
- ~~Ability to, as assigned, coordinate and work with part-time staff, volunteers, the public and diverse populations.~~
- ~~Develop and conduct assigned programs and activities to achieve goals within available resources; trains, motivates and evaluates assigned part-time staff, reviews progress and recommends changes as needed.~~
- ~~Provide feedback to recreation management; makes presentation to supervisors, boards, civic groups and the general public.~~
- ~~Communicate official plans; policies and procedures to part-time staff and the general public.~~



Pleasant Valley Recreation and Park District Job Description

- ~~Under supervision assures that areas of responsibility are performed within the budget; performs cost control activities; monitors revenues and expenditures in assigned area to assure sound fiscal control; assures effective and efficient use of budgeted funds, personnel, materials, facilities, and time.~~
- ~~Determine work procedures, prepares work schedules for part-time staff, and expedites workflow; studies and standardizes procedures to improve efficiency and effectiveness of operations.~~
- ~~Assists in the development and promotion of recreation program including music, dance, arts and crafts, cultural arts, senior services, nature study, swimming, social recreation, special events and games.~~
- ~~Adapt recreation programs to meet needs of the public.~~
- ~~Introduce new program activities, equipment, and materials to customers.~~
- ~~Interpret recreation service to public and participates in community meetings and organizational planning.~~
- ~~Work in teams with administrative or other professional personnel to ensure that recreation is well balanced, coordinated, and integrated with special services.~~
- ~~As assigned, issue written and oral instructions; assign duties and examines work for exactness, neatness, and conformance to policies and procedures.~~
- ~~Performs or assists subordinates in performing duties; adjusts errors and complaints.~~
- ~~Prepare a variety of studies; reports and related information for decision-making purposes~~
- ~~Prepares attendance, accident and routine accounting reports.~~
- ~~Supervise classes, workshops and activities for persons engaged in the programs and co-sponsored programs. Coordinate part-time staff in the development and implementation of programs.~~
- ~~Perform a variety of miscellaneous duties such as answering phones, typing correspondence, picking up supplies needed for activities, conducting classes, selling tickets, collecting fees, officiating at events/classes; making arrangements for rentals and use of facilities, helping set up for classes, events, etc.~~
- ~~Prepares for review a variety of brochures, calendars, letters, posters, news releases, flyers, and related communications regarding programs.~~
- ~~Promote interest and provides information regarding programs to community officials, other recreation officials, community service groups, other departments/divisions, and the general public.~~
- ~~Oversee the custodial maintenance of assigned park or facility.~~
- ~~May serve as a member of various employee committees, as assigned.~~
- ~~Assist in the planning and management of any concession related activities, including design, layout, operation, inventory, contracting and staffing.~~

- ~~Serve as an information resource to other divisions, departments outside agencies, and the general public.~~
- ~~Attend and participate in professional group meetings; stay abreast of new trends and innovations in the field of recreation and parks.~~
- ~~Assist with surveying and educating the community on recreation programs.~~
- ~~Assist other staff in a variety of special events or special projects.~~
- ~~May require some Holiday, evening, and/or weekend work assignments.~~

QUALIFICATIONS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Thorough to comprehensive knowledge of: operations, services and activities of parks and recreation programs; principles and practices of recreation program development and administration; marketing theories, principles and practices as related to recreation services; principles of budget preparation and control; procurement practices; principles of supervision, training, and performance evaluation.
- Thorough to comprehensive ability to: read, analyze, and interpret documents in area of expertise, technical procedures, or government regulations; write reports, correspondence and procedure



Pleasant Valley Recreation and Park District Job Description

manuals; communicate effectively in written and oral form; present information and respond to questions.

EDUCATION and/or EXPERIENCE: Recommended Associates degree with major course work in applicable field; and two years of experience working with recreation programs, including six months of lead or supervisory responsibility, or one year of paid experience in supervision of public recreation programs involving supervision of part-time recreation leaders, personnel, and volunteers (2,000 hours of part-time and/or internship experience is equivalent to one year of full-time experience), or equivalent combination of education and experience.

CERTIFICATES, LICENSES, REGISTRATIONS: Position requires average amount of driving, therefore, must have daily access to a vehicle, and possess a valid California driver's license and maintain appropriate insurance on vehicle used in the course of business duties. Position may involve driving to events as a representative of the District. CPR and First Aid Certification required no later than six (6) months after employment. Successful completion of tuberculosis, alcohol and drug screenings and criminal justice fingerprint clearance/background check required.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential ~~functions.~~functions. While performing the duties of this job, the employee is frequently required to stand; sit; twist, and use hands to finger, handle, or feel. The employee is frequently required to walk; reach with hands and arms; climb or balance; stoop, kneel, crouch, or crawl; and talk or hear. The employee must frequently lift and/or move up to 10 pounds, frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 75 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is occasionally exposed to risk of electrical shock. The noise level in the work environment is usually loud. This position may require overtime and adjusted schedules for special events.

Job Title:	Recreation Supervisor	Category:	Management
Department:	Recreation	Prepared Date:	June 2022
Reports To:	Recreation Manager	Approved by:	Board of Directors
FLSA Status:	Exempt	Approved Date:	July 6, 2022

SUMMARY: Plans, oversees and supervises comprehensive recreational programs of cultural, arts, youth and adult sports, contract classes, senior citizen programs or other recreation programs involving the supervision of group instructors, contractors, staff and volunteers in the planning of activities and events. Performs contract administration for contractual instructors. Prepares and administers department/section budget. Ensures safe work practices, work quality and accuracy; prepares, supervises and maintains work records and reports; serves as a technical resource for assigned personnel. Provides written and oral reports to the Recreation Services Manager, General Manager, and the Board of Directors.

ESSENTIAL DUTIES AND RESPONSIBILITIES: Includes the following, with a focus of Quality Customer Service being primary for all positions. Position will require some holiday, evening, and/or weekend work assignments. Performs additional duties as assigned.

- Responsible for planning, directing, organizing, managing, and controlling the operational budget.
- Directly supervise and manage part-time, full-time employees, contract instructors, and volunteers. To include onboarding, training, scheduling, professional development, H.R related items while adhering to District guidelines, policies, and procedures
- Develop, conduct, promote, supervise, manage, and participate in various activities, programs, events, and rentals to include use of equipment, facility management and programming, while maintaining records, preparing evaluation reports on programs and maintain district reports
- Will provide support with marketing/programming material for recreational programs to include public relations, print materials, and digital media
- Serve as liaison between Pleasant Valley Recreation and Park District and Community Service Group Organizations; negotiate and resolve significant and controversial issues.
- Will open, close, secure, setup/break-down and maintain a safe program environment and facilities that align with District rules and regulations
- Evaluate programs and facilities to ensure optimum utilization and service to community to ensure recreation programs meet the needs of the community of all ages and abilities, while implementing market driven initiatives
- Respond to public and internal inquiries made by telephone, correspondence, or during public meetings about activities, programs, and events while maintaining a professional attitude and appearance
- Demonstrate continuous effort to improve operations, streamline work processes within the District and outside organizations
- Attend board meetings; prepare and present staff reports and other necessary board items
- Perform cash handling duties using basic mathematical calculations with speed and accuracy, receive payment, count money and make change, and prepare District reports
- Respond to injuries by administering First Aid, CPR, and rescue breathing if needed and adhering to District guidelines, policies and procedures
- Maintain communications and effective working relationships with co-workers, supervisors, other governmental agencies non-profit organizations, civic groups, elected and appointed officials, community groups and the public-at-large
- Represent the department/District on various boards, committees and within community, government, and civic organizations
- Attend and participate in professional group meetings/training staying abreast of new trends and innovations in the field of recreation and parks

OTHER SKILLS AND ABILITIES: Knowledge and experience with materials, methods, practices, and equipment in relation to recreation programs. Must be able to “multitask” to handle competing priorities and demands. Must be able to keep accurate records and prepare reports.

QUALIFICATIONS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Thorough to comprehensive knowledge of: common office practices; current recreation trends; principles of supervision, employee motivation, training and performance evaluation.
- Working knowledge of: social and advocacy programs, services, and activities within the recreation field; laws and regulations governing recreation programs.
- Ability to read, analyze and interpret periodicals related to area of expertise, technical procedures, or government regulations. Ability to write reports, correspondence, procedure manuals or articles. Ability to effectively communicate, present information in oral and written form, and respond to questions from managers and the general public; interpret and explain pertinent District policies and procedures.
- Ability to: assist in the development and monitoring of an assigned program budget; develop and recommend policies and procedures related to assigned operations; coordinate, organize, implement, and publicize recreation and leisure time activities and specialized events.

EDUCATION and/or EXPERIENCE: Bachelor’s Degree in recreation, physical education, leisure studies, sociology, gerontology, communications, health care profession, or related field with minimum of four (4) years of progressive experience in recreation, including two (2) years of supervisory experience, or equivalent combination of education and experience

CERTIFICATES, LICENSES, REGISTRATIONS: Position requires average amount of driving, therefore, must have daily access to a vehicle, and possess a valid California driver’s license, and maintain appropriate insurance on vehicle used in the course of business duties. Position may involve driving to events as a representative of the District. CPR and First Aid Certification required no later than six (6) months after employment. Successful completion of tuberculosis, drug and alcohol screening and criminal justice fingerprint clearance/background check required.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to stand; sit; twist, and use hands to finger, handle, or feel. The employee is frequently required to walk; reach with hands and arms; climb or balance; stoop, kneel, crouch, or crawl; and talk or hear. The employee must frequently lift and/or move up to 10 pounds, frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 75 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is occasionally exposed to risk of electrical shock. The noise level in the work environment is usually loud.



Pleasant Valley Recreation and Park District Job Description

Job Title:	Recreation Supervisor	Category:	Management
Department:	Recreation	Prepared Date:	March 2020
Reports To:	Recreation Manager	Approved by:	Board of Directors
FLSA Status:	Exempt	Approved Date:	May 6, 2020

SUMMARY: Plans, oversees and supervises comprehensive recreational programs of cultural, arts, youth ~~and~~ adult sports, contract classes, senior citizen programs or other recreation programs involving the supervision of group instructors, contractors, staff and volunteers in the planning of activities and events. Performs contract administration for contractual instructors. Prepares and administers department/section budget. Ensures safe work practices, work quality and accuracy; prepares, supervises and maintains work records and reports; serves as a technical resource for assigned personnel. Provides written and oral reports to the Recreation Services Manager, General Manager, and the Board of Directors.

ESSENTIAL DUTIES AND RESPONSIBILITIES: Includes the following, with a focus of Quality Customer Service being primary for all positions. Position will require some holiday, evening, and/or weekend work assignments. Performs additional duties as assigned.

- Responsible for planning, directing, organizing, managing, and controlling the operational budget.
- Directly supervise and manage part-time, full-time employees, contract instructors, and volunteers. To include onboarding, training, scheduling, professional development, H.R related items while adhering to District guidelines, policies, and procedures
- Develop, conduct, promote, supervise, manage, and participate in various activities, programs, events, and rentals to include use of equipment, facility management and programming , while maintaining records, preparing evaluation reports on programs and maintain district reports
- Will provide support with marketing/programming material for recreational programs to include public relations, print materials, and digital media
- Serve as liaison between Pleasant Valley Recreation and Park District and Community Service Group Organizations; negotiate and resolve significant and controversial issues.
- Will open, close, secure, setup/break-down and maintain a safe program environment and facilities that align with District rules and regulations
- Evaluate programs and facilities to ensure optimum utilization and service to community to ensure recreation programs meet the needs of the community of all ages and abilities, while implementing market driven initiatives
- Respond to public and internal inquiries made by telephone, correspondence, or during public meetings about activities, programs, and events while maintaining a professional attitude and appearance
- Demonstrate continuous effort to improve operations, streamline work processes within the District and outside organizations
- Attend board meetings; prepare and present staff reports and other necessary board items
- Perform cash handling duties using basic mathematical calculations with speed and accuracy, receive payment, count money and make change, and prepare District reports
- Respond to injuries by administering First Aid, CPR, and rescue breathing if needed and adhering to District guidelines, policies and procedures
- Maintain communications and effective working relationships with co-workers, supervisors, other governmental agencies non-profit organizations, civic groups, elected and appointed officials, community groups and the public-at-large
- Represent the department/District on various boards, committees and within community, government, and civic organizations
- Attend and participate in professional group meetings/training staying abreast of new trends and innovations in the field of recreation and parks
- ~~Responsible for planning, directing, organizing and controlling the operational budget.~~



Pleasant Valley Recreation and Park District Job Description

- Establish and maintain an open and effective system of communication throughout the organization.
- Advocate and work closely with citizens and other service providers in a cooperative community response to program needs including but not limited to non-profit organizations, Pleasant Valley Recreation & Park Foundation, civic groups, and other governmental agencies.
- Directly supervise assigned employees and program volunteers; interview, hire and train new employees; address employee complaints and resolve personnel issues; plan, assign and schedule assigned employees.
- Adapt recreation programs to meet the needs of the District's clientele of all ages and abilities.
- Maintain communications and effective working relationships with co-workers, supervisors, other governmental agencies, elected and appointed officials, community groups and the public at large.
- Prepare calendar of events, including newsletters, public relations announcements, and other similar communications.
- Ability to communicate effectively with the general public, organization, employees, user groups, and community leaders in oral and written form.
- Plan, implement, schedule and evaluate special events and activities related to program to which assigned.
- Participate in training of recreation staff and volunteers as needed.
- Serve as liaison between Pleasant Valley Recreation and Park District and Community Service Groups; negotiate and resolve significant and controversial issues.
- Coordinate and solicit co-sponsorships with commercial businesses and non-profit agencies to provide financial support in offering a wide variety of special events. Follow up with potential supporters as appropriate.
- Develop and implement training programs to improve/develop employee skills.
- May require some Holiday, evening, and/or weekend work assignments.

OTHER SKILLS AND ABILITIES: Knowledge and experience with materials, methods, practices, and equipment in relation to recreation programs. Must be able to "multitask" to handle competing priorities and demands. Must be able to keep accurate records and prepare reports.

QUALIFICATIONS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Thorough to comprehensive knowledge of: common office practices; current recreation trends; principles of supervision, employee motivation, training and performance evaluation.
- Working knowledge of: social and advocacy programs, services, and activities within the recreation field; laws and regulations governing recreation programs.
- Ability to read, analyze and interpret periodicals related to area of expertise, technical procedures, or government regulations. Ability to write reports, correspondence, procedure manuals or articles. Ability to effectively communicate, present information in oral and written form, and respond to questions from managers and the general public; interpret and explain pertinent District policies and procedures.
- Ability to: assist in the development and monitoring of an assigned program budget; develop and recommend policies and procedures related to assigned operations; coordinate, organize, implement, and publicize recreation and leisure time activities and specialized events.

EDUCATION and/or EXPERIENCE: Bachelor's Degree in recreation, physical education, leisure studies, sociology, gerontology, communications, health care profession, or related field with minimum of four (4) years



Pleasant Valley Recreation and Park District Job Description

of progressive experience in recreation, including two (2) years of supervisory experience, or equivalent combination of education and experience

CERTIFICATES, LICENSES, REGISTRATIONS: Position requires average amount of driving, therefore, must have daily access to a vehicle, and possess a valid California driver's license, and maintain appropriate insurance on vehicle used in the course of business duties. Position may involve driving to events as a representative of the District. CPR and First Aid Certification required no later than six (6) months after employment. Successful completion of tuberculosis, drug and alcohol screening and criminal justice fingerprint clearance/background check required.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to stand; sit; twist, and use hands to finger, handle, or feel. The employee is frequently required to walk; reach with hands and arms; climb or balance; stoop, kneel, crouch, or crawl; and talk or hear. The employee must frequently lift and/or move up to 10 pounds, frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 75 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is occasionally exposed to risk of electrical shock. The noise level in the work environment is usually loud.

Job Title: Recreation Supervisor - Aquatics
Department: Recreation
Reports To: Recreation Manager
FLSA Status: Exempt

Category: Management
Prepared Date: June 2022
Approved by: Board of Directors
Approved Date: July 6, 2022

SUMMARY: Plans, oversees and supervises comprehensive recreational programs of aquatics, cultural, arts, youth and adult sports, contract classes, senior citizen programs or other recreation programs involving the supervision of group instructors, contractors, staff and volunteers in the planning of activities and events. Performs contract administration for contractual instructors. Prepares and administers department/section budget. Ensures safe work practices, work quality and accuracy; prepares, supervises and maintains work records and reports; serves as a technical resource for assigned personnel. Provides written and oral reports to the Recreation Services Manager, General Manager, and the Board of Directors.

ESSENTIAL DUTIES AND RESPONSIBILITIES: Includes the following, with a focus of Quality Customer Service being primary for all positions. Position will require some holiday, evening, and/or weekend work assignments. Performs additional duties as assigned.

- Responsible for planning, directing, organizing, managing, and controlling the operational budget.
- Directly supervise and manage part-time, full-time employees, contract instructors, and volunteers. To include onboarding, training, scheduling, professional development, H.R related items while adhering to District guidelines, policies, and procedures
- Develop, conduct, promote, supervise, manage, and participate in various activities, programs, events, and rentals to include use of equipment, facility management and programming, while maintaining records, preparing evaluation reports on programs and maintain district reports
- Will provide support with marketing/programming material for recreational programs to include public relations, print materials, and digital media
- Serve as liaison between Pleasant Valley Recreation and Park District and Community Service Group Organizations; negotiate and resolve significant and controversial issues.
- Will open, close, secure, setup/break-down and maintain a safe program environment and facilities that align with District rules and regulations
- Evaluate programs and facilities to ensure optimum utilization and service to community to ensure recreation programs meet the needs of the community of all ages and abilities, while implementing market driven initiatives
- Respond to public and internal inquiries made by telephone, correspondence, or during public meetings about activities, programs, and events while maintaining a professional attitude and appearance
- Demonstrate continuous effort to improve operations, streamline work processes within the District and outside organizations
- Attend board meetings; prepare and present staff reports and other necessary board items
- Perform cash handling duties using basic mathematical calculations with speed and accuracy, receive payment, count money and make change, and prepare District reports
- Respond to injuries by administering First Aid, CPR, and rescue breathing if needed and adhering to District guidelines, policies and procedures
- Maintain communications and effective working relationships with co-workers, supervisors, other governmental agencies non-profit organizations, civic groups, elected and appointed officials, community groups and the public-at-large
- Represent the department/District on various boards, committees and within community, government, and civic organizations
- Attend and participate in professional group meetings/training staying abreast of new trends and innovations in the field of recreation and parks

Maintain communications and effective working relationships with co-workers, supervisors, other governmental agencies non-profit organizations, civic groups, elected and appointed officials, community groups and the public-at-large

OTHER SKILLS AND ABILITIES: Knowledge and experience with materials, methods, practices, and equipment in relation to recreation programs. Must be able to “multitask” to handle competing priorities and demands. Must be able to keep accurate records and prepare reports.

QUALIFICATIONS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Thorough to comprehensive knowledge of: common office practices; current recreation trends; principles of supervision, employee motivation, training and performance evaluation.
- Working knowledge of: social and advocacy programs, services, and activities within the recreation field; laws and regulations governing recreation programs.
- Ability to read, analyze and interpret periodicals related to area of expertise, technical procedures, or government regulations. Ability to write reports, correspondence, procedure manuals or articles. Ability to effectively communicate, present information in oral and written form, and respond to questions from managers and the general public; interpret and explain pertinent District policies and procedures.
- Ability to: assist in the development and monitoring of an assigned program budget; develop and recommend policies and procedures related to assigned operations; coordinate, organize, implement, and publicize recreation and leisure time activities and specialized events.

EDUCATION and/or EXPERIENCE: Bachelor’s Degree in recreation, physical education, leisure studies, sociology, gerontology, communications, health care profession, or related field with minimum of four (4) years of progressive experience in recreation, including two (2) years of supervisory experience, or equivalent combination of education and experience

CERTIFICATES, LICENSES, REGISTRATIONS: Required certificates include: Current American Red Cross (ARC) certifications in Lifeguarding, CPR, First Aid & Oxygen Administration; Title 22; ARC Lifeguard Instructor; CPR for the Professional Rescuer, Water Safety Instructor (WSI), and preferred certifications include: Water Safety Instructor Trainer (WSIT), and Emergency Response Trainer. A Certified Pool Operator (CPO) designation is preferred. Position requires average amount of driving, therefore, must have daily access to a vehicle, and possess a valid Driver’s License, and maintain appropriate insurance on vehicle used in the course of business duties. Position may involve driving to events as a representative of the District. Successful completion of tuberculosis, drug and alcohol screening and criminal justice fingerprint clearance/background check required.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to stand; sit; twist, and use hands to finger, handle, or feel. The employee is frequently required to walk; reach with hands and arms; climb or balance; stoop, kneel, crouch, or crawl; and talk or hear. The employee must frequently lift and/or move up to 10 pounds, frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 75 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this

job, the employee is occasionally exposed to risk of electrical shock. The noise level in the work environment is usually loud.



Pleasant Valley Recreation and Park District Job Description

Job Title: Recreation Supervisor - Aquatics
Department: Recreation
Reports To: Recreation Manager
FLSA Status: Exempt

Category: Management
Prepared Date: June 2020
Approved by: Board of Directors
Approved Date: July 1, 2020

SUMMARY: Plans, oversees and supervises comprehensive recreational programs of aquatics, cultural, arts, youth ~~or~~ and adult sports, contract classes, senior citizen programs or other recreation programs involving the supervision of group instructors, contractors, staff and volunteers in the planning of activities and events. Performs contract administration for contractual instructors. Prepares and administers department/section budget. Ensures safe work practices, work quality and accuracy; prepares, supervises and maintains work records and reports; serves as a technical resource for assigned personnel. Provides written and oral reports to the Recreation Services Manager, General Manager, and the Board of Directors.

ESSENTIAL DUTIES AND RESPONSIBILITIES: Includes the following, with a focus of Quality Customer Service being primary for all positions. Position will require some holiday, evening, and/or weekend work assignments. Performs additional duties as assigned.

- ~~• Responsible for planning, directing, organizing and controlling the operational budget.~~
- ~~• Establish and maintain an open and effective system of communication throughout the organization.~~
- ~~• Advocate and work closely with citizens and other service providers in a cooperative community response to program needs including but not limited to non-profit organizations, Pleasant Valley Recreation & Park Foundation, civic groups, and other governmental agencies.~~
- ~~• Directly supervise assigned employees and program volunteers; interview, hire and train new employees; address employee complaints and resolve personnel issues; plan, assign and schedule assigned employees.~~
- ~~• Adapt recreation programs to meet the needs of the District's clientele of all ages and abilities.~~
- ~~• Maintain communications and effective working relationships with co-workers, supervisors, other governmental agencies, elected and appointed officials, community groups and the public-at-large.~~
- ~~• Prepare calendar of events, including newsletters, public relations announcements, and other similar communications.~~
- ~~• Ability to communicate effectively with the general public, organization, employees, user groups, and community leaders in oral and written form.~~
- ~~• Plan, implement, schedule and evaluate special events and activities related to program to which assigned.~~
- ~~• Participate in training of recreation staff and volunteers as needed.~~
- ~~• Serve as liaison between Pleasant Valley Recreation and Park District and Community Service Groups; negotiate and resolve significant and controversial issues.~~
- ~~• Coordinate and solicit co-sponsorships with commercial businesses and non-profit agencies to provide financial support in offering a wide variety of special events. Follow up with potential supporters as appropriate.~~
- ~~• Develop and implement training programs to improve/develop employee skills.~~
- ~~• May require some Holiday, evening, and/or weekend work assignments.~~
- Responsible for planning, directing, organizing, managing, and controlling the operational budget.
- Directly supervise and manage part-time, full-time employees, contract instructors, and volunteers. To include onboarding, training, scheduling, professional development, H.R related items while adhering to District guidelines, policies, and procedures
- Develop, conduct, promote, supervise, manage, and participate in various activities, programs, events, and rentals to include use of equipment, facility management and programming , while maintaining records, preparing evaluation reports on programs and maintain district reports
- Will provide support with marketing/programming material for recreational programs to include public relations, print materials, and digital media



Pleasant Valley Recreation and Park District Job Description

- Serve as liaison between Pleasant Valley Recreation and Park District and Community Service Group Organizations; negotiate and resolve significant and controversial issues.
- Will open, close, secure, setup/break-down and maintain a safe program environment and facilities that align with District rules and regulations
- Evaluate programs and facilities to ensure optimum utilization and service to community to ensure recreation programs meet the needs of the community of all ages and abilities, while implementing market driven initiatives
- Respond to public and internal inquiries made by telephone, correspondence, or during public meetings about activities, programs, and events while maintaining a professional attitude and appearance
- Demonstrate continuous effort to improve operations, streamline work processes within the District and outside organizations
- Attend board meetings; prepare and present staff reports and other necessary board items
- Perform cash handling duties using basic mathematical calculations with speed and accuracy, receive payment, count money and make change, and prepare District reports
- Respond to injuries by administering First Aid, CPR, and rescue breathing if needed and adhering to District guidelines, policies and procedures
- Maintain communications and effective working relationships with co-workers, supervisors, other governmental agencies non-profit organizations, civic groups, elected and appointed officials, community groups and the public-at-large
- Represent the department/District on various boards, committees and within community, government, and civic organizations
- Attend and participate in professional group meetings/training staying abreast of new trends and innovations in the field of recreation and parks

Maintain communications and effective working relationships with co-workers, supervisors, other governmental agencies non-profit organizations, civic groups, elected and appointed officials, community groups and the public-at-large

OTHER SKILLS AND ABILITIES: Knowledge and experience with materials, methods, practices, and equipment in relation to recreation programs. Must be able to “multitask” to handle competing priorities and demands. Must be able to keep accurate records and prepare reports.

QUALIFICATIONS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Thorough to comprehensive knowledge of: common office practices; current recreation trends; principles of supervision, employee motivation, training and performance evaluation.
- Working knowledge of: social and advocacy programs, services, and activities within the recreation field; laws and regulations governing recreation programs.
- Ability to read, analyze and interpret periodicals related to area of expertise, technical procedures, or government regulations. Ability to write reports, correspondence, procedure manuals or articles. Ability to effectively communicate, present information in oral and written form, and respond to questions from managers and the general public; interpret and explain pertinent District policies and procedures.
- Ability to: assist in the development and monitoring of an assigned program budget; develop and recommend policies and procedures related to assigned operations; coordinate, organize, implement, and publicize recreation and leisure time activities and specialized events.

EDUCATION and/or EXPERIENCE: Bachelor’s Degree in recreation, physical education, leisure studies, sociology, gerontology, communications, health care profession, or related field with minimum of four (4) years of progressive experience in recreation, including two (2) years of supervisory experience, or equivalent combination of education and experience



Pleasant Valley Recreation and Park District Job Description

CERTIFICATES, LICENSES, REGISTRATIONS: Required certificates include: Current American Red Cross (ARC) certifications in Lifeguarding, CPR, First Aid & Oxygen Administration; Title 22; ARC Lifeguard Instructor; CPR for the Professional Rescuer, Water Safety Instructor (WSI), and preferred certifications include: Water Safety Instructor Trainer (WSIT), and Emergency Response Trainer. A Certified Pool Operator (CPO) designation is preferred. Position requires average amount of driving, therefore, must have daily access to a vehicle, and possess a valid Driver's License, and maintain appropriate insurance on vehicle used in the course of business duties. Position may involve driving to events as a representative of the District. Successful completion of tuberculosis, drug and alcohol screening and criminal justice fingerprint clearance/background check required.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to stand; sit; twist, and use hands to finger, handle, or feel. The employee is frequently required to walk; reach with hands and arms; climb or balance; stoop, kneel, crouch, or crawl; and talk or hear. The employee must frequently lift and/or move up to 10 pounds, frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 75 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is occasionally exposed to risk of electrical shock. The noise level in the work environment is usually loud.

**PLEASANT VALLEY RECREATION AND PARK DISTRICT
STAFF REPORT / AGENDA REPORT**

TO: BOARD OF DIRECTORS

FROM: MARY OTTEN, GENERAL MANAGER

DATE: July 6, 2022

SUBJECT: CONSIDERATION AND APPROVAL OF REQUEST FOR PROPOSALS FOR AN EMPLOYEE CLASSIFICATION AND COMPENSATION STUDY

SUMMARY

To attract, develop and retain a talented and dedicated workforce that empowers our employees to provide the highest level of service to our community of residents and businesses, it is necessary to review and update the entire classification and compensation structure for employees to determine its effectiveness and seek a strategy to improve a plan where needed.

BACKGROUND

The most recent District wide employee classification and compensation study was completed more than 15 years ago. During the interim, the Administration Department staff has worked with departments to review individual classifications, job descriptions, and update classifications specifications on an on-going and regular basis. The District has provided occasional compensation adjustments over the years, but District wide compensation surveys have not been conducted. It is considered a best practice to conduct an agency wide class and compensation study every five to seven years.

ANALYSIS

The purpose of the classification and compensation study is to address changes in the District's operations, organizational structure, reporting relationships, and staffing which may have affected the type, scope, level, and classification of work being performed by employees. With increased employee turnover, it is also critical to evaluate compensation to determine the District's competitiveness in the marketplace. The information from both components of the study will facilitate a plan to address classification issues and improve compensation, which will increase the District's ability to attract and retain a quality labor force. However, this could illuminate that the District is behind relative to the labor market, and it may be a challenge to address given the District's limited resources.

The study will encompass approximately twenty classifications and forty-two regular status positions, within three departments and one labor group. The selected consultant will perform the following key functions for the District's regular status positions and provide a comprehensive written report that will serve as the foundation for establishing revised compensation parameters and updating existing classification structures. Specifically, the RFP indicates that the consultant will:

1. Develop goals and establish priorities and practices for all aspects of the classification and compensation system.
2. Develop a comprehensive communication plan regarding the classification and compensation study.
3. Analyze the current established labor market agencies to ensure they meet the District's needs. Recommend changes to labor market agencies where necessary.
4. Assist in identifying positions that may be improperly classified. Conduct job audits of identified positions, including reviewing Job Analysis Questionnaire, and conducting employee interviews; recommend classification modifications where necessary.
5. Review all job specifications and revise where necessary. Confirm legal compliance with federal and state labor and employment laws, including the Fair Labor Standards Act (exemption/non-exempt) and Americans with Disabilities Act. Update technical requirements where necessary.
6. Conduct a total compensation labor market analysis (salary and benefits) using established or revised benchmarked classifications.
7. Address compaction issues and future pay compression related to the increases in minimum wage.
8. Develop a strategy for implementing the results of the study, including how to establish salaries for classification that are above market. Consider the District's financial constraints, provide multiple options for implementations, including partial and full implementation over a multi-year period. Assist in implementing the results of the study by determining the short-and-long-term fiscal impact to the District for providing market adjustments.
9. Upon the conclusion of the study, provide summary report with detailed analysis and recommendations, revised job specifications, salary ranges, benchmark listing, and market survey agency listing.

FISCAL IMPACT

There is no fiscal impact associated with this action, however, upon selection of a consultant, the District will be obligated to remit payment with their contract. The 2022-2023 proposed budget has allotted \$60,000 for the Classification and Compensation Study.

STRATEGIC PLAN COMPLIANCE

Meets 2021 Strategic Plan Goal 5.1: Position the District to attract and retain high-quality employees.

RECOMMENDATION

It is recommended that the Board of Directors consider and approve the Request for Proposals for the Employee Classification and Compensation Study.

ATTACHMENTS

- 1) Classification and Compensation RFP (12 pages)
- 2) Sample Professional Services Agreement (13 pages)

**PLEASANT VALLEY RECREATION & PARK DISTRICT
REQUEST FOR PROPOSALS
FOR
CLASSIFICATION AND COMPENSATION STUDY**



RFP RELEASE DATE:

THURSDAY, JULY 7, 2022

PROPOSALS DUE:

FRIDAY, AUGUST 5, 2022

No Later Than 4:00 PM PDT

DELIVER PROPOSALS TO:

ADMINISTRATIVE OFFICE

PLEASANT VALLEY RECREATION & PARK DISTRICT

Attn: Mary Otten, General Manager

1605 E. Burnley Street, Camarillo, CA 93010

Phone: (805) 482-1996

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NOTICE INVITING PROPOSALS FOR CONSULTING SERVICES TO PERFORM A CLASSIFICATION AND COMPENSATION STUDY

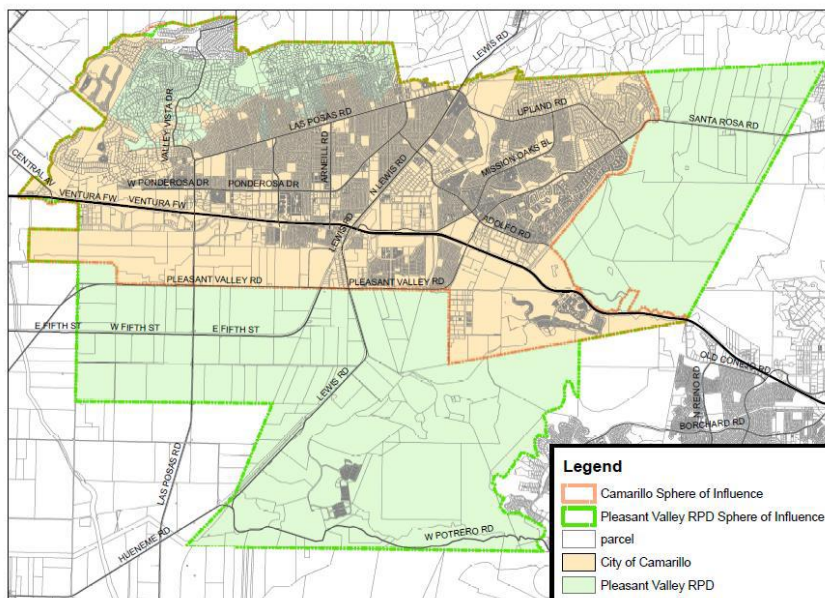
Introduction

The Pleasant Valley Recreation and Park District (“District”) is issuing this Request for Proposals (“RFP”) from experienced and qualified professional firms (“Consultant”) to perform a review and development of job classifications, total compensation analysis, staffing levels and organizational evolution for government agencies. The District expects the firm to review our existing classification and compensation system, consider employee input, market conditions and industry trends and make recommendations for updates. Additionally, the expectation is to have a final product that allows the District to update/add classifications and compensation as needed. This project will serve as the first comprehensive classification and compensation study for the District.

District Background

The District, an independent special district, was formed in January 1962 under the State Public Resources Code of California. The birth of the District was approved by the voters in the Camarillo community to provide quality programs, parks and facilities that could be enjoyed by everyone. The District is located in and around the city of Camarillo, serves a population of over 70,000 and covers an area of approximately 45 square miles. It has grown from one park to 28 parks since its inception 60 years ago. Within the District, a variety of recreational facilities exist including: a senior center, an indoor aquatic center, a community center, dog parks, lighted ball fields, tennis and pickleball courts, a running track, walking paths, premier soccer fields, hiking trails, picnic pavilions, children’s play equipment, and barbecue areas. The City of Camarillo, incorporated in 1964, is a separate entity from the District, however, they do add recreational and cultural service value and amenities to the community by owning two small parks, a trail system and full-service library that it operates independently of the District.

Below is a map that displays the District’s and the City’s respective Spheres of Influence:



The District operates with a five-member Board operating under the board/general manager form of government. The Board members are currently elected at large, however, will be moving to Divisions with the upcoming 2022 elections and serve as the District's legislative and policy making body. The General Manager is responsible for directing District affairs as prescribed by the District Board and handling the administration of day-to-day activities of the District employees.

District departments include Administration, Recreation and Parks. Overall, the District has approximately 45 full-time employees and an additional 100 part-time employees.

The purpose of this document is to provide proposers with the information needed to submit a proposal for review by the District and, if selected, enter into a Professional Services Agreement with the District.

Project Goals & Objectives

The goal of the study is to develop an updated classification & compensation model and guidance documents that ensure that all positions within the PVRPD are internally equitable and externally competitive.

The District's objectives are to:

1. Attract and retain qualified employees;
2. Ensure that compensation within the organization is equitable and transparent;
3. Ensure positions performing similar work with essentially the same level of complexity, responsibility, and knowledge, skills, and abilities are classified together;
4. Provide salaries commensurate with assigned duties;
5. Clearly outline promotional opportunities and provide recognizable compensation growth;
6. Provide justifiable pay differential between individual classes;
7. Maintain a competitive position with other comparable government entities and private employers within the same geographic areas; and
8. Develop a compensation model that is financially sustainable given PVRPD's unique budgetary constraints.

All work will be done with regular involvement of the General Manager and Department Heads, with other key personnel involved as necessary. Regular presentations and meetings with these individuals or groups and incorporating their input into the process are expected. Presentation to the District Board upon completion of the project is also expected.

The end product of the study will include a comprehensive benchmark analysis of all PVRPD wages and benefits, and updated classification & compensation model, a revised salary schedule, and recommendations on implementation of the study, including salary determination and employee progression methodology, monitoring for market position and internal equity, and other policies and procedures related to compensation.

Project Scope

The consultant will review current class specifications and ensure they are in line with current changes and requirements in the law, identify class specifications that need to be updated to

reflect current job duties and requirements of the position and include physical requirements and essential job functions to comply with the American with Disabilities Act (ADA).

The study shall evaluate the present organizational structure and provide recommendations to ensure it is efficient and effective. The study shall evaluate salary structure as compared to the specific job market for comparable positions in public and comparable private employers within the same geographic area. The consultant shall perform or provide the following:

A. Classification Study

- i. Meet with key PVRPD staff to review/discuss and finalize study goals, process, schedule, and other administrative details.
- ii. Review, update, and provide recommendations on the PVRPD classification system, including review of existing position descriptions to ensure accurate FLSA status, essential job functions, minimum qualifications (education/experience), required knowledge, skills and abilities (KSA)'s, and compliance with federal, state, and local regulations.
- iii. Conduct salary surveys both vertically (District identified as comparable) and horizontally (other industry organizations that have comparable positions) and establish benchmark standards.
- iv. Address compaction issues and future pay compression related to the increase in minimum wage.
- v. Integrate the results of the benchmark and internal analyses into an updated classification model, which includes a detailed listing that identifies the proposed placement of all PVRPD positions within the model, and support for the proposed placement.
- vi. Develop recommendations for the administration and maintenance of the updated classification mode, including:
 - Methodology for employee progression through the updated classification model.
 - Updates to other policies and procedures related to classification.
- vii. Recommend implementation measures for the Human Resources Team, as well as a comprehensive transfer of knowledge program so the HR Team can administer/explain the proposed program over time as the District is able. Implementation needs to include recommended prioritization of positions.
- viii. Recommend a maintenance system that would allow the Human Resources Team to keep the classification system current and equitable. This would include annual activities and the review of individual classifications.
- ix. Present findings, updated classifications, and recommendations in a written report.
- x. Final presentation to PVRPD Board for approval.

B. Meetings

- i. Initial meeting will be held with the General Manager, Department Heads and Administrative Analyst to discuss process/tasks to be performed, including reasonable dedication of key personnel.
- ii. Initial meeting with Department Heads to provide information regarding study methodology, process, timing and logistics.

- iii. Presentations and meetings with individuals/groups to gather information and answer questions as necessary.
 - a. Conduct interviews and/or job audits as appropriate, individually or in groups based upon body of work, team alignment and classification series.
- iv. Bi-weekly updates to General Manager and Administrative Analyst.
- v. Present proposed recommendations to General Manager, Department Heads, Administrative Analyst, and Human Resources Specialist for review prior to making any final classification determinations.

C. Compensation Analysis – shall consist of the following:

- i. Identify a suggested list of comparable cities and independent special districts to consider in the compensation study.
- ii. Identify survey labor market and classifications that represent most closely to the Pleasant Valley Recreation and Park District as well as private sector employers (the equivalent of three), who have similar classifications and may compete for qualified candidates. This will include an explanation of the specific methodology (i.e., articulable factors) used to identify the survey agencies.
- iii. Conduct a comprehensive compensation and benefits survey based on comparable survey agencies, using not only job titles, but duties and responsibilities based upon the classification specifications from the District. Include value of the total benefits package to the employee and the total cost to the employer of salary and all benefits, including:
 - Salary - base salary, employer paid retirement contributions, certification pay, educational incentive, standby pay, bonus pay, employer paid insurance contributions
 - Benefits - health, dental, vision, life insurance, accidental death and dismemberment, short term disability, long term disability, retirement
 - Leave Benefits– holiday leave, sick leave, vacation, paid-time-off, administrative leave, maximum accruals
- iv. Identify compression issues (current and foreseeable) and recommendations to remedy situations.
- v. Complete an internal base salary relationship analysis, including the development of appropriate internal relationship guidelines.
- vi. Develop external competitive and internal equitable salary recommendations for each classification included within the study.
- vii. Provide an outline for determining starting pay for all new hires. (Considering experience, licensure, or difficult to fill positions.)
- viii. Recommend appropriate salary ranges for each position based on the classification plan, compensation survey results and internal classification relationships and equalities, identifying any individual or group inequities and providing corrective action for remedy.
- ix. Recommend implementation strategies (including the cost of implementation by Department) which address key compensation practices.
 - Recommend implementation measures for the Management Team, as well as a comprehensive transfer of knowledge program so the Management

Team can administer/explain the proposed program over time as the District is able.

- Provide analysis on forecasting for future compensation expectations (i.e. wage growth).
- Recommend a maintenance system and toolsets that would allow the Management Team to keep the compensation system current and equitable. This could include annual activities and the review of individual classifications.

FINAL PRODUCT/DELIVERABLES

As part of the Services, Consultant will prepare and deliver the following tangible work products to the District.

1. Consultant is to provide bi-weekly project status reports to Mary Otten, General Manager and Dylan Gunning, Administrative Analyst outlining the following information:
 - a. The specific accomplishments archived during the prior two-week period.
 - b. Specific tasks completed pursuant to the provisions of the contract and the completion of such tasks
 - c. The project completion dates for the remaining specific tasks required by the Consultant.
 - d. Any project components, activity, or problem that could result in a delay of the project.
 - e. Any current or future changes in project personnel or their assignments.
 - f. Delays caused by District personnel.
2. Draft of preliminary finding and recommendations.
3. Final report must include:
 - a. Presentation at a scheduled District Board meeting to discuss recommendation and final report.
 - b. Comply with all legal requirements and be nondiscriminatory, compliant with federal, state and local requirements (ADA, FLSA, EEOC);
 - c. Be easy for management to administer, maintain and defend;
 - d. Follow methodology based on compensation principles considering internal and external equity within pay structure and comparable work;
 - e. Allow new positions to be incorporated into the structure, as well as maintain updates to manage plan's competitiveness; and
 - f. Be delivered in both hard copy and digital format allowing the ability to implement and manage the classification and compensation program, including final report, tables, charts, spreadsheets, schedules, classification specs, salary surveys and other materials.

Submission Requirements

Interested proposers must submit five (5) copies, plus an electronic version (PDF or Microsoft Word format) of the proposal on or before the deadline containing the following information to the District to be considered a viable candidate for this contract. Proposals shall not exceed 25 pages including any attachments (staff resumes do not count toward the page limit). Any proposal that does not contain the information outlined below shall not be considered.

1. Transmittal Letter to the Selection Committee

- a. The proposal must contain a cover letter, signed by an official authorized to commit the firm to the representations, commitments and statements contained in both the proposal and contracts. This should include the name, mailing address, email address, and phone number of the firm's primary contact person for the proposal. Firm advertising, brochures, and other promotional material should not be included.

2. Description and Qualifications of the Firm

- a. A description of the firm's organizational structure, the jurisdiction in which the firm is organized and date of such organization. In addition, provide a description of the firm's qualifications and experience in conducting classification and compensation studies for similar government / public sector entities. Failure to provide this information may be cause for the proposal to be rejected.

3. Staffing

- a. Provide an organizational chart identifying: 1) the project manager for the work; 2) each key person who would be assigned to carry out the work, and their respective roles in performing the work. Provide a separate description of the experience and qualifications of such manager and key persons, including a summary of experience on similar projects to those described in this proposal. Resumes should be included for all key individuals as an appendix to the submittal.
 - i. The District must approve changes to key personnel committed to work on the project subsequent to award of contract.

4. References

- a. A list of no more than three (3) references for the proposer and no more than three (3) references for any subconsultants, if proposed, including the names, addresses and telephone numbers of recent clients, preferably other public agencies and a listing of the specific projects and key individuals that have participated in them. Include the dollar amount related to the participation. Identify how much experience the firm and sub consultant, if needed, has had with public agencies.
- b. A minimum of two (2) examples of past work completed within the last five (5) years that represent the type of work requested in this RFP. Examples can be representative of projects with References or from separate completed projects. Please provide a brief description of these selected projects including when the project began, its current status, a description of the proposer's role/involvement in the project, and any specific information on how the community was responsive to the project.

5. Scope of Work

- a. A clear and concise statement of the proposer's understanding of the nature and extent of the services required.
- b. Approach to the project, highlighting the methodology and process to be used, components and expected deliverables.
- c. Provide a timeline for project completion.
- d. Provide a project schedule identifying start and end dates - include milestones, submittal of deliverables, and each task required for the successful and timely completion of the project. The desired effective implementation date of the results of the compensation and classification study is July 1, 2023.

- e. Indicate in your proposal any portion of work that would be performed by a sub-contractor.

6. Project Budget & Other Financial Information

- a. The proposer shall furnish the financial information requested below. If submitted by a consortium, a joint venture, a partnership, or by an individual, it shall be signed by an individual authorized to bind the firm making the proposal.
 - i. A firm must include in its proposal a complete disclosure of any alleged significant prior or ongoing contract failures, any civil or criminal litigation or investigation pending which involves the firm or in which the firm has been judged guilty or liable within the last five (5) years.
 - ii. If there is no negative history to disclose, the firm must affirmatively state in its proposal that there is no negative history to report.
 - iii. A sealed proposed fee schedule of costs to perform all work and obligations described within this Request For Proposal. Include incidental and hourly fees/rates, all projected reimbursable cost for travel (telephone, reports, and direct man hour rates), professional services, supplies and other related costs. A detailed Scope of Work, including an itemization of all services to be provided and their individual costs. This should include estimated staffing, hours, costs, and a description of each major task and subtask, including public meetings.
 - iv. A schedule of hourly rates to be charged for extra work if required during the course of the contract.
 - v. A disclosure of all personal, professional or financial relationships with any officer and/or employee of the District.

Evaluation Criteria

The objective is to choose the proposal that offers the highest quality services and will achieve the project’s goals and objectives within a reasonable budget. While cost is important, other factors are also significant and the District may not select the lowest cost proposal.

All proposals submitted in response to this RFP will be evaluated by a committee in accordance with the objectives mentioned above and the following criteria with a given point value listed below.

Selection Criteria—RFP	Points Available
Understanding of Scope of Work; Recommended Methodology & Process to include High Public Engagement	30
Project Components, Timeline, and Deliverables	20
Demonstrated Expertise in Performing Similar Work	15
Qualifications and Experience of Key Staff	15
References & Past Project Samples	10
Proposed Project Cost	10
Total Points Available Per Proposal	100

Total scores will be tabulated, and the highest ranked firm will enter into negotiations. If the District requests presentations by short-listed offerors, committee members may revise their initial scores based upon additional information and clarification received in this phase. Please note that presentations have not been scheduled and are not anticipated at this time. However, if the District elects to set up interviews and the firm is invited to give a presentation to the committee, notice will be given with a set date.

Firm Selection & Notification

The issuance of this RFP and the selection of the most qualified firms is the first step in the process that will eventually lead to the execution of an agreement with the most qualified firm. Each proposal will be reviewed to determine if it meets the submittal requirements contained within this RFP.

The successful Consultant to whom work is awarded shall, within 30 days of Board approval, enter into a contract with the District for the work in accordance with the specifications and shall furnish all required documents necessary to enter into said contract.

The District reserves the right to enter into a contract without further discussion of the submitted proposal. Therefore, the proposal should be initially submitted on the most favorable terms the proposer can offer.

The District reserves the right to accept and or withdraw the RFP in whole or in part, at any time and for any reason and or request additional information from all proposers. Submission of a proposal confers no rights upon a proposer and does not obligate the District in any manner. The District also reserves the right to modify any aspects or waive any irregularities, terminate, or delay this RFP, the RFP process, and or the program, which is outlined within this RFP at any time if doing so would serve the interest of the District. Contract award will be made at the sole discretion of the District based on evaluation of all responses.

Each proposer, by submitting a proposal, agrees that if the District accepts its proposal, such proposer will furnish all items and services upon the terms and conditions in this RFP and subsequent contract. Proposals that do not meet the mandatory requirements set forth in this RFP will be considered non-compliant. Proposers may be disqualified, and the proposal may be rejected by the District for any of, but not limited to, the following reasons:

- Failure to properly respond to the RFP;
- Evidence of collusion among the proposers submitting the proposals;
- Failure to comply with the specification requirements of the RFP.

Contract Requirements

The District plans to use the attached Pleasant Valley Recreation & Park District Professional Services Agreement. Consultants with significant concerns about the sample agreement should not submit on this RFP.

The top ranked firm will be notified in writing and will be asked to meet and submit their prospective scope of services and refine their fee (to be broken down by tasks). If after negotiation

and consideration, the District is unable to reach an acceptable agreement with the top-ranked firm, they will terminate negotiations with the top-ranked firm and, at their sole discretion, may: enter into negotiations with the second-ranked firm; withhold the award for any reason; elect not to proceed with any of the proponents; or re-solicit new Proposals.

Estimated Selection & Approval Schedule

Request for Proposals Open	July 7, 2022
Questions/Clarifications Due	July 25, 2022
Answers Provided by	July 29, 2022
Deadline for Proposals	August 5, 2022
Evaluation/Interview Consultant	August 8-19, 2022
Award of Contract	September 7, 2022
Start of Services	September 2022
Desired Project Close Out	(no later than) February 2023

**The District reserves the right to revise the above schedule.*

Questions

Upon release of this RFP, all Consultant communications concerning the RFP should be directed to Mary Otten, General Manager via the contact information listed below. Unauthorized contact regarding this RFP with any other District employees may result in disqualification. Any oral communications will be considered unofficial and non-binding with the District. Consultants should rely only on written statements by Ms. Otten.

Name: Mary Otten, General Manager
Address: Pleasant Valley Recreation & Park District
1605 E. Burnley Street, Camarillo, CA 93010
Email: motten@pvrpd.org

Submittal Instructions

Proposals must be received no later than 4:00 p.m. PDT on Friday, August 5, 2022. The proposals shall be in a sealed envelope or box and clearly labeled with the Consultant's name, address, and "Classification & Compensation RFP." An original and three (3) hard copies plus one electronic copy (on USB flash drive) of the proposal shall be submitted in a sealed envelope and must have the following information on the outside.

Proposals shall be mailed to:

Pleasant Valley Recreation & Park District

Attn: Mary Otten, General Manager

1605 E. Burnley Street

Camarillo, CA 93010

No amendments, additions or alterations will be accepted after the submission deadline. Late proposals will not be accepted. Proposal and documents submitted become the property the Pleasant Valley Recreation and Park District.

Attachment A – Professional Services Agreement

See Attachment

**PROFESSIONAL SERVICES AGREEMENT
BETWEEN THE PLEASANT VALLEY
RECREATION & PARK DISTRICT
AND
CONSULTANT, INC.**

This agreement is made and entered into, effective [REDACTED] between the PLEASANT VALLEY RECREATION AND PARK DISTRICT, a public agency (“District”), and [REDACTED], a California [REDACTED] (“Consultant”).

RECITALS

WHEREAS, following District’s Request for Proposal process, the District desires to contract with Consultant for certain professional planning services necessary for the development of an Open Space, Trail, and Greenway Planning Study (“Project”).

WHEREAS, Consultant represents that it has the qualifications and technical skills, experience and expertise to perform these services for the District.

NOW THEREFORE, based on the terms and conditions herein, the parties agree as follows:

1. Scope of Services

Consultant shall perform the professional services required to complete the Project for the District as described in the Scope of Work August 2017 attached as Exhibit “B” and incorporated by reference herein.

All work and services by Consultant shall be performed in a diligent and professional manner.

Consultant warrants that its services shall be performed, within the limits prescribed by the District, in a manner consistent with the level of care and skill ordinarily exercised by environmental, planning, and engineering professionals under similar circumstances at the time its services are performed. No other warranty or representation, express or implied, is included or intended by Consultant’s Proposal, this Agreement, or any reports or documents prepared herewithin.

Consultant agrees to undertake the discrete tasks outlined in Exhibit “B” only upon consultation with and authorization from the District’s General Manager and Park Superintendent.

As further described on Exhibit “B”, Consultant’s Services include:

1.

2.

3.

2. Term of Contract

Unless otherwise earlier terminated as specified in Section 9, this Agreement shall commence on the date set forth above and shall expire at completion of the Project no later than [REDACTED]. Consultant shall complete all work in accordance with the timelines set forth in the Proposal.

3. Force Majeure

The time period(s) specified in the Schedule of Performance for performance of the services rendered pursuant to this Agreement will be extended because of any delays due to unforeseeable causes beyond the control and without the fault or negligence of the Consultant, including, but not restricted to, acts of God or of the public enemy, unusually severe weather, fires, earthquakes, floods, epidemics, quarantine restrictions, riots, strikes, freight embargoes, wars, litigation, and/or acts of any governmental agency, including the District, if the Consultant shall, within ten (10) days of the commencement of such delay, notify the Project Manager in writing of the causes of the delay. The Project Manager shall ascertain the facts and the extent of delay and extend the time for performing the services for the period of the enforced delay when and if, in the judgment of the Project Manager, such delay is justified. The Project Manager's determination is final. In no event will Consultant be entitled to recover damages against the District for any delay in the performance of this Agreement, however caused; Consultant's sole remedy being extension of the Agreement pursuant to this Section.

4. Independent Contractor Relationship

- a. It is expressly understood between the parties that no employee/employer relationship is intended, the relationship of Consultant to District being that of an independent contractor. District shall not be required to make any payroll deductions or provide Workers' Compensation Insurance coverage or health benefits to Consultant.
- b. Consultant is solely responsible for selecting the means, methods and procedures for performing its services hereunder as assigned by the District and for coordinating all portions of the work so the results will be satisfactory to District. Consultant will supply all tools and instruments required to perform its services under this Agreement.

- c. Pursuant to this Agreement, Consultant is rendering professional services only and any payments made to it are compensation solely for such services as it may render and recommendations it may make in the performance of services.

5. Compliance with Laws

Consultant will be solely responsible for giving all notices and complying with any and all applicable laws, ordinances, rules, regulations and lawful orders of any public authority relating to Consultant's work, including but not limited to those relating to copyright, trademark or other intellectual property matters.

6. Licenses, Permits, Fees and Assessments.

Consultant shall obtain at its sole cost and expense, such licenses, permits and approvals as may be required by law for the performance of the services required by this Agreement. Consultant shall have the sole obligation to pay for any fees, assessments, taxes, including applicable penalties and interest, which may be imposed by law and arise from or are necessary for the Consultant's performance of the services required by this Agreement; and shall indemnify, defend and hold harmless District against any claim for such fees, assessments, taxes, penalties or interest levied, assessed or imposed against District hereunder.

7. Environmental Laws.

Consultant shall comply with all applicable environmental laws, ordinances, codes and regulations of Federal, State, and local governments. Consultant shall also comply with all applicable mandatory standards and policies relating to energy efficiency.

8. Acknowledgment of Relationship

Consultant agrees that all dealings of the parties under this Agreement shall be confidential, and writings, reports, data, information or communication developed, prepared or assembled by Consultant under this Agreement, or any information made available to Consultant by District, shall not be revealed, disseminated or made available by Consultant to any person or entity other than District without the prior written consent of District, unless otherwise required by subpoena or applicable law.

9. Payment to Consultant

- a. District shall pay Consultant monthly in proportion to the services performed plus reimbursable expenses and charges for additional services within thirty (30) days after receipt of Consultant's invoices in a form approved by District's, with the

exception of any disputed amounts which shall be withheld until resolution of the dispute. Payment terms are further described on Exhibit "C".

Total Project Cost not to Exceed: \$ _____

- b. No payment made under this Agreement shall be conclusive evidence of Consultant's performance of the Agreement, either wholly or in part, and no payment shall be construed to be an acceptance of Consultant's work.

10. Assistance by District

District agrees to provide to Consultant available information of relevance to Consultant's work, including all data and documents pertaining to the Project. District pledges to work cooperatively with Consultant and render all reasonable assistance toward completion of Consultant's work.

The District's Project Manager shall be Mary Otten, General Manager.

11. Ownership of Documentation

All maps, data, reports and other documentation (other than Consultant's drafts, notes and internal memoranda), including duplication of same prepared by Consultant in the performance of these services, shall become the property of the District and shall be retained by the Consultant for a period of three years after completion of the Project. If requested by the District, all, or the designated portions of such documentation, shall be delivered to the District.

12. Termination of Contract

Consultant specifically acknowledges and agrees that the District may at any time during the term of this Agreement terminate Consultant's services with or without cause, and without penalty, at the completion of any phase of Consultant's services as set forth in Exhibit "B." Any termination or any special instructions hereunder from District shall be made in writing. In the event this Agreement is terminated, all data, specifications, documents and information generated by Consultant in connection with the Project shall be delivered to District and may be used by District. Copies of these materials may be retained by Consultant.

13. Indemnification and Hold Harmless; Insurance Requirements

- a. Indemnity for Professional Liability. When the law establishes a professional standard of care for Consultant's services, to the fullest extent permitted by law, Consultant shall indemnify, defend and hold harmless District and its officers, employees, agents (the "District's Parties") from and

against any and all losses, liabilities, damages, costs and expenses, including attorneys' fees and costs to the extent same are caused in whole or in part by any negligent or wrongful act, error or omission of Consultant, its officers, agents, employees of subcontractors (or any entity or individual for which Consultant shall bear legal liability) in the performance of professional services under this Agreement.

b. Indemnity for Other Than Professional Liability. Other than in the performance of professional services and to the full extent permitted by law, Consultant shall indemnify, defend and hold harmless District and District's Parties from and against any liability (including liability for claims, suits, actions, losses, expenses or costs of any kind, whether actual, alleged or threatened, including attorneys' fees and costs, court costs, defense costs and expert witness fees), where the same arise out of, are a consequence of, or are in any way attributable to, in whole or in part, the performance of this Agreement by Consultant or by any individual or entity for which Consultant is legally liable, including but not limited to officers, agents, employees or subcontractors of Consultant.

c. Submission of insurance certificates or other proof of coverage shall not relieve Consultant from liability under this indemnification and hold harmless provisions. These provisions shall survive the termination of this Agreement and shall apply whether or not such insurance policies shall have been determined to be applicable to any of such damages or claims for damages.

d. Prior to the commencement of the Project, Consultant shall provide District with proof of the types and amounts of insurance described on Exhibit "A".

14. No Assignment

This Agreement is a personal services contract and work hereunder shall not be delegated or assigned by Consultant to any person or entity without the advance written consent of District. Consultant shall not employ any subcontractors for its work.

15. Examination of Records

Consultant agrees that District shall have access to and the right to examine at any reasonable time and on reasonable notice Consultant's documents, papers and records, including accounting records, relating to or involving this Agreement.

16. Notice

All notices or other official correspondence relating to contractual matters between the parties shall be made by depositing the same as first-class, postage paid mail addressed as follows:

To Consultant: _____

To District: PLEASANT VALLEY RECREATION & PARK DISTRICT
Attn: Mary Otten, General Manager
1605 E. Burnley Street
Camarillo, CA 93010

or such other address as either party may designate hereinafter in writing delivered to the other party. All notices shall be agreed to have been received three (3) days after mailing.

17. No Waiver

No failure or delay by District in asserting any of District’s rights and remedies as to any default of Consultant shall operate as a waiver of the default, of any subsequent or other default by Consultant, or of any of District’s rights or remedies. No such delay shall deprive District of its right to institute and maintain any actions or proceeding which may be necessary to protect, assert or enforce any rights or remedies arising out of this Agreement or the performance of this Agreement.

18. Partial Invalidity

If any term, covenant, condition, or provision of this Agreement is found by a court of competent jurisdiction to be invalid, void, or unenforceable, the remainder of the provisions hereof shall remain in full force and effect, and shall in no way be affected, impaired, or invalidated thereby.

19. Terms

No alteration or variation of the terms of this Agreement shall be valid unless made in writing and signed by the parties. No oral understanding or agreement not incorporated herein shall be binding on any of the parties.

20. Incorporation of Recitals

The foregoing recitals are incorporated herein as though fully set forth.

21. California Law

This Agreement shall be interpreted and construed pursuant to the laws of the State of California. Any dispute between the parties shall be filed and heard in a court of competent jurisdiction in the County of Ventura, State of California.

22. Additional Provisions

Consultant agrees that no full time employee of District shall be employed by its firm during the period that this Agreement is in effect.

23. Attorneys' Fees.

If either party to this Agreement is required to initiate or defend or made a party to any action or proceeding in any way connected with this Agreement, the prevailing party in such action or proceeding, in addition to any other relief which may be granted, shall be entitled to reasonable attorneys' fees, whether or not the matter proceeds to judgment, and to all other reasonable costs for investigating such action, taking depositions and discovery, including all other necessary costs the court allows which are incurred in such litigation.

24. Conflict of Interest.

Consultant warrants that it has not paid or given and will not pay or give any third party any money or other consideration for obtaining this Agreement. Consultant shall comply with all conflict of interest laws and regulations.

25. Interpretation.

The terms of this Agreement shall be construed in accordance with the meaning of the language used and shall not be construed for or against either party by reason of the authorship of this Agreement or any other rule of construction which might otherwise apply.

26. Corporate Authority.

The persons executing this Agreement on behalf of the parties hereto warrant that (i) such party is duly organized and existing, (ii) they are duly authorized to execute and deliver this Agreement on behalf of said party, (iii) by so executing this Agreement, such party is formally bound to the provisions of this Agreement, and (iv) the entering into this Agreement does not violate any provision of any other Agreement to which said party is bound.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement the day and year first above written.

DISTRICT:
PLEASANT VALLEY RECREATION &
PARK DISTRICT

By: _____
Mary Otten, General Manager

ATTEST:

INSERT

CONSULTANT:
XXXX, a California corporation &
PARK DISTRICT

By: _____
Name: _____
Its: _____

By: _____
Name: _____
Its: _____

EXHIBIT "A"

**PLEASANT VALLEY RECREATION & PARK DISTRICT
INSURANCE REQUIREMENTS**

Consultant shall procure and maintain for the duration of the Agreement (and thereafter as specified herein) insurance against claims for injuries to persons or damage to property which may arise from or in connection with the performance of the work hereunder by Consultant, his agents, representatives, employees or subcontractors.

MINIMUM SCOPE OF INSURANCE

Coverage shall be at least as broad as:

1. Insurance Services Office Commercial General Liability coverage (occurrence form CG 00 01).
2. Insurance Services Office form number CA 00 01 covering Automobile Liability, Code 1 (any auto).
3. Workers' Compensation insurance as required by the State of California and Employer's Liability Insurance.

MINIMUM LIMITS OF INSURANCE

Consultant shall maintain limits no less than:

1. General Liability (Including operations, products and completed operations, as applicable): \$1,000,000 per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to this project/location or the general aggregate limit shall be twice the required occurrence limit.
2. Automobile Liability: \$1,000,000 per accident for bodily injury and property damage.
3. Employer's Liability: \$1,000,000 per accident for bodily injury or disease.
4. Errors and Omissions Liability: A policy of professional liability insurance in an amount not less than \$1,000,000 per occurrence.

5. Contractors Pollution Liability: N/A
6. Asbestos Pollution Liability: N/A

DEDUCTIBLES AND SELF-INSURED RETENTION

Any deductibles or self-insured retentions must be declared to and approved by the District. At the option of the District, either (1) the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects the District and its directors, officers, employees, agents and volunteers (collectively "District Parties"), or (2) Consultant shall provide a financial guarantee satisfactory to the District guaranteeing payment of losses and related investigations, claim administration and defense expenses.

OTHER INSURANCE PROVISIONS`

The commercial general liability and automobile liability policies are to contain, or be endorsed to contain, the following provisions:

1. The District and District Parties are to be covered as insured's as respects: liability arising out of work or operations performed by or on behalf of the Architect; or automobiles owned, leased, hired or borrowed by Consultant.
2. For any claims related to this Agreement, Consultant's insurance coverage shall be primary insurance as respects the District and District Parties. Any insurance or self-insurance maintained by the District and District Parties shall be excess of the Consultant's insurance and shall not contribute with it.
3. Each insurance policy required by this clause shall be endorsed to state that coverage shall not be canceled by either party, except after thirty (30) day's prior written notice has been provided to the District.

If General Liability, Contractors Pollution Liability and/or Asbestos Pollution Liability and/or Errors & Omissions coverage's are written on a claims-made form:

1. The retroactive date must be shown, and must be before the date of this Agreement or the beginning of work on the Project.
2. Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after completion of the contract of the Project.
3. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a retroactive date prior to the Agreement

effective date, Consultant must purchase an extended period coverage for a minimum of five (5) years after completion of the Project.

4. A copy of the claims reporting requirements must be submitted to the District for review and approval.

ACCEPTABILITY OF INSURERS

Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A: VII, unless otherwise acceptable to the District. Exception may be made for the State Compensation Insurance Fund when not specifically rated.

VERIFICATION OF COVERAGE

Consultant shall furnish the District with original certificates and amendatory endorsements effecting coverage required by this clause. The endorsements should be on forms provided by the District, or on other than the District's forms provided those endorsements conform to District requirements and are acceptable to the District. All certificates and endorsements are to be received and approved by the District before work commences. However, failure to do so shall not operate as a waiver of these insurance requirements. The District reserves the right to require complete, certified copies of all required insurance policies, including endorsements affecting the coverage required by these specifications at any time.

SUB-CONTRACTORS

Consultant shall include all subcontractors as insured's under its policies or shall furnish separate certificates and endorsements for each subcontractor. All coverage's for subcontractor shall be subject to all of the requirements stated herein.

END OF PAGE

EXHIBIT "B"
SCOPE OF WORK

DRAFT

EXHIBIT "C"
COMPENSATION

DRAFT

**PLEASANT VALLEY RECREATION AND PARK DISTRICT
STAFF REPORT / AGENDA REPORT**

TO: BOARD OF DIRECTORS

FROM: MARY OTTEN, GENERAL MANAGER
By: Katlyn Simber-Clickener, Recreation Services Manager

DATE: July 6, 2022

**SUBJECT: CONSIDERATION AND ADOPTION OF
RESOLUTION NO. 715 DECLARING JULY AS
PARK AND RECREATION MONTH**

SUMMARY

The month of July is recognized as National Park and Recreation Month. Each year, the Board has chosen to recognize the value and importance of recreation and parks as a cornerstone to the health and wellness of residents.

BACKGROUND

Americans have celebrated National Park and Recreation Month during July since 1985. Through efforts of the National Recreation and Park Association (“NRPA”), the U.S. House of Representatives passed an official resolution for Park and Recreation Month in 2009. At the state level, California Parks and Recreation Society (“CPRS”) recognizes it as “July is Parks Make Life Better” month. NRPA and CPRS encourage its members to plan events and initiatives that will remind the community of the exciting and vital role that recreation and parks play in our lives. Staff is presenting a resolution proclaiming the month of July as Park and Recreation Month. Resolution No. 715 not only recognizes the need for parks and recreation but also draws attention to the District’s goals of furthering health, wellness, conservation, and social opportunities by providing equitable programs and events.

ANALYSIS

Each summer, staff partners with local organizations, contract instructors, and non-profits to produce community wide events, including a Movies in the Park series, a Summer Concert Series, a Bingo Bash, camps, classes, and Habitat Conservation Fund programs.

FISCAL IMPACT

There is no fiscal impact associated with this action.

STRATEGIC PLAN COMPLIANCE

Meets 2021 Strategic Plan Goal 4.4: Enhance community connections by fostering collaborative partnerships that leverage strengths and resources to enrich the recreation experience.

RECOMMENDATION

It is recommended the Board consider and adopt Resolution No. 715 proclaiming July as Park and Recreation Month.

ATTACHMENTS

- 1) Resolution No. 715 (1 page)

RESOLUTION NO. 715

**RESOLUTION OF THE BOARD OF DIRECTORS OF THE
PLEASANT VALLEY RECREATION & PARK DISTRICT
TO PROCLAIM JULY AS PARK AND RECREATION MONTH**

WHEREAS parks and recreation programs are an integral part of communities throughout this country, including the Pleasant Valley Recreation & Park District in Camarillo; and

WHEREAS our parks and recreation are vitally important to establishing and maintaining the quality of life in our communities, ensuring the health of all citizens, and contributing to the economic and environmental well-being of a community and region; and

WHEREAS parks and recreation programs build healthy, active communities that aid in the prevention of chronic disease, provide therapeutic recreation services for those who are mentally or physically disabled and improve the mental and emotional health of all citizens; and

WHEREAS parks and recreation programs increase a community's economic prosperity through increased property values, expansion of the local tax base, increased tourism, the attraction and retention of businesses, and crime reduction; and

WHEREAS our parks and natural recreation areas ensure the ecological beauty of our community and provide a place for children and adults to connect with nature and recreate outdoors; and

WHEREAS the U.S. House of Representatives has designated July as Park and Recreation Month; and

WHEREAS Pleasant Valley Recreation & Park District recognizes the benefits derived from parks and recreation resources

THEREFORE, BE IT RESOLVED the Pleasant Valley Recreation & Park District hereby proclaims the month of July as "Park & Recreation Month" and in doing so, urges all citizens in the community of Camarillo to use and enjoy our parks and recreational opportunities.

PASSED AND ADOPTED by the Board of Directors of Pleasant Valley Recreation & Park District this 6th day of July 2022, by the following vote:

AYES: _____

NAYS: _____

ABSENT: _____

Robert Kelley, Chair, PVRPD Board of Directors

ATTESTED:

Bev Dransfeldt, Secretary, PVRPD Board of Directors

**PLEASANT VALLEY RECREATION AND PARK DISTRICT
STAFF REPORT / AGENDA REPORT**

TO: BOARD OF DIRECTORS

FROM: MARY OTTEN, GENERAL MANAGER

DATE: July 6, 2022

SUBJECT: CONSIDERATION AND ADOPTION OF RESOLUTION NO. 716 PROCLAIMING A LOCAL EMERGENCY PERSISTS AND RE-AUTHORIZING THE USE OF REMOTE TELECONFERENCE MEETING PROCEDURES BY THE BOARD OF DIRECTORS AND ALL STANDING COMMITTEES OF THE DISTRICT FOR THE 30-DAY PERIOD BEGINNING JULY 6th, 2022 THROUGH AUGUST 5th, 2022 PURSUANT TO THE RALPH M. BROWN ACT AS AMENDED BY ASSEMBLY BILL NO. 361

BACKGROUND

In March 2020, the Governor, on behalf of the State of California, issued various executive orders which relaxed requirements under the Ralph M. Brown Act (Brown Act) allowing public agencies the flexibility to successfully continue conducting public meetings during the COVID-19 pandemic. On September 30, 2021, the State rescinded those orders. However, in lieu of the rescinded executive orders, the State passed Assembly Bill 361 (AB 361) which modified the Brown Act and provides essentially the same flexibility for conducting public meetings during a declared emergency until January 1, 2024. As a result, in accordance with the requirements of AB 361, local agencies must continue to adopt a resolution every 30 days to use the modified public meeting provisions provided for in AB 361.

On September 16, 2021, Governor Newsom signed Assembly Bill 361 (“AB 361”) into law. AB 361 was made effective on October 1, 2021, on an urgency basis, to correspond to the timing of expiration of the Brown Act Orders. AB 361 provides for the ability to continue teleconferencing Brown Act meetings of city legislative bodies for public health and safety reasons under certain conditions, akin to the authority to do so under the Brown Act Orders.

ANALYSIS

In accordance with AB 361, if a local agency passes a resolution that makes the necessary findings, the agency is allowed to follow the provisions of AB 361 for a maximum period of 30 days. After the first 30-day period, AB 361 requires the public agency to adopt a resolution no later than once every 30-days to continue meeting under the modified Brown Act requirements.

On February 3, 2022, the District Board adopted Resolution No. 699 authorizing the continuation of the use of remote teleconference meetings under the provision of Government Code Section 54953.

The resolution is effective for a 30-day period and must be renewed every 30 days. On March 2, 2022, the District Board adopted Resolution No. 701 authorizing the continuation of the use of remote teleconference meetings under the provision of Government Code Section 54953. The resolution is effective for a 30-day period and must be renewed every 30 days. On April 6, 2022, the District Board adopted Resolution No. 704 authorizing the continuation of the use of remote teleconference meetings under the provision of Government Code Section 54953. On May 4, 2022, the District Board adopted Resolution No. 709 authorizing the continuation of the use of remote teleconference meetings under the provision of Government Code Section 54953. The resolution is effective for a 30-day period and must be renewed every 30 days. On June 1, 2022 the District Board adopted Resolution No. 711 authorizing the continuation of the use of remote teleconference meetings under the provision of Government Code Section 54953. The resolution is effective for a 30-day period and must be renewed every 30 days.

The other major change is that all public agencies, if they want to continue to conduct public meetings remotely, must adopt a resolution every 30 days making the findings of necessity to do so and affirming the measures in place to allow remote public comments by the public.

If a state of emergency remains active, or state or local officials have imposed or recommended measures to promote social distancing, AB 361 imposes certain requirements to continue use of its provisions after the initial 30-day period, or a 30-day period, thereafter, has elapsed.

Government Code section 54953(e)(3) provides that “not later than 30 days after teleconferencing for the first time pursuant” to AB 361, “and every 30 days thereafter,” the public agency shall make the following findings by majority vote for the agency to continue using the teleconferencing provisions of AB 361:

1. The public agency has reconsidered the circumstances of the state of emergency; *and*
2. Either of the following circumstances exist:
 - a. The state of emergency continues to directly impact the ability of the members to meet safely in person, *or*
 - b. State or local officials continue to impose or recommend measures to promote social distancing.

These provisions of AB 361 are effective until January 1, 2024. This means these provisions may be invoked any time there is a proclaimed state of emergency by the Governor (e.g., wildfires) and the District Board can make at least one of the enumerated findings.

Accordingly, if the Board would like to continue conducting public meetings under the modified Brown Act provisions, staff has prepared the attached resolution for Board consideration and adoption.

RECOMMENDATION

Adopt Resolution No. 716 proclaiming a local emergency persists and re-authorizing the use of remote teleconference meeting procedures by the Board of Directors and all standing committees of the District for the 30-day period beginning July 6th, 2022 through August 5th, 2022 pursuant to the Ralph M. Brown Act as amended by Assembly Bill No. 361.

ATTACHMENT

- 1) Resolution No. 716 (3 pages)

RESOLUTION NO. 716

A RESOLUTION OF THE BOARD OF DIRECTORS OF THE PLEASANT VALLEY RECREATION AND PARK DISTRICT PROCLAIMING A LOCAL EMERGENCY PERSISTS AND RE-AUTHORIZING THE USE OF REMOTE TELECONFERENCE MEETING PROCEDURES BY THE BOARD OF DIRECTORS AND ALL STANDING COMMITTEES OF THE DISTRICT FOR THE 30-DAY PERIOD BEGINNING JULY 6th, 2022 THROUGH AUGUST 5th, 2022 PURSUANT TO THE RALPH M. BROWN ACT AS AMENDED BY ASSEMBLY BILL NO. 361

WHEREAS, the Pleasant Valley Recreation and Park District (“District”) is committed to preserving and fostering public access, transparency, observation, and participation in meetings of the Board of Directors (“Board”) and all standing committees; and

WHEREAS, all meetings of the Board and standing committees are open and public, as required by the Ralph M. Brown Act, Government Code sections 54950 – 54963, so that any member of the public may attend, observe, and participate in a meaningful way; and

WHEREAS, the Brown Act, as amended by AB 361 (2021), at Government Code section 54953(e) *et seq.*, allows for remote observation and participation in meetings by members of a legislative body and members of the public, without compliance with the requirements of Government Code section 54953(b)(3), subject to the existence of certain conditions; and

WHEREAS, the initial required condition is a declaration of a state of emergency by the Governor pursuant to the California Emergency Services Act at Government Code section 8625, proclaiming the existence of conditions of disaster or of extreme peril to the safety of persons and property within the state and within the boundaries of the District, caused by conditions as described in Government Code section 8558; and

WHEREAS, such conditions now exist in the District specifically, a state of emergency was proclaimed, which includes area within the jurisdictional boundaries of the District, on or about March 4, 2020, by California Governor Gavin Newsom in response to the COVID-19 novel coronavirus pandemic, including measures to mitigate the spread of COVID-19 in order to control outbreaks which minimizes the risk to the public, maintains the health and safety of the people of California, and limits the spread of infection in our communities; and

WHEREAS, the Board of Directors does hereby find the Ventura County Public Health Officer has recommended that physical/social distancing measures continue to be practiced throughout Ventura County communities to minimize the spread of COVID-19; and

WHEREAS, the District remains committed to providing the public with real-time access to attend and participate in remotely held District meetings through a variety of

options including through the internet via Zoom, telephonically, via email correspondence prior to the meeting, and through livestream video via the District's YouTube channel, in an effort to protect the constitutional and statutory rights of all attendees; and

WHEREAS, as a consequence of the local emergency existing, the Board hereby finds that the Board and all standing committees of the Pleasant Valley Recreation and Park District shall conduct their meetings without compliance with Government Code section 54953(b)(3), and shall instead comply with the remote meeting requirements as authorized by Government Code section 54953(e) *et seq.*; and

WHEREAS, continued reliance on AB 361 for subsequent meetings requires the following:

1. Either the "state of emergency" must remain active or state or local officials have imposed or recommended measures to promote social distancing; and
2. No later than 30 days after teleconferencing for the first time under AB 361 rules, and every 30 days thereafter, the legislative body, by majority vote, finds that it has reconsidered the circumstances of the state of emergency and at least one of the following circumstances exist:
 - a. The state of emergency continues to impact the ability of the members to meet safely in person; or
 - b. State or local officials continue to impose recommended measures to promote social distancing.

NOW, THEREFORE, THE BOARD OF DIRECTORS OF PLEASANT VALLEY RECREATION AND PARK DISTRICT HEREBY RESOLVES AS FOLLOWS:

Section 1. The above recitals are true and correct and are incorporated herein by this reference.

Section 2. The Board of Directors hereby recognizes and affirms the existence and conditions of a state of emergency as proclaimed by the Governor on March 4, 2020 and recognizes that the Ventura County Public Health Officer has recommended physical and social distancing measures to be practiced throughout Ventura County communities to minimize the spread of COVID-19. Based on such facts, findings and determinations, the District proclaims the existence of a local emergency throughout the District and authorizes staff to conduct remote teleconference meetings of the Board of Directors, including committee meetings, under the provisions of Government Code Section 54953(e).

Section 3. The General Manager is authorized and directed to take all actions reasonably necessary to carry out the intent and purpose of this Resolution, including conducting open and public meetings remotely in accordance with Government Code section 54953(e) *et seq.*, and other applicable provisions of the Brown Act, for all Board meetings, and all standing committee meetings of the District.

Section 4. As respects continued reliance on AB 361 for subsequent meetings, this Resolution takes into consideration that the state of emergency still persists which can impact the ability of board members to meet safely in person and re-authorizes the remote teleconferencing procedures for another 30 days.

Section 5. This Resolution shall take effect immediately upon its adoption and shall be effective until either (i) 11:59 p.m. on August 5th, 2022, or (ii) such time as the Board of Directors adopts a subsequent resolution in accordance with Government Code section 54953(e)(3) to extend the time during which the Pleasant Valley Recreation and Park District and all standing committees of the District may continue to meet remotely, without compliance with Government Code section 54953(b)(3), but otherwise as permitted by Government Code section 54953(e) *et seq.*

I HEREBY CERTIFY that the foregoing Resolution was passed and adopted by the Board of Directors of the Pleasant Valley Recreation and Park District at a regular meeting held on the 6th day of July 2022, by the following vote:

AYES: _____

NOES: _____

ABSENT: _____

ABSTAIN: _____

Robert Kelley, Chair, Board of Directors
PLEASANT VALLEY RECREATION
AND PARK DISTRICT

Attested:

Bev Dransfeldt, Secretary, Board of Directors
PLEASANT VALLEY RECREATION
AND PARK DISTRICT

**PLEASANT VALLEY RECREATION AND PARK DISTRICT
STAFF REPORT / AGENDA REPORT**

TO: BOARD OF DIRECTORS

FROM: MARY OTTEN, GENERAL MANAGER
By: Leonore Young, Administrative Services Manager

DATE: July 6, 2022

**SUBJECT: CONSIDERATION AND APPROVAL OF RESOLUTION
NO. 717 FOR FISCAL YEAR 2022-2023 BUDGETS FOR
THE GENERAL FUND, THE ASSESSMENT DISTRICT,
QUIMBY FEE FUND, PARK IMPACT FEE FUND AND
COMMUNITY DEVELOPMENT BLOCK GRANT FUND**

SUMMARY

Every year a public hearing is held to adopt the proposed Fiscal Year budget for the General Fund, Assessment District, Quimby Fee Fund, Park Impact Fee Fund and Community Development Block Grant Fund budgets. The hearing is required before the District can adopt a resolution to adopt the Fiscal Year budget 2022-2023. Staff is requesting that the Board adopt the FY 2022-2023 General Fund, Assessment District, Quimby Fee Fund, Park Impact Fee Fund and Community Development Block Grant Fund budgets for the Pleasant Valley Recreation and Park District.

BACKGROUND

On April 23rd and May 10th, 2022, Pleasant Valley Recreation and Park District held public workshops for the proposed Fiscal Year 2022-2023 budgets. The fiscal year budgets being presented to the Board reflects \$19,855 in revenue over expenses for the General Fund with revenue at \$8,941,311 and expenses at \$8,923,456 and capital improvement projects of \$862,500. The Assessment District shows revenue over expenses of \$28,322 with revenue at \$1,251,631 and expenses at \$1,223,309. The Quimby Funds have limited revenue of \$5,125 and does not budget for Park Dedication Fees as those are not guaranteed revenue. The Quimby Funds do show a capital improvement project totaling \$1,400,000 for the fiscal year. This project, a Pickleball Sports Complex started in FY21-22 and will carry over into FY22-23. Park Impact Fees has limited revenue of \$66 and no expenses. The Community Development Block Grant Fund has revenue of \$42,428 and expenses of \$39,841, which makes revenue over expenses by \$2,587. The public received notice of these workshops through the posting of agendas.

At the end of the workshops, the proposed budgets were presented and approved by the Board at the June 1, 2022 Board Meeting as required by Public Resources Code 5788. Also, per Public Resources Code 5785.1(b), the notice of a public hearing was posted on June 18, 2022 in the *Camarillo Acorn*. The notice served to announce the public hearing on the adoption of the final budget at the July 6th, 2022 meeting. The Board has until August 30, 2022 to adopt a final budget as required by Public Resource Code 5788.5.

The proposed operating budgets for FY 2022-2023 strive to continue to move the Pleasant Valley Recreation and Park District along the path of fiscal sustainability, including but not limited to

recovery from the COVID-19 pandemic which began in March 2020 and is still ongoing, but not restrictive, yet the District is still experiencing fall-out from the pandemic.

During the budget wrap-up on May 10th, staff was asked if Quimby Funds could be used for the Freedom Dog Park project that is in the FY22-23. The dog park project is budgeted in Fund 10 Capital. The District’s legal counsel was still reviewing our question at the time of the June 1st Board meeting therefore staff was not able to provide the Board with a final answer. Staff recently received guidance that it would be relatively safe to use the Quimby fees for the dog park.

The staff report for the Fairfield Quimby findings specifies that the fees should be used towards specific remaining projects: for the Senior/Community Facility Project, Community Center Classroom and Auditorium enhancements, Camarillo Grove Nature Center, as well as projects within the Freedom Park Master Plan. The resolution states that the Board allocated any and all fees received in lieu of land for Fairfield LLC’s subdivision for the purpose of completing projects which develop new recreational features and expand user capacity within the Freedom Park Master Plan. As such, the inclusion of a dog park within Freedom Park would likely be consistent with the resolution as funds would be used on developing a new recreational feature, the dog park, which would expand user capacity within the park.

Even though legal counsel stated the District could use Fund 30 (Quimby Fund) to pay for the Freedom Dog Park project, the project remained budgeted in Fund 10 (General Fund) Capital per the Board of Directors vote on the approval of the proposed FY22-23 budget at the June 1, 2022 Board meeting.

A central component of this budget is to develop a balanced spending plan that factors in salary and benefit expenses, identifying essential service needs, technological demands, changing legislation and regulations, and infrastructure maintenance issues. The General Fund budget as presented is balanced with an excess of \$19,855 in the general fund. The introduction of the budgets as well as the workshops has allowed the Board and the public an opportunity to review and provide additional comments before adoption of the budgets on July 6, 2022.

The Assessment District budget is balanced at \$1,251,631 in revenue with \$1,223,309 in personnel and services and supplies expense. This equates to revenue exceeding expense by a total of \$28,322.

The Quimby Fees Funds has a revenue budget of \$5,125 for interest earnings and an expense budget of \$1,400,000 for capital improvement projects.

Park Impact Fees has a revenue budget of \$66 for interest earnings and no personnel or services and supplies expense.

The Community Development Block Grant (CDBG) has revenue budgeted at \$42,428 with personnel expense at \$39,841 and no budget for services and supplies.

ANALYSIS

The analysis is comparative with the approved FY 2021-2022 Operating Budget for General Fund-Fund 10, Assessment District - Fund 20, Quimby Fees – Fund 30, Park Impact Fees – Fund 40 and Community Development Block Grant – Fund 50.

FUND 10

General Fund Revenue has an overall increase from prior year of \$107,537. Major changes to the Revenue are:

Revenue – Fund 10

Account Name	Action	Amount of Change from Prior Year
Property Tax Apportionment	Increase	\$332,425
Public Fees	Increase	\$ 99,230
Misc Revenue	Decrease	\$271,480
ROPS	Decrease	\$125,000

General Fund Personnel has an overall increase from prior year of \$217,001. Major changes to Personnel are:

Personnel – Fund 10

Account Name	Action	Amount of Change from Prior Year
Workers Compensation	Increase	\$ 33,659
PERS Unfunded Liability	Increase	\$ 49,024
Part-Time Salaries	Increase	\$ 79,775
Full-Time Salaries	Increase	\$165,200
Unemployment Insurance	Decrease	\$ 25,000
Loan – Pension Obligation	Decrease	\$131,325

The Changes to Personnel are:

- 2% COLA for Full-Time Wages
- 2 Full Time Positions
 - Accounting Specialist
 - Mechanic
- Decrease in Loan – Pension Obligation
 - Final Payment August 2022

General Fund Services and Supplies has an overall increase from prior year of \$149,039. Major changes to Services and Supplies are:

Services and Supplies – Fund 10

Account Name	Action	Amount of Change from Prior Year
Insurance Liability	Increase	\$47,340

Computer Hardware/Software	Increase	\$ 48,484
Professional Services	Increase	\$ 65,951
Bank Charges/Fees	Decrease	(\$43,812)

General Fund Capital Improvement Projects (CIP) has an overall increase from prior year of \$125,200. The Capital Improvement Projects for FY2022-2023 are:

Capital Improvement Projects – Fund 10

Project Name	Budgeted Cost
Senior Center Roof	\$100,000
Mission Oaks Tennis Court	\$130,000
Community Center Sewer Lines	\$125,000
CO-OP Sewer Lines	\$ 60,000
Fleet Vehicle Hybrid (Ranger)	\$ 35,000
Turf Mitigation	\$ 30,000
Utility Tractor/Stump Grinder/Trencher	\$ 55,000
Septic System – Cam Grove Park	\$120,000
Lifeguard Tower	\$ 7,500
Freedom Dog Park	\$200,000

FUND 20

Type	FY21-22	FY22-23	Budget Change
Revenue	\$1,209,804	\$1,251,631	\$41,827
Personnel	\$ 30,809	\$ 31,984	\$ 1,175
Services and Supplies	\$1,129,337	\$1,191,325	\$61,988
Over/(Under) Revenue	\$ 49,658	\$ 28,322	(\$21,336)

Fund 20 - Assessment District

The analysis for Fund 20 (Assessment District) is as follows:

- No changes from April 23rd Budget Workshop or May 10th Budget Wrap-Up
- Balanced budget with an excess of \$28,322
- Revenue has increased \$41,827 due to 3.0% increase in Assessment Tax
- Personnel has increased \$1,175
- Services and Supplies has increased \$61,988

FUND 30

Fund 30 – Quimby Fees

Fund 30 (Quimby Fees) is a fee that is received from developers in lieu of land and may only be used for developing new parks/recreation facilities or rehabilitating existing neighborhood or Community Park/Recreational Facilities. The District does not budget for Park In-Lieu Fees but does budget for interest earnings. The District budgeted \$5,125 in interest earnings, taking into consideration the balances that are in the Ventura County Pool and Pacific Western Bank.

The below listed projects are carry-over Quimby projects from FY21-22 and will continue into the FY22-23 budget.

Project Name	Budget	Amount Expensed FY21-22	Balance Available
Pickleball Sport Complex	\$1,400,000	\$6,188	\$1,393,812

FUND 40

Fund 40 – Park Impact Fees

Fund 40 (Park Impact Fees) was established in September 2021 for new non-subdivision residential developments and new or expanded non-residential development. The fees can be used for new facilities or expanded facilities within existing parks. The fees cannot be used to fund parkland acquisitions or the new renovation of existing facilities that do not add new service capacity. The District does not budget for Park Impact Fees but does budget for interest earnings. The District budgeted \$66 in interest earnings, taking into consideration the balances that are in the Pacific Western Bank account.

Account Type	Budgeted Amount
Revenue	\$66
Expenses	\$0

FUND 50

Fund 50 – Community Development Block Grant (CDBG)

Fund 50 (Community Development Block Grant) is a grant to help the District cover the cost to continue with a food distribution program that has been in existence since 2014. This food distribution is called Food Share and is a year-round program. The District budgets for revenue (grant) and personnel expenses.

Account Type	Budgeted Amount
Revenue	\$42,428
Personnel	\$39,841
Services and Supplies	\$0

FISCAL IMPACT

No changes have been made to the FY 22-23 budget since the June 1, 2022 budget approval. There is no fiscal impact with this budget.

STRATEGIC PLAN COMPLIANCE

Meets 2021 Strategic Plan Goal 1.2: Utilize best accounting practices and forecast and optimize revenue while controlling expenditures.

RECOMMENDATION

It is recommended that the Board of Directors adopt Resolution No. 717 to adopt the Fiscal Year 2022-2023 Budgets.

ATTACHMENT

- 1) FY 2022-2023 Budgets Summary Sheets
 - a. Fund 10 (3 pages)
 - b. Recreation Department (2 pages)
 - c. Department 000 (1 page)
 - d. Department 301 (1 page)
 - e. Department 310 (1 page)
 - f. Department 320 (1 page)
 - g. Department 370 (1 page)
 - h. Department 410 (2 pages)
 - i. Department 503 (1 page)
 - j. Department 505 (2 pages)
 - k. Department 520 (1 page)
 - l. Fund 20 Assessment District (1 page)
 - m. Fund 30 Park Dedication Fees (1 page)
 - n. Fund 40 Park Impact Fee (1 page)
 - o. Fund 50 Community Development Block Grant (1 page)
- 2) Resolution No. 717 (1 page)

Pleasant Valley Recreation & Park District
FY 2022-2023 Budget
Fund 10

Account	Description	Two Year Prior Actual	One Year Prior Budget	Requested	Proposed	Approved	Adopted
Revenue							
5110	Tax Apport - Cur Year Secured	\$ (6,982,262.02)	\$ (7,301,920.00)	\$ (7,634,345.00)	\$ (7,634,345.00)	\$ (7,634,345.00)	\$ (7,634,345.00)
5120	Tax Apport - Cur Year Unsec	\$ (121,378.02)	\$ -	\$ -	\$ -	\$ -	\$ -
5130	Tax Apport - Prior Year Sec	\$ (111,169.16)	\$ -	\$ -	\$ -	\$ -	\$ -
5140	Tax Apport - Prior Year Unsec	\$ (6,238.93)	\$ -	\$ -	\$ -	\$ -	\$ -
5150	Tax Deeded Sales	\$ (4.49)	\$ -	\$ -	\$ -	\$ -	\$ -
5210	Cur Supplemental Pass Thru	\$ (107,826.47)	\$ -	\$ -	\$ -	\$ -	\$ -
5230	HOPTR	\$ (38,108.95)	\$ -	\$ -	\$ -	\$ -	\$ -
5240	Supplemental Assessment Roll	\$ (164.35)	\$ -	\$ -	\$ -	\$ -	\$ -
5310	Interest Earnings	\$ (31,025.82)	\$ (14,928.00)	\$ (9,893.00)	\$ (9,893.00)	\$ (9,893.00)	\$ (9,893.00)
5465	Hill Fire 2018	\$ (219,884.01)	\$ -	\$ -	\$ -	\$ -	\$ -
5506	Park Patrol Citations	\$ (1,100.00)	\$ (2,200.00)	\$ (1,500.00)	\$ (1,500.00)	\$ (1,500.00)	\$ (1,500.00)
5508	Bingo Revenue	\$ (2,736.25)	\$ (14,400.00)	\$ (14,400.00)	\$ (14,400.00)	\$ (14,400.00)	\$ (14,400.00)
5510	Contract Classes-Public Fees	\$ (130,639.25)	\$ (128,380.00)	\$ (131,313.00)	\$ (131,313.00)	\$ (131,313.00)	\$ (131,313.00)
5511	Public Fees	\$ (84,817.19)	\$ (200,771.00)	\$ (300,001.00)	\$ (300,001.00)	\$ (300,001.00)	\$ (300,001.00)
5520	Public Fees-Entry Fees	\$ (10,764.00)	\$ (25,840.00)	\$ (25,840.00)	\$ (25,840.00)	\$ (25,840.00)	\$ (25,840.00)
5525	Vending Concessions	\$ -	\$ (2,500.00)	\$ (1,450.00)	\$ (1,450.00)	\$ (1,450.00)	\$ (1,450.00)
5530	Rental	\$ (266,802.32)	\$ (285,912.00)	\$ (338,717.00)	\$ (338,717.00)	\$ (338,717.00)	\$ (338,717.00)
5535	Cell Tower Revenue	\$ (97,895.88)	\$ (91,704.00)	\$ (100,800.00)	\$ (100,800.00)	\$ (100,800.00)	\$ (100,800.00)
5540	Parking Fees	\$ (11,345.60)	\$ (8,512.00)	\$ (9,600.00)	\$ (9,600.00)	\$ (9,600.00)	\$ (9,600.00)
5555	Activity Guide Revenue	\$ (1,750.00)	\$ (10,000.00)	\$ (10,000.00)	\$ (10,000.00)	\$ (10,000.00)	\$ (10,000.00)
5558	Sponsorships/Donations	\$ (4,065.00)	\$ (1,000.00)	\$ -	\$ -	\$ -	\$ -
5563	Staffing Cost Recovery	\$ (33,263.00)	\$ (26,730.00)	\$ (58,352.00)	\$ (58,352.00)	\$ (58,352.00)	\$ (58,352.00)
5564	Special Event Permits	\$ (600.00)	\$ -	\$ -	\$ -	\$ -	\$ -
5570	Contributions	\$ (41,239.00)	\$ (72,000.00)	\$ (72,000.00)	\$ (72,000.00)	\$ (72,000.00)	\$ (72,000.00)
5573	Grants	\$ (7,176.00)	\$ -	\$ -	\$ -	\$ -	\$ -
5575	Other Misc Revenue	\$ (37,621.62)	\$ (304,880.00)	\$ (33,400.00)	\$ (33,400.00)	\$ (33,400.00)	\$ (33,400.00)
5576	Credit Card Processing Fee	\$ (172.84)	\$ -	\$ -	\$ -	\$ -	\$ -
5580	Cash Over/Under	\$ (166.00)	\$ -	\$ -	\$ -	\$ -	\$ -
5585	Incentive Income	\$ (1,091.35)	\$ (2,700.00)	\$ (1,700.00)	\$ (1,700.00)	\$ (1,700.00)	\$ (1,700.00)
5600	Reimbursement - ROPS	\$ (373,105.94)	\$ (325,000.00)	\$ (200,000.00)	\$ (200,000.00)	\$ (200,000.00)	\$ (200,000.00)
5605	Reimb-Needs Assessment/LPA	\$ (17,610.38)	\$ -	\$ -	\$ -	\$ -	\$ -
5991	Surplus Carryover	\$ -	\$ (16,397.00)	\$ -	\$ -	\$ -	\$ -
Revenue		\$ (8,742,023.84)	\$ (8,835,774.00)	\$ (8,943,311.00)	\$ (8,943,311.00)	\$ (8,943,311.00)	\$ (8,943,311.00)
Personnel							
6100	Full Time Salaries	\$ 2,322,589.04	\$ 2,504,112.00	\$ 2,669,312.00	\$ 2,669,312.00	\$ 2,669,312.00	\$ 2,669,312.00
6101	Overtime Salaries	\$ 10,265.05	\$ 23,594.00	\$ 26,785.00	\$ 26,785.00	\$ 26,785.00	\$ 26,785.00
6105	Car Allowance	\$ 10,799.62	\$ 10,800.00	\$ 10,800.00	\$ 10,800.00	\$ 10,800.00	\$ 10,800.00
6108	Cell Phone Allowance	\$ 13,858.00	\$ 15,420.00	\$ 15,960.00	\$ 15,960.00	\$ 15,960.00	\$ 15,960.00
6110	Part-Time Salaries	\$ 196,372.38	\$ 469,895.00	\$ 549,670.00	\$ 549,670.00	\$ 549,670.00	\$ 549,670.00
6120	Retirement	\$ 398,724.92	\$ 445,014.00	\$ 466,365.00	\$ 466,365.00	\$ 466,365.00	\$ 466,365.00
6121	457 Pension	\$ 6,975.49	\$ 7,000.00	\$ 7,000.00	\$ 7,000.00	\$ 7,000.00	\$ 7,000.00
6125	Deferred Compensation	\$ 4,750.10	\$ 4,752.00	\$ 4,895.00	\$ 4,895.00	\$ 4,895.00	\$ 4,895.00
6130	Employee Insurance	\$ 336,637.27	\$ 351,958.00	\$ 372,401.00	\$ 372,401.00	\$ 372,401.00	\$ 372,401.00
6140	Workers Compensation	\$ 109,240.57	\$ 189,304.00	\$ 222,963.00	\$ 222,963.00	\$ 222,963.00	\$ 222,963.00
6150	Unemployment Insurance	\$ 29,026.50	\$ 40,000.00	\$ 10,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00
6160	Loan - Pension Obligation	\$ 24,742.00	\$ 264,218.00	\$ 132,893.00	\$ 132,893.00	\$ 132,893.00	\$ 132,893.00
6170	PERS Unfunded Liability	\$ 434,065.00	\$ 516,970.00	\$ 565,994.00	\$ 565,994.00	\$ 565,994.00	\$ 565,994.00
Personnel		\$ 3,898,045.94	\$ 4,843,037.00	\$ 5,055,038.00	\$ 5,060,038.00	\$ 5,060,038.00	\$ 5,060,038.00
Services and Supplies							
6200	Communications	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
6210	Telephone/Internet	\$ 20,318.01	\$ 23,008.00	\$ 23,132.00	\$ 23,132.00	\$ 23,132.00	\$ 23,132.00
6220	Internet Services	\$ 25,366.00	\$ 36,862.00	\$ 61,125.00	\$ 61,125.00	\$ 61,125.00	\$ 61,125.00
6230	IT Infrastructure	\$ 987.86	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
6240	Computer Hardware/Software	\$ 9,688.16	\$ 12,050.00	\$ 60,534.00	\$ 60,534.00	\$ 60,534.00	\$ 60,534.00
6310	Pool Chemicals	\$ 2,182.96	\$ 8,250.00	\$ 8,250.00	\$ 8,250.00	\$ 8,250.00	\$ 8,250.00
6320	Janitorial Supplies	\$ 41,241.82	\$ 48,408.00	\$ 48,408.00	\$ 48,408.00	\$ 48,408.00	\$ 48,408.00
6321	COVID - Supplies	\$ 10,285.84	\$ 5,600.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
6330	Kitchen Supplies	\$ -	\$ 1,000.00	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00
6340	Food Supplies	\$ -	\$ 12,745.00	\$ 14,850.00	\$ 14,850.00	\$ 14,850.00	\$ 14,850.00
6350	Water Maint & Service	\$ 940.05	\$ 1,265.00	\$ 1,265.00	\$ 1,265.00	\$ 1,265.00	\$ 1,265.00
6360	Laundry/Wash Service	\$ 178.00	\$ 880.00	\$ 1,220.00	\$ 1,220.00	\$ 1,220.00	\$ 1,220.00
6380	Medical Supplies	\$ -	\$ -	\$ 1,050.00	\$ 1,050.00	\$ 1,050.00	\$ 1,050.00
6410	Insurance Liability	\$ 208,084.00	\$ 236,698.00	\$ 284,038.00	\$ 284,038.00	\$ 284,038.00	\$ 284,038.00
6500	Equipment Maintenance	\$ 17.15	\$ 900.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
6510	Fuel	\$ 46,959.91	\$ 51,600.00	\$ 73,590.00	\$ 73,590.00	\$ 73,590.00	\$ 73,590.00
6520	Vehicle Maintenance	\$ 25,860.64	\$ 35,400.00	\$ 35,400.00	\$ 35,400.00	\$ 35,400.00	\$ 35,400.00
6530	Office Equipment Maintenance	\$ 116.89	\$ -	\$ -	\$ -	\$ -	\$ -

Pleasant Valley Recreation & Park District
FY 2022-2023 Budget
Fund 10

Account	Description	Two Year Prior Actual	One Year Prior Budget	Requested	Proposed	Approved	Adopted
6610	Building Repair	\$ 51,959.70	\$ 88,000.00	\$ 85,500.00	\$ 85,500.00	\$ 85,500.00	\$ 85,500.00
6620	HVAC	\$ 8,065.82	\$ 8,820.00	\$ 8,820.00	\$ 8,820.00	\$ 8,820.00	\$ 8,820.00
6630	Playground Maintenance	\$ 19,649.29	\$ 60,000.00	\$ 40,000.00	\$ 40,000.00	\$ 40,000.00	\$ 40,000.00
6705	Turf Removal	\$ -	\$ 20,000.00	\$ -	\$ -	\$ -	\$ -
6710	Grounds Maintenance	\$ 83,052.90	\$ 86,220.00	\$ 81,420.00	\$ 81,420.00	\$ 81,420.00	\$ 81,420.00
6719	Tree Care	\$ 29,996.85	\$ 30,000.00	\$ 30,000.00	\$ 30,000.00	\$ 30,000.00	\$ 30,000.00
6727	Fee Schedule	\$ -	\$ 16,397.00	\$ -	\$ -	\$ -	\$ -
6730	Contracted Pest Control	\$ 860.00	\$ 2,520.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00
6740	Rubbish & Refuse	\$ 69,003.56	\$ 79,346.00	\$ 79,830.00	\$ 79,830.00	\$ 79,830.00	\$ 79,830.00
6750	Vandalism/Theft	\$ 265.91	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00
6810	Memberships	\$ 12,370.00	\$ 14,435.00	\$ 15,047.00	\$ 15,047.00	\$ 15,047.00	\$ 15,047.00
6910	Office Supplies	\$ 5,369.07	\$ 12,709.00	\$ 25,020.00	\$ 25,020.00	\$ 25,020.00	\$ 25,020.00
6920	Postage Expense	\$ 1,052.40	\$ 12,700.00	\$ 18,640.00	\$ 18,640.00	\$ 18,640.00	\$ 18,640.00
6930	Advertising Expense	\$ 1,055.00	\$ 2,490.00	\$ 3,490.00	\$ 3,490.00	\$ 3,490.00	\$ 3,490.00
6940	Printing Charges	\$ 11,314.67	\$ 14,123.00	\$ 8,935.00	\$ 8,935.00	\$ 8,935.00	\$ 8,935.00
6950	Registration Fees	\$ 30,290.31	\$ 47,732.00	\$ 3,920.00	\$ 3,920.00	\$ 3,920.00	\$ 3,920.00
6960	Approp Redev/Collection Fees	\$ 509,538.40	\$ 545,454.00	\$ 552,000.00	\$ 552,000.00	\$ 552,000.00	\$ 552,000.00
6980	Minor Furn Fixture & Equip	\$ 1,121.45	\$ 1,137.00	\$ 1,137.00	\$ 1,137.00	\$ 1,137.00	\$ 1,137.00
7010	Fingerprint Fees (HR)	\$ 346.00	\$ 2,640.00	\$ 3,360.00	\$ 3,360.00	\$ 3,360.00	\$ 3,360.00
7020	Fire & Safety Insp Fees	\$ 2,239.93	\$ 3,800.00	\$ 4,725.00	\$ 4,725.00	\$ 4,725.00	\$ 4,725.00
7030	Permit & Licensing Fees	\$ 1,740.26	\$ 6,350.00	\$ 6,550.00	\$ 6,550.00	\$ 6,550.00	\$ 6,550.00
7040	State License Fee	\$ 657.50	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
7100	Professional Services	\$ 7,000.00	\$ 81,550.00	\$ 147,501.00	\$ 147,501.00	\$ 147,501.00	\$ 147,501.00
7110	Legal Services	\$ 47,226.36	\$ 90,000.00	\$ 90,000.00	\$ 90,000.00	\$ 90,000.00	\$ 90,000.00
7115	Typeset and Print Services	\$ -	\$ 29,300.00	\$ 36,600.00	\$ 36,600.00	\$ 36,600.00	\$ 36,600.00
7120	Instructor Services	\$ 58,711.02	\$ 108,303.00	\$ 77,265.00	\$ 77,265.00	\$ 77,265.00	\$ 77,265.00
7125	PERS Admin Fees	\$ 1,573.86	\$ 2,128.00	\$ 2,200.00	\$ 2,200.00	\$ 2,200.00	\$ 2,200.00
7130	Audit Services	\$ 12,760.00	\$ 20,275.00	\$ 20,875.00	\$ 20,875.00	\$ 20,875.00	\$ 20,875.00
7140	Medical & Health Svcs (HR)	\$ 1,275.00	\$ 6,420.00	\$ 12,170.00	\$ 12,170.00	\$ 12,170.00	\$ 12,170.00
7150	Security Services	\$ 2,932.50	\$ 4,147.00	\$ 5,422.00	\$ 5,422.00	\$ 5,422.00	\$ 5,422.00
7160	Entertainment Services	\$ -	\$ 2,400.00	\$ 5,800.00	\$ 5,800.00	\$ 5,800.00	\$ 5,800.00
7180	Business Services	\$ 83,023.90	\$ 67,660.00	\$ 107,769.00	\$ 107,769.00	\$ 107,769.00	\$ 107,769.00
7190	Umpire/Referee Services	\$ 323.75	\$ 1,500.00	\$ 1,650.00	\$ 1,650.00	\$ 1,650.00	\$ 1,650.00
7210	Subscriptions	\$ 1,423.98	\$ 3,723.00	\$ 2,550.00	\$ 2,550.00	\$ 2,550.00	\$ 2,550.00
7310	Rents & Leases - Equip	\$ 2,740.83	\$ 24,000.00	\$ 31,620.00	\$ 31,620.00	\$ 31,620.00	\$ 31,620.00
7320	Bldg/Field Leases & Rental	\$ 190.00	\$ 60.00	\$ 60.00	\$ 60.00	\$ 60.00	\$ 60.00
7410	Event Supplies	\$ 627.35	\$ 3,330.00	\$ 6,040.00	\$ 6,040.00	\$ 6,040.00	\$ 6,040.00
7420	Supplies	\$ 1,793.98	\$ 14,435.00	\$ 11,500.00	\$ 11,500.00	\$ 11,500.00	\$ 11,500.00
7430	Bingo Supplies	\$ 637.25	\$ 3,600.00	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00
7440	Sporting Goods	\$ 1,722.25	\$ 6,000.00	\$ 7,700.00	\$ 7,700.00	\$ 7,700.00	\$ 7,700.00
7450	Arts and Craft Supplies	\$ -	\$ 3,375.00	\$ 4,025.00	\$ 4,025.00	\$ 4,025.00	\$ 4,025.00
7460	Training Supplies	\$ 699.71	\$ 1,800.00	\$ 1,920.00	\$ 1,920.00	\$ 1,920.00	\$ 1,920.00
7500	Small Tools	\$ 4,873.00	\$ 6,000.00	\$ 6,000.00	\$ 6,000.00	\$ 6,000.00	\$ 6,000.00
7510	Safety Supplies	\$ 1,241.45	\$ 5,750.00	\$ 4,215.00	\$ 4,215.00	\$ 4,215.00	\$ 4,215.00
7610	Uniform Allowance	\$ 5,116.50	\$ 11,220.00	\$ 12,490.00	\$ 12,490.00	\$ 12,490.00	\$ 12,490.00
7620	Safety Clothing	\$ 2,757.49	\$ 4,764.00	\$ 5,404.00	\$ 5,404.00	\$ 5,404.00	\$ 5,404.00
7700	Transportation and Travel	\$ -	\$ 1,500.00	\$ 600.00	\$ 600.00	\$ 600.00	\$ 600.00
7710	Conference&Seminar Staff	\$ 6,938.33	\$ 23,196.00	\$ 30,591.00	\$ 30,591.00	\$ 30,591.00	\$ 30,591.00
7715	Conference&Seminar Board	\$ -	\$ 4,450.00	\$ 4,450.00	\$ 4,450.00	\$ 4,450.00	\$ 4,450.00
7720	Conference&Seminar Travel Exp	\$ -	\$ 13,718.00	\$ 26,949.00	\$ 26,949.00	\$ 26,949.00	\$ 26,949.00
7725	Out of Town Travel Board	\$ -	\$ 2,420.00	\$ 2,420.00	\$ 2,420.00	\$ 2,420.00	\$ 2,420.00
7730	Private Vehicle Mileage	\$ 123.00	\$ 3,892.00	\$ 6,025.00	\$ 6,025.00	\$ 6,025.00	\$ 6,025.00
7750	Buses/Excursions	\$ -	\$ 17,400.00	\$ 33,500.00	\$ 33,500.00	\$ 33,500.00	\$ 33,500.00
7760	Tuition/Book Reimbursement	\$ -	\$ -	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00
7810	Utilities - Gas	\$ 26,097.93	\$ 30,414.00	\$ 38,740.00	\$ 38,740.00	\$ 38,740.00	\$ 38,740.00
7820	Utilities - Water	\$ 888,333.71	\$ 899,999.00	\$ 910,143.00	\$ 910,143.00	\$ 910,143.00	\$ 910,143.00
7830	Utilities - Electric	\$ 155,202.20	\$ 210,000.00	\$ 217,575.00	\$ 217,575.00	\$ 217,575.00	\$ 217,575.00
7840	Airport Assessment Exp	\$ 842.00	\$ 14,000.00	\$ 14,000.00	\$ 14,000.00	\$ 14,000.00	\$ 14,000.00
7910	Awards and Certificates	\$ 2,674.27	\$ 14,206.00	\$ 16,130.00	\$ 16,130.00	\$ 16,130.00	\$ 16,130.00
7920	Meals for Staff Training	\$ 1,395.96	\$ 3,500.00	\$ 3,500.00	\$ 3,500.00	\$ 3,500.00	\$ 3,500.00
7930	Employee Morale	\$ 144.24	\$ 5,500.00	\$ 5,500.00	\$ 5,500.00	\$ 5,500.00	\$ 5,500.00
7950	COP Debt - PV Fields	\$ 229,759.38	\$ 223,760.00	\$ 217,560.00	\$ 217,560.00	\$ 217,560.00	\$ 217,560.00
7970	Reserve Vehicle Fleet	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
7971	Reserve Computer Fleet	\$ -	\$ -	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
7972	Reserve Designated Project	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
7973	Reserve Dry Period	\$ -	\$ 36,645.00	\$ 65,203.00	\$ 65,203.00	\$ 65,203.00	\$ 65,203.00
7974	Reserve Capital Improvements	\$ -	\$ -	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00
7975	Reserve Repair/Oper/Admin	\$ -	\$ 100,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00
7976	Reserve - Compensated Absences	\$ -	\$ 75,000.00	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00

**Pleasant Valley Recreation & Park District
FY 2022-2023 Budget
Fund 10**

Account	Description	Two Year Prior Actual	One Year Prior Budget	Requested	Proposed	Approved	Adopted
8112	Admin Fee/CC Refund 2020	\$ 11,792.34	\$ -	\$ -	\$ -	\$ -	\$ -
8300	Structures & Improvements	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Services and Supplies		\$ 2,794,129.85	\$ 3,714,379.00	\$ 3,863,418.00	\$ 3,863,418.00	\$ 3,863,418.00	\$ 3,863,418.00
Capital							
8400	Capital	\$ -	\$ -	\$ 645,000.00	\$ 765,000.00	\$ 765,000.00	\$ 765,000.00
8420	Equip/Facility Replacement	\$ 269.42	\$ 64,730.00	\$ 97,500.00	\$ 97,500.00	\$ 97,500.00	\$ 97,500.00
8468	Community Center Marquee	\$ 3,997.52	\$ -	\$ -	\$ -	\$ -	\$ -
8474	Switches and Servers	\$ 29,642.96	\$ -	\$ -	\$ -	\$ -	\$ -
8475	Turf Grinder	\$ 14,366.14	\$ -	\$ -	\$ -	\$ -	\$ -
8476	Pitts Ranch BB Crt Repaint	\$ 7,950.00	\$ -	\$ -	\$ -	\$ -	\$ -
8477	PV Fields Painting West End	\$ 8,830.00	\$ -	\$ -	\$ -	\$ -	\$ -
8479	Inflatable System	\$ -	\$ 5,500.00	\$ -	\$ -	\$ -	\$ -
8481	HVAC Administration Bldg	\$ 13,200.00	\$ -	\$ -	\$ -	\$ -	\$ -
8482	HVAC for Room #6	\$ 10,876.76	\$ -	\$ -	\$ -	\$ -	\$ -
8483	ECAA Loan-Lighting Project	\$ -	\$ 190,000.00	\$ -	\$ -	\$ -	\$ -
8485	HVAC Conference Room	\$ -	\$ 15,000.00	\$ -	\$ -	\$ -	\$ -
8486	Pool Vacuum	\$ -	\$ 6,000.00	\$ -	\$ -	\$ -	\$ -
8487	Springville Parking Lot	\$ -	\$ 80,000.00	\$ -	\$ -	\$ -	\$ -
8488	Mission Oaks Parking Lot	\$ -	\$ 100,000.00	\$ -	\$ -	\$ -	\$ -
8489	Tennis Court Lighting	\$ -	\$ 140,000.00	\$ -	\$ -	\$ -	\$ -
8491	Senior Center Carpeting	\$ -	\$ 15,000.00	\$ -	\$ -	\$ -	\$ -
8492	Sr Ctr Upgrade to Sound Board	\$ -	\$ 15,000.00	\$ -	\$ -	\$ -	\$ -
8494	Bingo Console	\$ -	\$ 15,000.00	\$ -	\$ -	\$ -	\$ -
8495	Turf Sweeper	\$ -	\$ 8,190.00	\$ -	\$ -	\$ -	\$ -
8496	ADA Transition Plan	\$ -	\$ 82,880.00	\$ -	\$ -	\$ -	\$ -
Capital		\$ 89,132.80	\$ 737,300.00	\$ 742,500.00	\$ 862,500.00	\$ 862,500.00	\$ 862,500.00
Revenue Total		\$ (8,742,023.84)	\$ (8,835,774.00)	\$ (8,943,311.00)	\$ (8,943,311.00)	\$ (8,943,311.00)	\$ (8,943,311.00)
Expense Total		\$ 6,692,175.79	\$ 8,557,416.00	\$ 8,918,456.00	\$ 8,923,456.00	\$ 8,923,456.00	\$ 8,923,456.00
Grand Total		\$ 2,049,848.05	\$ 278,358.00	\$ 24,855.00	\$ 19,855.00	\$ 19,855.00	\$ 19,855.00
Expense and Capital		\$ 6,781,308.59	\$ 9,294,716.00	\$ 9,660,956.00	\$ 9,785,956.00	\$ 9,785,956.00	\$ 9,785,956.00

Pleasant Valley Recreation & Park District
FY 2022-2023 Budget
Recreation Wrap-Up

Account	Description	Two Year Prior Actual	One Year Prior Budget	Requested	Proposed	Approved	Adopted
Revenue							
5508	Bingo Revenue	\$ (2,736.25)	\$ (14,400.00)	\$ (14,400.00)	\$ (14,400.00)	\$ (14,400.00)	\$ (14,400.00)
5509	Excess Bingo Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
5510	Contract Classes-Public Fees	\$ (128,766.25)	\$ (128,380.00)	\$ (131,313.00)	\$ (131,313.00)	\$ (131,313.00)	\$ (131,313.00)
5511	Public Fees	\$ (84,817.19)	\$ (200,771.00)	\$ (300,001.00)	\$ (300,001.00)	\$ (300,001.00)	\$ (300,001.00)
5520	Public Fees-Entry Fees	\$ (10,764.00)	\$ (25,840.00)	\$ (25,840.00)	\$ (25,840.00)	\$ (25,840.00)	\$ (25,840.00)
5524	Swim Pass-Adult Splash (10)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
5525	Vending Concessions	\$ -	\$ (2,500.00)	\$ (1,450.00)	\$ (1,450.00)	\$ (1,450.00)	\$ (1,450.00)
5530	Rental	\$ (110,203.85)	\$ (109,220.00)	\$ (129,192.00)	\$ (129,192.00)	\$ (129,192.00)	\$ (129,192.00)
5555	Activity Guide Revenue	\$ (1,750.00)	\$ (10,000.00)	\$ (10,000.00)	\$ (10,000.00)	\$ (10,000.00)	\$ (10,000.00)
5558	Sponsorships/Donations	\$ (4,065.00)	\$ (1,000.00)	\$ -	\$ -	\$ -	\$ -
5563	Staffing Cost Recovery	\$ (19,954.00)	\$ (8,730.00)	\$ (39,050.00)	\$ (39,050.00)	\$ (39,050.00)	\$ (39,050.00)
5564	Special Event Permits	\$ (600.00)	\$ -	\$ -	\$ -	\$ -	\$ -
Revenue		\$ (363,656.54)	\$ (500,841.00)	\$ (651,246.00)	\$ (651,246.00)	\$ (651,246.00)	\$ (651,246.00)
Personnel							
6100	Full Time Salaries	\$ 506,826.84	\$ 456,765.00	\$ 453,582.00	\$ 453,582.00	\$ 453,582.00	\$ 453,582.00
6101	Overtime Salaries	\$ 12.36	\$ -	\$ -	\$ -	\$ -	\$ -
6105	Car Allowance	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
6108	Cell Phone Allowance	\$ 2,370.00	\$ 2,340.00	\$ 2,340.00	\$ 2,340.00	\$ 2,340.00	\$ 2,340.00
6110	Part-Time Salaries	\$ 62,407.03	\$ 285,099.00	\$ 366,031.00	\$ 366,031.00	\$ 366,031.00	\$ 366,031.00
6120	Retirement	\$ 81,248.67	\$ 78,466.00	\$ 85,790.00	\$ 85,790.00	\$ 85,790.00	\$ 85,790.00
6130	Employee Insurance	\$ 49,664.11	\$ 41,536.00	\$ 59,995.00	\$ 59,995.00	\$ 59,995.00	\$ 59,995.00
6140	Workers Compensation	\$ 9,782.65	\$ 19,450.00	\$ 24,064.00	\$ 24,064.00	\$ 24,064.00	\$ 24,064.00
Personnel		\$ 712,311.66	\$ 883,656.00	\$ 991,802.00	\$ 991,802.00	\$ 991,802.00	\$ 991,802.00
Services and Supplies							
6321	COVID-19	\$ -	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00
6330	Kitchen Supplies	\$ -	\$ 1,000.00	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00
6340	Food Supplies	\$ -	\$ 11,745.00	\$ 14,850.00	\$ 14,850.00	\$ 14,850.00	\$ 14,850.00
6360	Laundry/Wash Service	\$ 178.00	\$ 700.00	\$ 1,040.00	\$ 1,040.00	\$ 1,040.00	\$ 1,040.00
6380	Medical Supplies	\$ -	\$ -	\$ 1,050.00	\$ 1,050.00	\$ 1,050.00	\$ 1,050.00
6500	Equipment Maintenance	\$ 17.15	\$ 900.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
6530	Office Equipment Maintenance	\$ 116.89	\$ -	\$ -	\$ -	\$ -	\$ -
6810	Memberships	\$ 185.00	\$ 145.00	\$ 120.00	\$ 120.00	\$ 120.00	\$ 120.00
6910	Office Supplies	\$ 96.85	\$ 1,250.00	\$ 3,600.00	\$ 3,600.00	\$ 3,600.00	\$ 3,600.00
6920	Postage Expense	\$ -	\$ 11,200.00	\$ 16,900.00	\$ 16,900.00	\$ 16,900.00	\$ 16,900.00
7020	Fire & Safety Insp Fees	\$ -	\$ 1,400.00	\$ 1,750.00	\$ 1,750.00	\$ 1,750.00	\$ 1,750.00
7030	Permit & Licensing Fees	\$ -	\$ 3,550.00	\$ 3,750.00	\$ 3,750.00	\$ 3,750.00	\$ 3,750.00
7100	Professional Services	\$ -	\$ 1,000.00	\$ 12,001.00	\$ 12,001.00	\$ 12,001.00	\$ 12,001.00
7115	Typeset and Print Services	\$ -	\$ 29,300.00	\$ 36,600.00	\$ 36,600.00	\$ 36,600.00	\$ 36,600.00
7120	Instructor Services	\$ 57,526.03	\$ 106,503.00	\$ 75,465.00	\$ 75,465.00	\$ 75,465.00	\$ 75,465.00
7140	Medical & Health Svcs (HR)	\$ -	\$ 1,500.00	\$ 6,250.00	\$ 6,250.00	\$ 6,250.00	\$ 6,250.00
7150	Security Services	\$ -	\$ 650.00	\$ 1,475.00	\$ 1,475.00	\$ 1,475.00	\$ 1,475.00
7160	Entertainment Services	\$ -	\$ 1,400.00	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00
7180	Business Services	\$ 2,197.97	\$ 4,420.00	\$ 14,470.00	\$ 14,470.00	\$ 14,470.00	\$ 14,470.00
7190	Umpire/Referee Services	\$ 323.75	\$ 1,500.00	\$ 1,650.00	\$ 1,650.00	\$ 1,650.00	\$ 1,650.00
7210	Subscriptions	\$ -	\$ 175.00	\$ 175.00	\$ 175.00	\$ 175.00	\$ 175.00
7310	Rents & Leases - Equip	\$ (132.40)	\$ 10,800.00	\$ 18,420.00	\$ 18,420.00	\$ 18,420.00	\$ 18,420.00
7320	Bldg/Field Leases & Rental	\$ 190.00	\$ 60.00	\$ 60.00	\$ 60.00	\$ 60.00	\$ 60.00
7410	Event Supplies	\$ -	\$ 1,410.00	\$ 5,620.00	\$ 5,620.00	\$ 5,620.00	\$ 5,620.00
7420	Supplies	\$ 1,793.98	\$ 14,435.00	\$ 11,500.00	\$ 11,500.00	\$ 11,500.00	\$ 11,500.00
7430	Bingo Supplies	\$ 637.25	\$ 3,600.00	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00
7440	Sporting Goods	\$ -	\$ 3,600.00	\$ 5,100.00	\$ 5,100.00	\$ 5,100.00	\$ 5,100.00
7450	Arts and Craft Supplies	\$ -	\$ 3,375.00	\$ 4,025.00	\$ 4,025.00	\$ 4,025.00	\$ 4,025.00
7460	Training Supplies	\$ 200.00	\$ 1,000.00	\$ 850.00	\$ 850.00	\$ 850.00	\$ 850.00
7510	Safety Supplies	\$ 1,031.27	\$ 4,850.00	\$ 2,160.00	\$ 2,160.00	\$ 2,160.00	\$ 2,160.00
7610	Uniform Allowance	\$ 9.65	\$ 2,560.00	\$ 3,390.00	\$ 3,390.00	\$ 3,390.00	\$ 3,390.00
7700	Transportation and Travel	\$ -	\$ 1,500.00	\$ 600.00	\$ 600.00	\$ 600.00	\$ 600.00
7710	Conference&Seminar Staff	\$ 45.00	\$ 5,970.00	\$ 6,000.00	\$ 6,000.00	\$ 6,000.00	\$ 6,000.00
7720	Conference&Seminar Travel Exp	\$ -	\$ 3,500.00	\$ 18,390.00	\$ 18,390.00	\$ 18,390.00	\$ 18,390.00
7730	Private Vehicle Mileage	\$ 87.58	\$ 1,416.00	\$ 5,040.00	\$ 5,040.00	\$ 5,040.00	\$ 5,040.00
7750	Buses/Excursions	\$ -	\$ 17,400.00	\$ 33,500.00	\$ 33,500.00	\$ 33,500.00	\$ 33,500.00
7910	Awards and Certificates	\$ 2,434.86	\$ 13,676.00	\$ 15,390.00	\$ 15,390.00	\$ 15,390.00	\$ 15,390.00
8112	Sponsorship Refund 2020	\$ 10,800.34	\$ -	\$ -	\$ -	\$ -	\$ -
Services and Supplies		\$ 77,739.17	\$ 267,990.00	\$ 333,491.00	\$ 333,491.00	\$ 333,491.00	\$ 333,491.00
Capital							

**Pleasant Valley Recreation & Park District
FY 2022-2023 Budget
Recreation Wrap-Up**

Account	Description	Two Year Prior Actual	One Year Prior Budget	Requested	Proposed	Approved	Adopted
8420	Equip/Facility Replacement	\$ -	\$ -	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00
8479	Inflatable System	\$ -	\$ 5,500.00	\$ -	\$ -	\$ -	\$ -
8494	Bingo Console	\$ -	\$ 15,000.00	\$ -	\$ -	\$ -	\$ -
Capital		\$ -	\$ 20,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00
Revenue Total		\$ (363,656.54)	\$ (500,841.00)	\$ (651,246.00)	\$ (651,246.00)	\$ (651,246.00)	\$ (651,246.00)
Expense Total		\$ 790,050.83	\$ 1,151,646.00	\$ 1,325,293.00	\$ 1,325,293.00	\$ 1,325,293.00	\$ 1,325,293.00
Grand Total		\$ (426,394.29)	\$ (650,805.00)	\$ (674,047.00)	\$ (674,047.00)	\$ (674,047.00)	\$ (674,047.00)
Expense and Capital		\$ 790,050.83	\$ 1,172,146.00	\$ 1,332,793.00	\$ 1,332,793.00	\$ 1,332,793.00	\$ 1,332,793.00

**Pleasant Valley Recreation & Park District
FY 2022-2023 Budget
District Wide (000)**

Account	Description	Two Year Prior Actual	One Year Prior Budget	Requested	Proposed	Approved	Adopted
Revenue							
5110	Tax Apport - Cur Year Secured	\$ (6,982,262.02)	\$ (7,301,920.00)	\$ (7,634,345.00)	\$ (7,634,345.00)	\$ (7,634,345.00)	\$ (7,634,345.00)
5120	Tax Apport - Cur Year Unsec	\$ (121,378.02)	\$ -	\$ -	\$ -	\$ -	\$ -
5130	Tax Apport - Prior Year Sec	\$ (111,169.16)	\$ -	\$ -	\$ -	\$ -	\$ -
5140	Tax Apport - Prior Year Unsec	\$ (6,238.93)	\$ -	\$ -	\$ -	\$ -	\$ -
5150	Tax Deeded Sales	\$ (4.49)	\$ -	\$ -	\$ -	\$ -	\$ -
5210	Cur Supplemental Pass Thru	\$ (107,826.47)	\$ -	\$ -	\$ -	\$ -	\$ -
5230	HOPTR	\$ (38,108.95)	\$ -	\$ -	\$ -	\$ -	\$ -
5240	Supplemental Assessment Roll	\$ (164.35)	\$ -	\$ -	\$ -	\$ -	\$ -
5310	Interest Earnings	\$ (31,025.82)	\$ (14,928.00)	\$ (9,893.00)	\$ (9,893.00)	\$ (9,893.00)	\$ (9,893.00)
5585	Incentive Income	\$ (846.09)	\$ (2,400.00)	\$ (1,400.00)	\$ (1,400.00)	\$ (1,400.00)	\$ (1,400.00)
5600	Reimbursement - ROPS	\$ (373,105.94)	\$ (325,000.00)	\$ (200,000.00)	\$ (200,000.00)	\$ (200,000.00)	\$ (200,000.00)
5991	Surplus Carryover	\$ -	\$ (16,397.00)	\$ -	\$ -	\$ -	\$ -
Revenue	Revenue	\$ (7,772,130.24)	\$ (7,660,645.00)	\$ (7,845,638.00)	\$ (7,845,638.00)	\$ (7,845,638.00)	\$ (7,845,638.00)
Services and Supplies							
7950	COP Debt - PV Fields	\$ 229,759.38	\$ 223,760.00	\$ 217,560.00	\$ 217,560.00	\$ 217,560.00	\$ 217,560.00
Services and Supplies		\$ 229,759.38	\$ 223,760.00	\$ 217,560.00	\$ 217,560.00	\$ 217,560.00	\$ 217,560.00
Revenue Total		\$ (7,772,130.24)	\$ (7,660,645.00)	\$ (7,845,638.00)	\$ (7,845,638.00)	\$ (7,845,638.00)	\$ (7,845,638.00)
Expense Total		\$ 229,759.38	\$ 223,760.00	\$ 217,560.00	\$ 217,560.00	\$ 217,560.00	\$ 217,560.00
Grand Total		\$ 7,542,370.86	\$ 7,436,885.00	\$ 7,628,078.00	\$ 7,628,078.00	\$ 7,628,078.00	\$ 7,628,078.00

Pleasant Valley Recreation & Park District
FY 2022-2023 Budget
Aquatics (301)

Account	Description	Two Year Prior Actual	One Year Prior Budget	Requested	Proposed	Approved	Adopted
Revenue							
5510	Contract Classes-Public Fees	\$ (12,274.00)	\$ (14,286.00)	\$ (19,336.00)	\$ (19,336.00)	\$ (19,336.00)	\$ (19,336.00)
5511	Public Fees	\$ (57,761.44)	\$ (80,421.00)	\$ (91,641.00)	\$ (91,641.00)	\$ (91,641.00)	\$ (91,641.00)
5520	Public Fees-Entry Fees	\$ (10,764.00)	\$ (25,840.00)	\$ (25,840.00)	\$ (25,840.00)	\$ (25,840.00)	\$ (25,840.00)
5525	Vending Concessions	\$ -	\$ (1,250.00)	\$ (800.00)	\$ (800.00)	\$ (800.00)	\$ (800.00)
5530	Rental	\$ (12,228.50)	\$ (15,455.00)	\$ (16,100.00)	\$ (16,100.00)	\$ (16,100.00)	\$ (16,100.00)
5563	Staffing Cost Recovery	\$ (10,962.00)	\$ (7,480.00)	\$ (14,920.00)	\$ (14,920.00)	\$ (14,920.00)	\$ (14,920.00)
Revenue		\$ (103,989.94)	\$ (144,732.00)	\$ (168,637.00)	\$ (168,637.00)	\$ (168,637.00)	\$ (168,637.00)
Personnel							
6100	Full Time Salaries	\$ 72,659.67	\$ 72,743.00	\$ 81,452.00	\$ 81,452.00	\$ 81,452.00	\$ 81,452.00
6101	Overtime Salaries	\$ 4.14	\$ -	\$ -	\$ -	\$ -	\$ -
6108	Cell Phone Allowance	\$ 780.00	\$ 780.00	\$ 780.00	\$ 780.00	\$ 780.00	\$ 780.00
6110	Part-Time Salaries	\$ 57,254.69	\$ 204,948.00	\$ 223,633.00	\$ 223,633.00	\$ 223,633.00	\$ 223,633.00
6120	Retirement	\$ 11,328.29	\$ 14,192.00	\$ 18,314.00	\$ 18,314.00	\$ 18,314.00	\$ 18,314.00
6130	Employee Insurance	\$ 16,621.45	\$ 18,177.00	\$ 18,784.00	\$ 18,784.00	\$ 18,784.00	\$ 18,784.00
6140	Workers Compensation	\$ 2,505.28	\$ 7,077.00	\$ 8,542.00	\$ 8,542.00	\$ 8,542.00	\$ 8,542.00
Personnel		\$ 161,153.52	\$ 317,917.00	\$ 351,505.00	\$ 351,505.00	\$ 351,505.00	\$ 351,505.00
Services and Supplies							
6321	COVID-19	\$ -	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00
6500	Equipment Maintenance	\$ 17.15	\$ 900.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
6910	Office Supplies	\$ -	\$ -	\$ 600.00	\$ 600.00	\$ 600.00	\$ 600.00
7115	Typeset and Print Services	\$ -	\$ 300.00	\$ 600.00	\$ 600.00	\$ 600.00	\$ 600.00
7120	Instructor Services	\$ 5,960.50	\$ 9,286.00	\$ 12,568.00	\$ 12,568.00	\$ 12,568.00	\$ 12,568.00
7180	Business Services	\$ 459.98	\$ 620.00	\$ 620.00	\$ 620.00	\$ 620.00	\$ 620.00
7410	Event Supplies	\$ -	\$ 1,410.00	\$ 1,620.00	\$ 1,620.00	\$ 1,620.00	\$ 1,620.00
7460	Training Supplies	\$ 200.00	\$ 1,000.00	\$ 350.00	\$ 350.00	\$ 350.00	\$ 350.00
7510	Safety Supplies	\$ 1,031.27	\$ 4,850.00	\$ 1,360.00	\$ 1,360.00	\$ 1,360.00	\$ 1,360.00
7610	Uniform Allowance	\$ -	\$ 1,000.00	\$ 1,440.00	\$ 1,440.00	\$ 1,440.00	\$ 1,440.00
7910	Awards and Certificates	\$ 1,031.00	\$ 2,525.00	\$ 2,525.00	\$ 2,525.00	\$ 2,525.00	\$ 2,525.00
8112	Staffing Cost Refund 2020	\$ 10,114.34	\$ -	\$ -	\$ -	\$ -	\$ -
Services and Supplies		\$ 18,814.24	\$ 22,391.00	\$ 23,183.00	\$ 23,183.00	\$ 23,183.00	\$ 23,183.00
Capital							
8420	Equip/Facility Replacements	\$ -	\$ -	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00
Capital				\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00
Revenue Total		\$ (103,989.94)	\$ (144,732.00)	\$ (168,637.00)	\$ (168,637.00)	\$ (168,637.00)	\$ (168,637.00)
Expense Total		\$ 179,967.76	\$ 340,308.00	\$ 374,688.00	\$ 374,688.00	\$ 374,688.00	\$ 374,688.00
Grand Total		\$ (75,977.82)	\$ (195,576.00)	\$ (206,051.00)	\$ (206,051.00)	\$ (206,051.00)	\$ (206,051.00)
Expense & Capital		\$ 179,967.76	\$ 340,308.00	\$ 382,188.00	\$ 382,188.00	\$ 382,188.00	\$ 382,188.00

**Pleasant Valley Recreation & Park District
FY 2022-2023 Budget
Sports (310)**

Account	Description	Two Year Prior Actual	One Year Prior Budget	Requested	Proposed	Approved	Adopted
Revenue							
5511	Public Fees	\$ (22,342.00)	\$ (65,445.00)	\$ (63,855.00)	\$ (63,855.00)	\$ (63,855.00)	\$ (63,855.00)
5530	Rental	\$ (97,975.35)	\$ (93,765.00)	\$ (113,092.00)	\$ (113,092.00)	\$ (113,092.00)	\$ (113,092.00)
5563	Staffing Cost Recovery	\$ -	\$ -	\$ (2,880.00)	\$ (2,880.00)	\$ (2,880.00)	\$ (2,880.00)
Revenue		\$ (120,317.35)	\$ (159,210.00)	\$ (179,827.00)	\$ (179,827.00)	\$ (179,827.00)	\$ (179,827.00)
Personnel							
6100	Full Time Salaries	\$ 85,196.17	\$ 94,489.00	\$ 82,908.00	\$ 82,908.00	\$ 82,908.00	\$ 82,908.00
6108	Cell Phone Allowance	\$ 780.00	\$ 390.00	\$ 390.00	\$ 390.00	\$ 390.00	\$ 390.00
6110	Part-Time Salaries	\$ 2,132.74	\$ 17,311.00	\$ 21,623.00	\$ 21,623.00	\$ 21,623.00	\$ 21,623.00
6120	Retirement	\$ 15,364.38	\$ 16,674.00	\$ 14,806.00	\$ 14,806.00	\$ 14,806.00	\$ 14,806.00
6130	Employee Insurance	\$ 4,862.59	\$ 7,472.00	\$ 7,098.00	\$ 7,098.00	\$ 7,098.00	\$ 7,098.00
6140	Workers Compensation	\$ 1,781.19	\$ 2,936.00	\$ 2,927.00	\$ 2,927.00	\$ 2,927.00	\$ 2,927.00
Personnel		\$ 110,117.07	\$ 139,272.00	\$ 129,752.00	\$ 129,752.00	\$ 129,752.00	\$ 129,752.00
Services and Supplies							
6380	Medical Supplies	\$ -	\$ -	\$ 600.00	\$ 600.00	\$ 600.00	\$ 600.00
6810	Memberships	\$ 20.00	\$ 20.00	\$ 70.00	\$ 70.00	\$ 70.00	\$ 70.00
7180	Business Services	\$ 1,359.99	\$ 1,400.00	\$ 1,450.00	\$ 1,450.00	\$ 1,450.00	\$ 1,450.00
7190	Umpire/Referee Services	\$ 323.75	\$ 1,500.00	\$ 1,650.00	\$ 1,650.00	\$ 1,650.00	\$ 1,650.00
7310	Rents & Leases - Equip	\$ -	\$ 8,800.00	\$ 9,120.00	\$ 9,120.00	\$ 9,120.00	\$ 9,120.00
7440	Sporting Goods	\$ -	\$ 3,600.00	\$ 5,100.00	\$ 5,100.00	\$ 5,100.00	\$ 5,100.00
7610	Uniform Allowance	\$ 9.65	\$ -	\$ -	\$ -	\$ -	\$ -
7910	Awards and Certificates	\$ 1,264.43	\$ 11,126.00	\$ 11,565.00	\$ 11,565.00	\$ 11,565.00	\$ 11,565.00
Services and Supplies		\$ 2,977.82	\$ 26,446.00	\$ 29,555.00	\$ 29,555.00	\$ 29,555.00	\$ 29,555.00
Revenue Total		\$ (120,317.35)	\$ (159,210.00)	\$ (179,827.00)	\$ (179,827.00)	\$ (179,827.00)	\$ (179,827.00)
Expense Total		\$ 113,094.89	\$ 165,718.00	\$ 159,307.00	\$ 159,307.00	\$ 159,307.00	\$ 159,307.00
Grand Total		\$ 7,222.46	\$ (6,508.00)	\$ 20,520.00	\$ 20,520.00	\$ 20,520.00	\$ 20,520.00

Pleasant Valley Recreation & Park District
FY 2022-2023 Budget
Camps/Classes/Community Partnerships (320)

Account	Description	Two Year Prior Actual	One Year Prior Budget	Requested	Proposed	Approved	Adopted
Revenue							
5510	Contract Classes-Public Fees	\$ (116,456.25)	\$ (114,094.00)	\$ (111,977.00)	\$ (111,977.00)	\$ (111,977.00)	\$ (111,977.00)
5511	Public Fees	\$ (260.00)	\$ (12,710.00)	\$ (81,250.00)	\$ (81,250.00)	\$ (81,250.00)	\$ (81,250.00)
Revenue		\$ (116,716.25)	\$ (126,804.00)	\$ (193,227.00)	\$ (193,227.00)	\$ (193,227.00)	\$ (193,227.00)
Personnel							
6100	Full Time Salaries	\$ 64,047.07	\$ -	\$ 33,453.00	\$ 33,453.00	\$ 33,453.00	\$ 33,453.00
6101	Overtime Salaries	\$ 8.10	\$ -	\$ -	\$ -	\$ -	\$ -
6110	Part-Time Salaries	\$ 958.10	\$ 24,600.00	\$ 66,231.00	\$ 66,231.00	\$ 66,231.00	\$ 66,231.00
6120	Retirement	\$ 9,535.68	\$ 594.00	\$ 6,018.00	\$ 6,018.00	\$ 6,018.00	\$ 6,018.00
6130	Employee Insurance	\$ 11,190.53	\$ -	\$ 2,324.00	\$ 2,324.00	\$ 2,324.00	\$ 2,324.00
6140	Workers Compensation	\$ 701.56	\$ 1,040.00	\$ 2,791.00	\$ 2,791.00	\$ 2,791.00	\$ 2,791.00
Personnel		\$ 86,441.04	\$ 26,234.00	\$ 110,817.00	\$ 110,817.00	\$ 110,817.00	\$ 110,817.00
Services and Supplies							
6340	Food Supplies	\$ -	\$ 795.00	\$ 900.00	\$ 900.00	\$ 900.00	\$ 900.00
6380	Medical Supplies	\$ -	\$ -	\$ 450.00	\$ 450.00	\$ 450.00	\$ 450.00
6810	Memberships	\$ 165.00	\$ 125.00	\$ -	\$ -	\$ -	\$ -
7120	Instructor Services	\$ 51,565.53	\$ 97,217.00	\$ 62,897.00	\$ 62,897.00	\$ 62,897.00	\$ 62,897.00
7180	Business Services	\$ -	\$ 1,500.00	\$ 6,750.00	\$ 6,750.00	\$ 6,750.00	\$ 6,750.00
7420	Supplies	\$ -	\$ -	\$ 800.00	\$ 800.00	\$ 800.00	\$ 800.00
7440	Sporting Goods	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
7450	Arts and Craft Supplies	\$ -	\$ 3,375.00	\$ 4,025.00	\$ 4,025.00	\$ 4,025.00	\$ 4,025.00
7460	Training Supplies	\$ -	\$ -	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00
7510	Safety Supplies	\$ -	\$ -	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00
7610	Uniform Allowance	\$ -	\$ -	\$ 450.00	\$ 450.00	\$ 450.00	\$ 450.00
7750	Buses/Excursions	\$ -	\$ 1,400.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00
8112	Classes Refund 2020	\$ 686.00	\$ -	\$ -	\$ -	\$ -	\$ -
Services and Supplies		\$ 52,416.53	\$ 104,412.00	\$ 84,772.00	\$ 84,772.00	\$ 84,772.00	\$ 84,772.00
Capital							
8479	Inflatable System	\$ -	\$ 5,500.00	\$ -	\$ -	\$ -	\$ -
Capital		\$ -	\$ 5,500.00	\$ -	\$ -	\$ -	\$ -
Revenue Total		\$ (116,716.25)	\$ (126,804.00)	\$ (193,227.00)	\$ (193,227.00)	\$ (193,227.00)	\$ (193,227.00)
Expense Total		\$ 138,857.57	\$ 130,646.00	\$ 195,589.00	\$ 195,589.00	\$ 195,589.00	\$ 195,589.00
Grand Total		\$ (22,141.32)	\$ (3,842.00)	\$ (2,362.00)	\$ (2,362.00)	\$ (2,362.00)	\$ (2,362.00)
Expense and Capital		\$ 138,857.57	\$ 136,146.00	\$ 195,589.00	\$ 195,589.00	\$ 195,589.00	\$ 195,589.00

**Pleasant Valley Recreation & Park District
FY 2022-2023 Budget
Senior Services (370)**

Account	Description	Two Year Prior Actual	One Year Prior Budget	Requested	Proposed	Approved	Adopted
Revenue							
5508	Bingo Revenue	\$ (2,736.25)	\$ (14,400.00)	\$ (14,400.00)	\$ (14,400.00)	\$ (14,400.00)	\$ (14,400.00)
5510	Contract Classes-Public Fees	\$ (36.00)	\$ -	\$ -	\$ -	\$ -	\$ -
5511	Public Fees	\$ (3,343.75)	\$ (14,400.00)	\$ (35,960.00)	\$ (35,960.00)	\$ (35,960.00)	\$ (35,960.00)
5525	Vending Concessions	\$ -	\$ (1,250.00)	\$ (650.00)	\$ (650.00)	\$ (650.00)	\$ (650.00)
Revenue		\$ (6,116.00)	\$ (30,050.00)	\$ (51,010.00)	\$ (51,010.00)	\$ (51,010.00)	\$ (51,010.00)
Personnel							
6100	Full Time Salaries	\$ 81,764.45	\$ 89,788.00	\$ 66,721.00	\$ 66,721.00	\$ 66,721.00	\$ 66,721.00
6108	Cell Phone Allowance	\$ 30.00	\$ 390.00	\$ 390.00	\$ 390.00	\$ 390.00	\$ 390.00
6110	Part-Time Salaries	\$ 1,176.00	\$ 20,010.00	\$ 24,335.00	\$ 24,335.00	\$ 24,335.00	\$ 24,335.00
6120	Retirement	\$ 14,164.31	\$ 15,892.00	\$ 17,570.00	\$ 17,570.00	\$ 17,570.00	\$ 17,570.00
6130	Employee Insurance	\$ 795.69	\$ 931.00	\$ 1,188.00	\$ 1,188.00	\$ 1,188.00	\$ 1,188.00
6140	Workers Compensation	\$ 1,412.90	\$ 2,927.00	\$ 3,665.00	\$ 3,665.00	\$ 3,665.00	\$ 3,665.00
Personnel		\$ 99,343.35	\$ 129,938.00	\$ 113,869.00	\$ 113,869.00	\$ 113,869.00	\$ 113,869.00
Services and Supplies							
6330	Kitchen Supplies	\$ -	\$ 900.00	\$ 900.00	\$ 900.00	\$ 900.00	\$ 900.00
6340	Food Supplies	\$ -	\$ 10,950.00	\$ 10,950.00	\$ 10,950.00	\$ 10,950.00	\$ 10,950.00
7030	Permit & Licensing Fees	\$ -	\$ 700.00	\$ 700.00	\$ 700.00	\$ 700.00	\$ 700.00
7210	Subscriptions	\$ -	\$ 175.00	\$ 175.00	\$ 175.00	\$ 175.00	\$ 175.00
7410	Program Supplies	\$ -	\$ -	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00
7420	Supplies	\$ 300.00	\$ -	\$ -	\$ -	\$ -	\$ -
7430	Bingo Supplies	\$ 637.25	\$ 3,600.00	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00
7510	Safety Supplies	\$ -	\$ -	\$ 300.00	\$ 300.00	\$ 300.00	\$ 300.00
7610	Uniform Allowance	\$ -	\$ -	\$ 150.00	\$ 150.00	\$ 150.00	\$ 150.00
7710	Conference&Seminar Staff	\$ 45.00	\$ -	\$ -	\$ -	\$ -	\$ -
7730	Private Vehicle Mileage	\$ 4.64	\$ -	\$ 1,500.00	\$ 1,500.00	\$ 1,500.00	\$ 1,500.00
7750	Buses/Excursions	\$ -	\$ 16,000.00	\$ 26,000.00	\$ 26,000.00	\$ 26,000.00	\$ 26,000.00
7910	Awards and Certificates	\$ 139.43	\$ 25.00	\$ -	\$ -	\$ -	\$ -
Services and Supplies		\$ 1,126.32	\$ 32,350.00	\$ 49,475.00	\$ 49,475.00	\$ 49,475.00	\$ 49,475.00
Capital							
8494	Bingo Console	\$ -	\$ 15,000.00	\$ -	\$ -	\$ -	\$ -
Capital		\$ -	\$ 15,000.00	\$ -	\$ -	\$ -	\$ -
Revenue Total		\$ (6,116.00)	\$ (30,050.00)	\$ (51,010.00)	\$ (51,010.00)	\$ (51,010.00)	\$ (51,010.00)
Expense Total		\$ 100,469.67	\$ 177,288.00	\$ 163,344.00	\$ 163,344.00	\$ 163,344.00	\$ 163,344.00
Grand Total		\$ (94,353.67)	\$ (147,238.00)	\$ (112,334.00)	\$ (112,334.00)	\$ (112,334.00)	\$ (112,334.00)

Pleasant Valley Recreation & Park District
FY 2022-2023 Budget
Parks (410)

Account	Description	Two Year Prior Actual	One Year Prior Budget	Requested	Proposed	Approved	Adopted
Revenue							
5465	Hill Fire 2018	\$ (219,884.01)	\$ -	\$ -	\$ -	\$ -	\$ -
5506	Park Patrol Citations	\$ (1,100.00)	\$ (2,200.00)	\$ (1,500.00)	\$ (1,500.00)	\$ (1,500.00)	\$ (1,500.00)
5510	Contract Classes-Public Fees	\$ (1,873.00)	\$ -	\$ -	\$ -	\$ -	\$ -
5530	Rental	\$ (156,548.47)	\$ (176,692.00)	\$ (209,525.00)	\$ (209,525.00)	\$ (209,525.00)	\$ (209,525.00)
5535	Cell Tower Revenue	\$ (97,895.88)	\$ (91,704.00)	\$ (100,800.00)	\$ (100,800.00)	\$ (100,800.00)	\$ (100,800.00)
5540	Parking Fees	\$ (11,345.60)	\$ (8,512.00)	\$ (9,600.00)	\$ (9,600.00)	\$ (9,600.00)	\$ (9,600.00)
5563	Staffing Cost Recovery	\$ (210.00)	\$ -	\$ (1,302.00)	\$ (1,302.00)	\$ (1,302.00)	\$ (1,302.00)
5570	Contributions	\$ (41,239.00)	\$ (72,000.00)	\$ (72,000.00)	\$ (72,000.00)	\$ (72,000.00)	\$ (72,000.00)
5575	Other Misc Revenue	\$ (15,844.49)	\$ (36,925.00)	\$ (14,500.00)	\$ (14,500.00)	\$ (14,500.00)	\$ (14,500.00)
5585	Incentive Income	\$ (245.26)	\$ (300.00)	\$ (300.00)	\$ (300.00)	\$ (300.00)	\$ (300.00)
Revenue		\$ (546,185.71)	\$ (388,333.00)	\$ (409,527.00)	\$ (409,527.00)	\$ (409,527.00)	\$ (409,527.00)
Personnel							
6100	Full Time Salaries	\$ 1,117,971.99	\$ 1,232,829.00	\$ 1,335,636.00	\$ 1,335,636.00	\$ 1,335,636.00	\$ 1,335,636.00
6101	Overtime Salaries	\$ 10,094.84	\$ 21,094.00	\$ 24,285.00	\$ 24,285.00	\$ 24,285.00	\$ 24,285.00
6105	Car Allowance	\$ 4,799.86	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00
6108	Cell Phone Allowance	\$ 8,398.00	\$ 9,180.00	\$ 9,720.00	\$ 9,720.00	\$ 9,720.00	\$ 9,720.00
6110	Part-Time Salaries	\$ 112,907.50	\$ 149,981.00	\$ 138,239.00	\$ 138,239.00	\$ 138,239.00	\$ 138,239.00
6120	Retirement	\$ 204,062.06	\$ 223,036.00	\$ 240,203.00	\$ 240,203.00	\$ 240,203.00	\$ 240,203.00
6121	457 Pension	\$ 87.17	\$ -	\$ -	\$ -	\$ -	\$ -
6130	Employee Insurance	\$ 190,577.50	\$ 178,249.00	\$ 191,834.00	\$ 191,834.00	\$ 191,834.00	\$ 191,834.00
6140	Workers Compensation	\$ 94,172.79	\$ 159,926.00	\$ 189,257.00	\$ 189,257.00	\$ 189,257.00	\$ 189,257.00
Personnel		\$ 1,743,071.71	\$ 1,979,095.00	\$ 2,133,974.00	\$ 2,133,974.00	\$ 2,133,974.00	\$ 2,133,974.00
Services and Supplies							
6210	Telephone/Internet	\$ 2,143.38	\$ 4,280.00	\$ 3,360.00	\$ 3,360.00	\$ 3,360.00	\$ 3,360.00
6310	Pool Chemicals	\$ 2,182.96	\$ 8,250.00	\$ 8,250.00	\$ 8,250.00	\$ 8,250.00	\$ 8,250.00
6320	Janitorial Supplies	\$ 41,241.82	\$ 48,408.00	\$ 48,408.00	\$ 48,408.00	\$ 48,408.00	\$ 48,408.00
6321	COVID-19 Supplies	\$ 9,991.47	\$ 5,000.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00
6350	Water Maint & Service	\$ 106.30	\$ 480.00	\$ 480.00	\$ 480.00	\$ 480.00	\$ 480.00
6360	Laundry/Wash Service	\$ -	\$ 180.00	\$ 180.00	\$ 180.00	\$ 180.00	\$ 180.00
6510	Fuel	\$ 46,959.91	\$ 51,600.00	\$ 73,590.00	\$ 73,590.00	\$ 73,590.00	\$ 73,590.00
6520	Vehicle Maintenance	\$ 25,860.64	\$ 35,400.00	\$ 35,400.00	\$ 35,400.00	\$ 35,400.00	\$ 35,400.00
6610	Building Repair	\$ 51,959.70	\$ 88,000.00	\$ 85,500.00	\$ 85,500.00	\$ 85,500.00	\$ 85,500.00
6620	HVAC	\$ 8,065.82	\$ 8,820.00	\$ 8,820.00	\$ 8,820.00	\$ 8,820.00	\$ 8,820.00
6630	Playground Maintenance	\$ 19,649.29	\$ 60,000.00	\$ 40,000.00	\$ 40,000.00	\$ 40,000.00	\$ 40,000.00
6705	Turf Removal	\$ -	\$ 20,000.00	\$ -	\$ -	\$ -	\$ -
6710	Grounds Maintenance	\$ 83,052.90	\$ 86,220.00	\$ 81,420.00	\$ 81,420.00	\$ 81,420.00	\$ 81,420.00
6719	Tree Care	\$ 29,996.85	\$ 30,000.00	\$ 30,000.00	\$ 30,000.00	\$ 30,000.00	\$ 30,000.00
6730	Contracted Pest Control	\$ 860.00	\$ 2,520.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00
6740	Rubbish & Refuse	\$ 69,003.56	\$ 79,346.00	\$ 79,830.00	\$ 79,830.00	\$ 79,830.00	\$ 79,830.00
6750	Vandalism/Theft	\$ 265.91	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00
6810	Memberships	\$ -	\$ 550.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00
6910	Office Supplies	\$ -	\$ 300.00	\$ 300.00	\$ 300.00	\$ 300.00	\$ 300.00
6940	Printing Charges	\$ 2,314.18	\$ 900.00	\$ 450.00	\$ 450.00	\$ 450.00	\$ 450.00
7020	Fire & Safety Insp Fees	\$ 2,239.93	\$ 2,400.00	\$ 2,975.00	\$ 2,975.00	\$ 2,975.00	\$ 2,975.00
7030	Permit & Licensing Fees	\$ 1,740.26	\$ 2,300.00	\$ 2,300.00	\$ 2,300.00	\$ 2,300.00	\$ 2,300.00
7040	State License Fee	\$ 657.50	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
7150	Security Services	\$ -	\$ 750.00	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00
7180	Business Services	\$ 4,016.76	\$ 3,300.00	\$ 20,100.00	\$ 20,100.00	\$ 20,100.00	\$ 20,100.00
7210	Subscriptions	\$ -	\$ 480.00	\$ 120.00	\$ 120.00	\$ 120.00	\$ 120.00
7310	Rents & Leases - Equip	\$ 2,873.23	\$ 12,000.00	\$ 12,000.00	\$ 12,000.00	\$ 12,000.00	\$ 12,000.00
7440	Sporting Goods	\$ 1,722.25	\$ 2,400.00	\$ 2,600.00	\$ 2,600.00	\$ 2,600.00	\$ 2,600.00
7500	Small Tools	\$ 4,873.00	\$ 6,000.00	\$ 6,000.00	\$ 6,000.00	\$ 6,000.00	\$ 6,000.00
7510	Safety Supplies	\$ 84.88	\$ 600.00	\$ 300.00	\$ 300.00	\$ 300.00	\$ 300.00
7610	Uniform Allowance	\$ 5,106.85	\$ 7,510.00	\$ 8,500.00	\$ 8,500.00	\$ 8,500.00	\$ 8,500.00
7620	Safety Clothing	\$ 2,757.49	\$ 4,764.00	\$ 5,404.00	\$ 5,404.00	\$ 5,404.00	\$ 5,404.00
7710	Conference&Seminar Staff	\$ 1,923.65	\$ 4,200.00	\$ 7,350.00	\$ 7,350.00	\$ 7,350.00	\$ 7,350.00
7720	Conference&Seminar Travel Exp	\$ -	\$ 3,974.00	\$ 250.00	\$ 250.00	\$ 250.00	\$ 250.00
7760	Tuition/Book Reimbursemetn	\$ -	\$ -	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00
7810	Utilities - Gas	\$ 26,097.93	\$ 30,414.00	\$ 38,740.00	\$ 38,740.00	\$ 38,740.00	\$ 38,740.00
7820	Utilities - Water	\$ 888,333.71	\$ 899,999.00	\$ 910,143.00	\$ 910,143.00	\$ 910,143.00	\$ 910,143.00
7830	Utilities - Electric	\$ 155,202.20	\$ 210,000.00	\$ 217,575.00	\$ 217,575.00	\$ 217,575.00	\$ 217,575.00
7840	Airport Assessment Exp	\$ 842.00	\$ 14,000.00	\$ 14,000.00	\$ 14,000.00	\$ 14,000.00	\$ 14,000.00
7920	Meals for Staff Training	\$ -	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00
7930	Employee Morale	\$ 64.24	\$ -	\$ -	\$ -	\$ -	\$ -
8112	Classes Refund 2020	\$ 635.00	\$ -	\$ -	\$ -	\$ -	\$ -
Services and Supplies		\$ 1,492,825.57	\$ 1,737,345.00	\$ 1,755,445.00	\$ 1,755,445.00	\$ 1,755,445.00	\$ 1,755,445.00

**Pleasant Valley Recreation & Park District
FY 2022-2023 Budget
Parks (410)**

Account	Description	Two Year Prior Actual	One Year Prior Budget	Requested	Proposed	Approved	Adopted
Capital							
8400	Capital	\$ -	\$ -	\$ 645,000.00	\$ 765,000.00	\$ 765,000.00	\$ 765,000.00
8420	Equip/Facility Replacement	\$ 269.42	\$ 64,730.00	\$ 90,000.00	\$ 90,000.00	\$ 90,000.00	\$ 90,000.00
8468	Community Center Marquee	\$ 3,997.52	\$ -	\$ -	\$ -	\$ -	\$ -
8475	Turf Grinder	\$ 14,366.14	\$ -	\$ -	\$ -	\$ -	\$ -
8476	Pitts Ranch BB Crt Repaint	\$ 7,950.00	\$ -	\$ -	\$ -	\$ -	\$ -
8477	PV Fields Painting West End	\$ 8,830.00	\$ -	\$ -	\$ -	\$ -	\$ -
8481	HVAC Administration Bldg	\$ 13,200.00	\$ -	\$ -	\$ -	\$ -	\$ -
8482	HVAC for Room #6	\$ 10,876.76	\$ -	\$ -	\$ -	\$ -	\$ -
8483	ECAA Loan-Lighting Project	\$ -	\$ 190,000.00	\$ -	\$ -	\$ -	\$ -
8485	HVAC Conference Room	\$ -	\$ 15,000.00	\$ -	\$ -	\$ -	\$ -
8486	Pool Vacuum	\$ -	\$ 6,000.00	\$ -	\$ -	\$ -	\$ -
8487	Springville Parking Lot	\$ -	\$ 80,000.00	\$ -	\$ -	\$ -	\$ -
8488	Mission Oaks Parking Lot	\$ -	\$ 100,000.00	\$ -	\$ -	\$ -	\$ -
8489	Tennis Court Lighting	\$ -	\$ 140,000.00	\$ -	\$ -	\$ -	\$ -
8491	Senior Center Carpeting	\$ -	\$ 15,000.00	\$ -	\$ -	\$ -	\$ -
8492	Sr Ctr Upgrade to Sound Board	\$ -	\$ 15,000.00	\$ -	\$ -	\$ -	\$ -
8495	Turf Sweeper	\$ -	\$ 8,190.00	\$ -	\$ -	\$ -	\$ -
Capital		\$ 59,489.84	\$ 633,920.00	\$ 735,000.00	\$ 855,000.00	\$ 855,000.00	\$ 855,000.00
Revenue Total		\$ (546,185.71)	\$ (388,333.00)	\$ (409,527.00)	\$ (409,527.00)	\$ (409,527.00)	\$ (409,527.00)
Expense Total		\$ 3,235,897.28	\$ 3,716,440.00	\$ 3,889,419.00	\$ 3,889,419.00	\$ 3,889,419.00	\$ 3,889,419.00
Grand Total		\$ (2,689,711.57)	\$ (3,328,107.00)	\$ (3,479,892.00)	\$ (3,479,892.00)	\$ (3,479,892.00)	\$ (3,479,892.00)
Expense and Capital		\$ 3,295,387.12	\$ 4,350,360.00	\$ 4,624,419.00	\$ 4,744,419.00	\$ 4,744,419.00	\$ 4,744,419.00

Pleasant Valley Recreation & Park District
FY 2022-2023 Budget
Recreation Administration (503)

Account	Description	Two Year Prior Actual	One Year Prior Budget	Requested	Proposed	Approved	Adopted
Revenue							
5511	Public Fees	\$ (1,110.00)	\$ (27,795.00)	\$ (27,295.00)	\$ (27,295.00)	\$ (27,295.00)	\$ (27,295.00)
5555	Activity Guide Revenue	\$ (1,750.00)	\$ (10,000.00)	\$ (10,000.00)	\$ (10,000.00)	\$ (10,000.00)	\$ (10,000.00)
5558	Sponsorships/Donations	\$ (4,065.00)	\$ (1,000.00)	\$ (21,250.00)	\$ (21,250.00)	\$ (21,250.00)	\$ (21,250.00)
5563	Staffing Cost Recovery	\$ (8,992.00)	\$ (1,250.00)	\$ -	\$ -	\$ -	\$ -
5564	Special Event Permits	\$ (600.00)	\$ -	\$ -	\$ -	\$ -	\$ -
Revenue		\$ (16,517.00)	\$ (40,045.00)	\$ (58,545.00)	\$ (58,545.00)	\$ (58,545.00)	\$ (58,545.00)
Personnel							
6100	Full Time Salaries	\$ 203,159.48	\$ 199,745.00	\$ 189,048.00	\$ 189,048.00	\$ 189,048.00	\$ 189,048.00
6108	Cell Phone Allowance	\$ 780.00	\$ 780.00	\$ 780.00	\$ 780.00	\$ 780.00	\$ 780.00
6110	Part-Time Salaries	\$ 885.50	\$ 18,230.00	\$ 30,209.00	\$ 30,209.00	\$ 30,209.00	\$ 30,209.00
6120	Retirement	\$ 30,856.01	\$ 31,114.00	\$ 29,082.00	\$ 29,082.00	\$ 29,082.00	\$ 29,082.00
6130	Employee Insurance	\$ 16,193.85	\$ 14,956.00	\$ 30,601.00	\$ 30,601.00	\$ 30,601.00	\$ 30,601.00
6140	Workers Compensation	\$ 3,381.72	\$ 5,470.00	\$ 6,139.00	\$ 6,139.00	\$ 6,139.00	\$ 6,139.00
Personnel		\$ 255,256.56	\$ 270,295.00	\$ 285,859.00	\$ 285,859.00	\$ 285,859.00	\$ 285,859.00
Services and Supplies							
6330	Kitchen Supplies	\$ -	\$ 100.00	\$ 300.00	\$ 300.00	\$ 300.00	\$ 300.00
6340	Food Supplies	\$ -	\$ -	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00
6360	Laundry/Wash Service	\$ 178.00	\$ 700.00	\$ 1,040.00	\$ 1,040.00	\$ 1,040.00	\$ 1,040.00
6530	Office Equipment Maintenance	\$ 116.89	\$ -	\$ -	\$ -	\$ -	\$ -
6810	Memberships	\$ -	\$ -	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00
6910	Office Supplies	\$ 96.85	\$ 1,250.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00
6920	Postage Expense	\$ -	\$ 11,200.00	\$ 16,900.00	\$ 16,900.00	\$ 16,900.00	\$ 16,900.00
7020	Fire & Safety Insp Fees	\$ -	\$ 1,400.00	\$ 1,750.00	\$ 1,750.00	\$ 1,750.00	\$ 1,750.00
7030	Permit & Licensing Fees	\$ -	\$ 2,850.00	\$ 3,050.00	\$ 3,050.00	\$ 3,050.00	\$ 3,050.00
7100	Professional Services	\$ -	\$ 1,000.00	\$ 12,001.00	\$ 12,001.00	\$ 12,001.00	\$ 12,001.00
7115	Typeset and Print Services	\$ -	\$ 29,000.00	\$ 36,000.00	\$ 36,000.00	\$ 36,000.00	\$ 36,000.00
7140	Medical & Health Svcs (HR)	\$ -	\$ 1,500.00	\$ 6,250.00	\$ 6,250.00	\$ 6,250.00	\$ 6,250.00
7150	Security Services	\$ -	\$ 650.00	\$ 1,475.00	\$ 1,475.00	\$ 1,475.00	\$ 1,475.00
7160	Entertainment Services	\$ -	\$ 1,400.00	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00
7180	Business Services	\$ 378.00	\$ 900.00	\$ 5,650.00	\$ 5,650.00	\$ 5,650.00	\$ 5,650.00
7210	Subscriptions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
7310	Rents & Leases - Equip	\$ (132.40)	\$ 2,000.00	\$ 9,300.00	\$ 9,300.00	\$ 9,300.00	\$ 9,300.00
7320	Bldg/Field Leases & Rental	\$ 190.00	\$ 60.00	\$ 60.00	\$ 60.00	\$ 60.00	\$ 60.00
7420	Supplies	\$ 1,493.98	\$ 14,435.00	\$ 10,700.00	\$ 10,700.00	\$ 10,700.00	\$ 10,700.00
7610	Uniform Allowance	\$ -	\$ 1,560.00	\$ 1,350.00	\$ 1,350.00	\$ 1,350.00	\$ 1,350.00
7700	Transportation and Travel	\$ -	\$ 1,500.00	\$ 600.00	\$ 600.00	\$ 600.00	\$ 600.00
7710	Conference&Seminar Staff	\$ -	\$ 5,970.00	\$ 6,000.00	\$ 6,000.00	\$ 6,000.00	\$ 6,000.00
7720	Conference&Seminar Travel Exp	\$ -	\$ 3,500.00	\$ 18,390.00	\$ 18,390.00	\$ 18,390.00	\$ 18,390.00
7730	Private Vehicle Mileage	\$ 82.94	\$ 1,416.00	\$ 3,540.00	\$ 3,540.00	\$ 3,540.00	\$ 3,540.00
7910	Awards and Certificates	\$ -	\$ -	\$ 1,300.00	\$ 1,300.00	\$ 1,300.00	\$ 1,300.00
Services and Supplies		\$ 2,404.26	\$ 82,391.00	\$ 146,506.00	\$ 146,506.00	\$ 146,506.00	\$ 146,506.00
Revenue Total		\$ (16,517.00)	\$ (40,045.00)	\$ (58,545.00)	\$ (58,545.00)	\$ (58,545.00)	\$ (58,545.00)
Expense Total		\$ 257,660.82	\$ 352,686.00	\$ 432,365.00	\$ 432,365.00	\$ 432,365.00	\$ 432,365.00
Grand Total		\$ (241,143.82)	\$ (312,641.00)	\$ (373,820.00)	\$ (373,820.00)	\$ (373,820.00)	\$ (373,820.00)

Pleasant Valley Recreation & Park District
FY 2022-2023 Budget
Administration (505)

Account	Description	Two Year Prior Actual	One Year Prior Budget	Requested	Proposed	Approved	Adopted
Revenue							
5530	Rental	\$ (50.00)	\$ -	\$ -	\$ -	\$ -	\$ -
5575	Other Misc Revenue	\$ (21,777.13)	\$ (267,955.00)	\$ (18,900.00)	\$ (18,900.00)	\$ (18,900.00)	\$ (18,900.00)
5576	Credit Card Processing Fee	\$ (172.84)	\$ -	\$ -	\$ -	\$ -	\$ -
5580	Cash Over/Under	\$ (166.00)	\$ -	\$ -	\$ -	\$ -	\$ -
5605	Reimb-Needs Assessment/LPA	\$ (17,610.38)	\$ -	\$ -	\$ -	\$ -	\$ -
Revenue		\$ (39,776.35)	\$ (267,955.00)	\$ (18,900.00)	\$ (18,900.00)	\$ (18,900.00)	\$ (18,900.00)
Personnel							
6100	Full Time Salaries	\$ 691,229.38	\$ 790,564.00	\$ 867,198.00	\$ 867,198.00	\$ 867,198.00	\$ 867,198.00
6101	Overtime Salaries	\$ 157.85	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00
6105	Car Allowance	\$ 5,999.76	\$ 6,000.00	\$ 6,000.00	\$ 6,000.00	\$ 6,000.00	\$ 6,000.00
6108	Cell Phone Allowance	\$ 3,090.00	\$ 3,705.00	\$ 3,822.00	\$ 3,822.00	\$ 3,822.00	\$ 3,822.00
6110	Part-Time Salaries	\$ 20,795.00	\$ 33,075.00	\$ 43,075.00	\$ 43,075.00	\$ 43,075.00	\$ 43,075.00
6120	Retirement	\$ 112,394.34	\$ 135,151.00	\$ 138,382.00	\$ 138,382.00	\$ 138,382.00	\$ 138,382.00
6121	457 Pension	\$ 6,888.32	\$ 7,000.00	\$ 7,000.00	\$ 7,000.00	\$ 7,000.00	\$ 7,000.00
6125	Deferred Compensation	\$ 4,750.10	\$ 4,752.00	\$ 4,895.00	\$ 4,895.00	\$ 4,895.00	\$ 4,895.00
6130	Employee Insurance	\$ 95,686.52	\$ 121,010.00	\$ 117,988.00	\$ 117,988.00	\$ 117,988.00	\$ 117,988.00
6140	Workers Compensation	\$ 5,170.68	\$ 8,012.00	\$ 9,398.00	\$ 9,398.00	\$ 9,398.00	\$ 9,398.00
6150	Unemployment Insurance	\$ 29,026.50	\$ 40,000.00	\$ 10,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00
6160	Loan - Pension Obligation	\$ 24,742.00	\$ 264,218.00	\$ 132,893.00	\$ 132,893.00	\$ 132,893.00	\$ 132,893.00
6170	PERS Unfunded Liability	\$ 434,065.00	\$ 516,970.00	\$ 565,994.00	\$ 565,994.00	\$ 565,994.00	\$ 565,994.00
Personnel		\$ 1,433,995.45	\$ 1,932,957.00	\$ 1,909,145.00	\$ 1,914,145.00	\$ 1,914,145.00	\$ 1,914,145.00
Services and Supplies							
6210	Telephone/Internet	\$ 18,174.63	\$ 18,728.00	\$ 19,772.00	\$ 19,772.00	\$ 19,772.00	\$ 19,772.00
6220	Internet Services	\$ 25,366.00	\$ 36,862.00	\$ 61,125.00	\$ 61,125.00	\$ 61,125.00	\$ 61,125.00
6230	IT Infrastructure	\$ 987.86	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
6240	Computer Hardware/Software	\$ 9,688.16	\$ 12,050.00	\$ 60,534.00	\$ 60,534.00	\$ 60,534.00	\$ 60,534.00
6321	COVID - Supplies	\$ 294.37	\$ 100.00	\$ -	\$ -	\$ -	\$ -
6350	Water Maint & Service	\$ 833.75	\$ 785.00	\$ 785.00	\$ 785.00	\$ 785.00	\$ 785.00
6410	Insurance Liability	\$ 208,084.00	\$ 236,698.00	\$ 284,038.00	\$ 284,038.00	\$ 284,038.00	\$ 284,038.00
6727	Fee Schedule	\$ -	\$ 16,397.00	\$ -	\$ -	\$ -	\$ -
6810	Memberships	\$ 12,185.00	\$ 13,740.00	\$ 14,527.00	\$ 14,527.00	\$ 14,527.00	\$ 14,527.00
6910	Office Supplies	\$ 5,272.22	\$ 11,159.00	\$ 21,120.00	\$ 21,120.00	\$ 21,120.00	\$ 21,120.00
6920	Postage Expense	\$ 1,052.40	\$ 1,500.00	\$ 1,740.00	\$ 1,740.00	\$ 1,740.00	\$ 1,740.00
6930	Advertising Expense	\$ 1,055.00	\$ 1,740.00	\$ 2,740.00	\$ 2,740.00	\$ 2,740.00	\$ 2,740.00
6940	Printing Charges	\$ 9,000.49	\$ 13,223.00	\$ 8,485.00	\$ 8,485.00	\$ 8,485.00	\$ 8,485.00
6950	Registration Fees	\$ 30,290.31	\$ 47,732.00	\$ 3,920.00	\$ 3,920.00	\$ 3,920.00	\$ 3,920.00
6960	Approp Redev/Collection Fees	\$ 509,538.40	\$ 545,454.00	\$ 552,000.00	\$ 552,000.00	\$ 552,000.00	\$ 552,000.00
6980	Minor Furn Fixture & Equip	\$ 1,121.45	\$ 1,137.00	\$ 1,137.00	\$ 1,137.00	\$ 1,137.00	\$ 1,137.00
7010	Fingerprint Fees (HR)	\$ 346.00	\$ 2,640.00	\$ 3,360.00	\$ 3,360.00	\$ 3,360.00	\$ 3,360.00
7100	Professional Services	\$ 7,000.00	\$ 80,550.00	\$ 135,500.00	\$ 135,500.00	\$ 135,500.00	\$ 135,500.00
7110	Legal Services	\$ 47,226.36	\$ 90,000.00	\$ 90,000.00	\$ 90,000.00	\$ 90,000.00	\$ 90,000.00
7120	Instructor Services	\$ 9.99	\$ -	\$ -	\$ -	\$ -	\$ -
7125	PERS Admin Fees	\$ 1,573.86	\$ 2,128.00	\$ 2,200.00	\$ 2,200.00	\$ 2,200.00	\$ 2,200.00
7130	Audit Services	\$ 12,760.00	\$ 20,275.00	\$ 20,875.00	\$ 20,875.00	\$ 20,875.00	\$ 20,875.00
7140	Medical & Health Svcs (HR)	\$ 1,275.00	\$ 4,920.00	\$ 5,920.00	\$ 5,920.00	\$ 5,920.00	\$ 5,920.00
7150	Security Services	\$ 2,932.50	\$ 2,747.00	\$ 2,747.00	\$ 2,747.00	\$ 2,747.00	\$ 2,747.00
7180	Business Services	\$ 76,809.17	\$ 59,440.00	\$ 72,699.00	\$ 72,699.00	\$ 72,699.00	\$ 72,699.00
7210	Subscriptions	\$ 1,423.98	\$ 3,068.00	\$ 2,255.00	\$ 2,255.00	\$ 2,255.00	\$ 2,255.00
7460	Training Supplies	\$ 499.71	\$ 800.00	\$ 1,070.00	\$ 1,070.00	\$ 1,070.00	\$ 1,070.00
7510	Safety Supplies	\$ 125.30	\$ 300.00	\$ 1,755.00	\$ 1,755.00	\$ 1,755.00	\$ 1,755.00
7610	Uniform Allowance	\$ -	\$ 1,000.00	\$ 600.00	\$ 600.00	\$ 600.00	\$ 600.00
7710	Conference&Seminar Staff	\$ 4,969.68	\$ 13,026.00	\$ 17,241.00	\$ 17,241.00	\$ 17,241.00	\$ 17,241.00
7715	Conference&Seminar Board	\$ -	\$ 4,450.00	\$ 4,450.00	\$ 4,450.00	\$ 4,450.00	\$ 4,450.00
7720	Conference&Seminar Travel Exp	\$ -	\$ 6,244.00	\$ 8,309.00	\$ 8,309.00	\$ 8,309.00	\$ 8,309.00
7725	Out of Town Travel Board	\$ -	\$ 2,420.00	\$ 2,420.00	\$ 2,420.00	\$ 2,420.00	\$ 2,420.00
7730	Private Vehicle Mileage	\$ 35.42	\$ 901.00	\$ 908.00	\$ 908.00	\$ 908.00	\$ 908.00
7910	Awards and Certificates	\$ 239.41	\$ 530.00	\$ 740.00	\$ 740.00	\$ 740.00	\$ 740.00
7920	Meals for Staff Training	\$ 1,395.96	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00
7930	Employee Morale	\$ 80.00	\$ 5,500.00	\$ 5,500.00	\$ 5,500.00	\$ 5,500.00	\$ 5,500.00
7971	Reserve - Computer Fleet	\$ -	\$ -	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
7973	Reserve Dry Period	\$ -	\$ 36,645.00	\$ 65,203.00	\$ 65,203.00	\$ 65,203.00	\$ 65,203.00
7974	Reserve - Capital Improvements	\$ -	\$ -	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00
7975	Reserve Repair/Oper/Admin	\$ -	\$ 100,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00
7976	Reserve - Compensated Absences	\$ -	\$ 75,000.00	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00
8112	Admin Fee/CC Refund 2020	\$ 357.00	\$ -	\$ -	\$ -	\$ -	\$ -
Services and Supplies		\$ 992,003.38	\$ 1,474,889.00	\$ 1,550,675.00	\$ 1,550,675.00	\$ 1,550,675.00	\$ 1,550,675.00

Pleasant Valley Recreation & Park District
FY 2022-2023 Budget
Administration (505)

Account	Description	Two Year Prior Actual	One Year Prior Budget	Requested	Proposed	Approved	Adopted
Capital							
8474	Switches and Servers	\$ 29,642.96	\$ -	\$ -	\$ -	\$ -	\$ -
8496	ADA Transition Plan	\$ -	\$ 82,880.00	\$ -	\$ -	\$ -	\$ -
Capital		\$ 29,642.96	\$ 82,880.00	\$ -	\$ -	\$ -	\$ -
Revenue Total		\$ (39,776.35)	\$ (267,955.00)	\$ (18,900.00)	\$ (18,900.00)	\$ (18,900.00)	\$ (18,900.00)
Expense Total		\$ 2,425,998.83	\$ 3,407,846.00	\$ 3,459,820.00	\$ 3,464,820.00	\$ 3,464,820.00	\$ 3,464,820.00
Grand Total		\$ (2,386,222.48)	\$ (3,139,891.00)	\$ (3,440,920.00)	\$ (3,445,920.00)	\$ (3,445,920.00)	\$ (3,445,920.00)
Expenses and Capital		\$ 2,455,641.79	\$ 3,490,726.00	\$ 3,459,820.00	\$ 3,464,820.00	\$ 3,464,820.00	\$ 3,464,820.00

Pleasant Valley Recreation & Park District
FY 2022-2023 Budget
Grants (520)

Account	Description	Two Year Prior Actual	One Year Prior Budget	Requested	Proposed	Approved	Adopted
Revenue							
5563	Staffing Cost Recovery	\$ (13,099.00)	\$ (18,000.00)	\$ (18,000.00)	\$ (18,000.00)	\$ (18,000.00)	\$ (18,000.00)
5573	Grants	\$ (7,176.00)	\$ -	\$ -	\$ -	\$ -	\$ -
Revenue		\$ (20,275.00)	\$ (18,000.00)	\$ (18,000.00)	\$ (18,000.00)	\$ (18,000.00)	\$ (18,000.00)
Personnel							
6100	Full Time Salaries	\$ 6,560.83	\$ 23,954.00	\$ 12,896.00	\$ 12,896.00	\$ 12,896.00	\$ 12,896.00
6108	Cell Phone Allowance	\$ -	\$ 195.00	\$ 78.00	\$ 78.00	\$ 78.00	\$ 78.00
6110	Part-Time Salaries	\$ 262.85	\$ 1,740.00	\$ 2,325.00	\$ 2,325.00	\$ 2,325.00	\$ 2,325.00
6120	Retirement	\$ 1,019.85	\$ 8,361.00	\$ 1,990.00	\$ 1,990.00	\$ 1,990.00	\$ 1,990.00
6130	Employee Insurance	\$ 709.14	\$ 11,163.00	\$ 2,584.00	\$ 2,584.00	\$ 2,584.00	\$ 2,584.00
6140	Workers Compensation	\$ 114.45	\$ 1,916.00	\$ 244.00	\$ 244.00	\$ 244.00	\$ 244.00
Personnel		\$ 8,667.12	\$ 47,329.00	\$ 20,117.00	\$ 20,117.00	\$ 20,117.00	\$ 20,117.00
Services and Supplies							
6340	Food Supplies	\$ -	\$ 1,000.00	\$ -	\$ -	\$ -	\$ -
6930	Advertising Expense	\$ -	\$ 750.00	\$ 750.00	\$ 750.00	\$ 750.00	\$ 750.00
7030	Permit & Licensing Fees	\$ -	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00
7120	Instructor Services	\$ 1,175.00	\$ 1,800.00	\$ 1,800.00	\$ 1,800.00	\$ 1,800.00	\$ 1,800.00
7160	Entertainment Services	\$ -	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
7180	Business Services	\$ -	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00
7310	Rents & Leases - Equip	\$ -	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00
7410	Event Supplies	\$ 627.35	\$ 1,920.00	\$ 420.00	\$ 420.00	\$ 420.00	\$ 420.00
7610	Uniform Allowance	\$ -	\$ 150.00	\$ -	\$ -	\$ -	\$ -
7730	Private Vehicle Mileage	\$ -	\$ 1,575.00	\$ 77.00	\$ 77.00	\$ 77.00	\$ 77.00
Services and Supplies		\$ 1,802.35	\$ 10,395.00	\$ 6,247.00	\$ 6,247.00	\$ 6,247.00	\$ 6,247.00
Revenue Total							
Revenue Total		\$ (20,275.00)	\$ (18,000.00)	\$ (18,000.00)	\$ (18,000.00)	\$ (18,000.00)	\$ (18,000.00)
Expense Total							
Expense Total		\$ 10,469.47	\$ 57,724.00	\$ 26,364.00	\$ 26,364.00	\$ 26,364.00	\$ 26,364.00
Grand Total							
Grand Total		\$ 9,805.53	\$ (39,724.00)	\$ (8,364.00)	\$ (8,364.00)	\$ (8,364.00)	\$ (8,364.00)

**Pleasant Valley Recreation & Park District
FY 2022-2023 Budget
Assessment District Fund 20**

Account	Description	Two Year Prior Actual	One Year Prior Budget	Requested	Proposed	Approved	Adopted
Revenue							
5110	Tax Apport - Cur Year Secured	\$ (23,696.70)	\$ -	\$ -	\$ -	\$ -	\$ -
5130	Tax Apport - Prior Year Sec	\$ -	\$ -	\$ (238.00)	\$ (238.00)	\$ (238.00)	\$ (238.00)
5310	Interest Earnings	\$ (291.44)	\$ (238.00)	\$ -	\$ -	\$ -	\$ -
5500	Assessment Revenue	\$ (1,178,293.51)	\$ (1,209,566.00)	\$ (1,251,393.00)	\$ (1,251,393.00)	\$ (1,251,393.00)	\$ (1,251,393.00)
Revenue		\$ (1,202,281.65)	\$ (1,209,804.00)	\$ (1,251,631.00)	\$ (1,251,631.00)	\$ (1,251,631.00)	\$ (1,251,631.00)
Personnel							
6100	Full Time Salaries	\$ 18,076.02	\$ 20,831.00	\$ 21,048.00	\$ 21,048.00	\$ 21,048.00	\$ 21,048.00
6108	Cell Phone Allowance	\$ -	\$ 178.00	\$ 162.00	\$ 162.00	\$ 162.00	\$ 162.00
6120	Retirement	\$ 3,108.00	\$ 3,568.00	\$ 3,601.00	\$ 3,601.00	\$ 3,601.00	\$ 3,601.00
6130	Employee Insurance	\$ 4,726.41	\$ 3,749.00	\$ 4,386.00	\$ 4,386.00	\$ 4,386.00	\$ 4,386.00
6140	Workers Compensation	\$ 1,873.67	\$ 2,483.00	\$ 2,787.00	\$ 2,787.00	\$ 2,787.00	\$ 2,787.00
Personnel		\$ 27,784.10	\$ 30,809.00	\$ 31,984.00	\$ 31,984.00	\$ 31,984.00	\$ 31,984.00
Services and Supplies							
6709	Incidental Costs - Assess	\$ 18,620.01	\$ 30,094.00	\$ 19,444.00	\$ 19,444.00	\$ 19,444.00	\$ 19,444.00
6710	Grounds Maintenance	\$ -	\$ 15,000.00	\$ -	\$ -	\$ -	\$ -
6719	Tree Care	\$ 67,500.00	\$ 67,500.00	\$ 88,502.00	\$ 88,502.00	\$ 88,502.00	\$ 88,502.00
6720	Contracted LS Services	\$ 488,631.08	\$ 465,913.00	\$ 516,049.00	\$ 516,049.00	\$ 516,049.00	\$ 516,049.00
6722	Park Amenities - Assess	\$ 15,956.43	\$ 17,500.00	\$ 34,000.00	\$ 34,000.00	\$ 34,000.00	\$ 34,000.00
6950	Registration Fees	\$ -	\$ 70.00	\$ 70.00	\$ 70.00	\$ 70.00	\$ 70.00
6960	Approp Redev/Collection Fees	\$ 2,891.08	\$ 3,500.00	\$ 3,500.00	\$ 3,500.00	\$ 3,500.00	\$ 3,500.00
7950	COP Debt - PV Fields	\$ 525,559.21	\$ 529,760.00	\$ 529,760.00	\$ 529,760.00	\$ 529,760.00	\$ 529,760.00
Services and Supplies		\$ 1,119,157.81	\$ 1,129,337.00	\$ 1,191,325.00	\$ 1,191,325.00	\$ 1,191,325.00	\$ 1,191,325.00
Revenue Total		\$ (1,202,281.65)	\$ (1,209,804.00)	\$ (1,251,631.00)	\$ (1,251,631.00)	\$ (1,251,631.00)	\$ (1,251,631.00)
Expense Total		\$ 1,146,941.91	\$ 1,160,146.00	\$ 1,223,309.00	\$ 1,223,309.00	\$ 1,223,309.00	\$ 1,223,309.00
Grand Total		\$ 55,339.74	\$ 49,658.00	\$ 28,322.00	\$ 28,322.00	\$ 28,322.00	\$ 28,322.00

**Pleasant Valley Recreation & Park District
FY 2022-2023 Budget
Park Dedication Fees (Fund 30 Quimby)**

Account	Description	Two Year Prior Actual	One Year Prior Budget	Requested	Proposed	Approved	Adopted
Revenue							
5310	Interest Earnings	\$ (35,233.24)	\$ (10,013.00)	\$ (5,125.00)	\$ (5,125.00)	\$ (5,125.00)	\$ (5,125.00)
5320	MBS Interest Earnings	\$ (7,320.00)	\$ -	\$ -	\$ -	\$ -	\$ -
5400	Park Dedication Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Revenue		\$ (42,553.24)	\$ (10,013.00)	\$ (5,125.00)	\$ (5,125.00)	\$ (5,125.00)	\$ (5,125.00)
Services and Supplies							
6930	Advertising Expense	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
6950	Registration Fees	\$ 12.00	\$ -	\$ -	\$ -	\$ -	\$ -
8111	Refunds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Services and Supplies		\$ 12.00	\$ -	\$ -	\$ -	\$ -	\$ -
Capital							
8400	Capital	\$ -	\$ -	\$ 1,400,000.00	\$ 1,400,000.00	\$ 1,400,000.00	\$ 1,400,000.00
8464	Arneill Ranch Park Renovation	\$ 93,593.54	\$ 1,477,651.00	\$ -	\$ -	\$ -	\$ -
8469	PVAC Restroom & Shower	\$ 35,249.13	\$ -	\$ -	\$ -	\$ -	\$ -
8475	Turf Grinder	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
8478	Fertilizer Injector System	\$ 50,788.90	\$ -	\$ -	\$ -	\$ -	\$ -
8480	Community Center Kitchen	\$ 20,652.84	\$ 273,262.00	\$ -	\$ -	\$ -	\$ -
8493	Pickleball Sports Complex	\$ -	\$ 1,400,000.00	\$ -	\$ -	\$ -	\$ -
Capital		\$ 200,284.41	\$ 3,150,913.00	\$ 1,400,000.00	\$ 1,400,000.00	\$ 1,400,000.00	\$ 1,400,000.00
Revenue Total		\$ (42,553.24)	\$ (10,013.00)	\$ (5,125.00)	\$ (5,125.00)	\$ (5,125.00)	\$ (5,125.00)
Expense Total		\$ 12.00	\$ -	\$ -	\$ -	\$ -	\$ -
Grand Total		\$ 42,541.24	\$ 10,013.00	\$ 5,125.00	\$ 5,125.00	\$ 5,125.00	\$ 5,125.00
Expenses and Capital		\$ 200,296.41	\$ 3,150,913.00	\$ 1,400,000.00	\$ 1,400,000.00	\$ 1,400,000.00	\$ 1,400,000.00

Pleasant Valley Recreation & Park District
FY 2022-2023 Budget
Park Impact Fees (Fund 40)

Account	Description	Two Year Prior Actual	One Year Prior Budget	Requested	Proposed	Approved	Adopted
Revenue							
5310	Interest Earnings	\$ -	\$ -	\$ (66.00)	\$ (66.00)	\$ (66.00)	\$ (66.00)
5450	Park Impact Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Revenue		\$ -	\$ -	\$ (66.00)	\$ (66.00)	\$ (66.00)	\$ (66.00)
Revenue Total		\$ -	\$ -	\$ (66.00)	\$ (66.00)	\$ (66.00)	\$ (66.00)
Expense Total		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Grand Total		\$ -	\$ -	\$ (66.00)	\$ (66.00)	\$ (66.00)	\$ (66.00)

Pleasant Valley Recreation & Park District
FY 2022-2023 Budget
Community Development Block Grant (Fund 50 CDBG)

Account	Description	Two Year Prior Actual	One Year Prior Budget	Requested	Proposed	Approved	Adopted
Revenue							
5563	Staffing Cost Recovery	\$ -	\$ -	\$ (42,428.00)	\$ (42,428.00)	\$ (42,428.00)	\$ (42,428.00)
5577	CDBG - Food Share	\$ -	\$ (42,428.33)	\$ -	\$ -	\$ -	\$ -
Revenue		\$ -	\$ (42,428.33)	\$ (42,428.00)	\$ (42,428.00)	\$ (42,428.00)	\$ (42,428.00)
Personnel							
6100	Full Time Salaries	\$ -	\$ 37,587.00	\$ 34,508.00	\$ 34,508.00	\$ 34,508.00	\$ 34,508.00
6110	Part-Time Salaries	\$ -	\$ 5,000.00	\$ 5,333.00	\$ 5,333.00	\$ 5,333.00	\$ 5,333.00
6120	Retirement	\$ -	\$ 2,853.00	\$ -	\$ -	\$ -	\$ -
6130	Employee Insurance	\$ -	\$ 3,591.00	\$ -	\$ -	\$ -	\$ -
6140	Workers Compensation	\$ -	\$ 1,082.00	\$ -	\$ -	\$ -	\$ -
6910	Office Supplies	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Personnel		\$ -	\$ 50,113.00	\$ 39,841.00	\$ 39,841.00	\$ 39,841.00	\$ 39,841.00
Services and Supplies							
7410	Event Supplies	\$ -	\$ 1,500.00	\$ -	\$ -	\$ -	\$ -
7610	Uniform Allowance	\$ -	\$ 150.00	\$ -	\$ -	\$ -	\$ -
7730	Private Vehicle Mileage	\$ -	\$ 1,500.00	\$ -	\$ -	\$ -	\$ -
Services and Supplies		\$ -	\$ 3,150.00	\$ -	\$ -	\$ -	\$ -
Revenue Total		\$ -	\$ (42,428.33)	\$ (42,428.00)	\$ (42,428.00)	\$ (42,428.00)	\$ (42,428.00)
Expense Total		\$ -	\$ 53,263.00	\$ 39,841.00	\$ 39,841.00	\$ 39,841.00	\$ 39,841.00
Grand Total		\$ -	\$ (10,834.67)	\$ 2,587.00	\$ 2,587.00	\$ 2,587.00	\$ 2,587.00

RESOLUTION NO. 717

**RESOLUTION OF THE BOARD OF DIRECTORS
OF THE PLEASANT VALLEY RECREATION AND PARK DISTRICT
ADOPTING THE 2022-2023 FISCAL YEAR BUDGETS**

WHEREAS, the Board of Directors of the Pleasant Valley Recreation and Park District (“District”) has reviewed and adopted the draft budgets for Fiscal Year 2022-2023;

NOW, THEREFORE, IT IS HEREBY RESOLVED, DETERMINED, AND ORDERED by the District Board of Directors as follows:

1. That the budget document which is on file with the Secretary of the Board be adopted as the final operating and capital budget for the District for the Fiscal Year 2022-2023.
2. That the amounts designated in the final Fiscal Year 2022-2023 budgets are hereby appropriated and may be expended by the departments or funds for which they are designated, and such appropriation shall be neither increased nor decreased excepted herein.
3. That the following controls are hereby placed on the use and transfer of budgeted funds:
 - a. The General Manager is responsible for keeping expenditures within budget allocations for positions, salaries, operational expenses, and capital expenditures and may adopt budget policies as necessary to carry out that responsibility. No expenditure of funds shall be authorized unless sufficient funds have been appropriated by the Board or General Manager as described herein.
 - b. The Board must authorize any increase in the overall operating budget, capital budget, salary budget, and number of authorized regular personnel positions above the level identified in the final budget. The General Manager may authorize the hiring of temporary or part-time staff as necessary, within the limits imposed by the available funds in the budget.

PASSED AND ADOPTED by the Board of Directors of Pleasant Valley Recreation and Park District this 6th day of July 2022 by the following vote:

AYES: _____
NAYS: _____
ABSENT: _____

 Robert Kelley, Chair, Board of Directors
 PLEASANT VALLEY RECREATION
 AND PARK DISTRICT

Attested:

 Bev Dransfeldt, Secretary
 PLEASANT VALLEY RECREATION
 AND PARK DISTRICT

**PLEASANT VALLEY RECREATION AND PARK DISTRICT
STAFF REPORT / AGENDA REPORT**

TO: BOARD OF DIRECTORS

FROM: MARY OTTEN, GENERAL MANAGER
By: Bob Cerasuolo, Park Services Manager

DATE: July 6, 2022

**SUBJECT: CONSIDERATION AND APPROVAL OF THE DESIGN
PLANS FOR THE PICKLEBALL COMPLEX AT
FREEDOM PARK**

SUMMARY

The District Board has set aside Quimby funds in the amount of \$1,400,000 to design and build a Pickleball Center. The Freedom Renovation project would allow the District to utilize land that has been inactive for the past 18 years. As part of the required modifications, architects will design plans to demolish the existing buildings and pool and design the property for a Pickleball Complex. There have been three community meetings over the course of the past three (3) months to obtain feedback on recreational features of the park.

BACKGROUND

Pleasant Valley Recreation and Park District has owned the land that Freedom Park Pool occupies since November 17, 1976, however the Freedom Pool was built in 1949. The District operated the Freedom Park Pool until its' permanent closure in 2003 due to increased state and local requirements to operate the outdoor pool and based on the fact the District only operated the pool for approximately three months during the summer at a cost of \$95,000 annually.

Over the past several years the District has continued to see an increase in pickleball players within our community. Both the Board and staff have been approached on several occasions to find time and space to accommodate this growing sport. To better assess the number of pickleball players in the community and to also respond to their requests for additional courts, staff has been addressing the needs of pickleball over the past several years and has incrementally made changes.

The District Board assigned an Ad Hoc committee to continue to address the needs of pickleball while also considering the needs of tennis, surrounding park site neighbors, and the community at large. The Pickleball/Tennis Ad Hoc Committee initially met on November 2, 2020 and have continued to meet throughout this project to provide overall information and hear from the community.

At the April 7, 2021 District Board meeting, staff presented multiple short-term, mid-term, and long-term solutions to accommodate the continued growth of pickleball within the District. The Board of Directors authorized the General Manager to convert one (1) tennis court at Pitts Ranch Park and one (1) tennis court at Springville Park into dual/multi-use courts. There was further discussion related to long-term solutions which involved the conversion of the Freedom Park pool into a pickleball complex. As part of the FY 2021/2022 budgeting process, the Board approved a budget allocation of \$1.4M in Quimby fees for the Freedom Park pool pickleball conversion

project. This project will include but not be limited to the Freedom pool demolition, design and master plan for the pool and this portion of the land swap area.

On September 1, 2021, the District Board approved a Request for Proposals for Architectural Design services for Freedom Park which would develop a renovation plan for a pickleball complex.

On December 2, 2021, the District Board approved a professional service agreement with Lauterbach and Associates Inc. for the architectural design services for the Freedom Park Pickleball renovation project.

ANALYSIS

The Liaison Committee, staff, and Lauterbach held four (4) Public Workshop meetings in order to engage the community and receive input for the future pickleball complex. The first meeting was held at Freedom Park Pool which is the future site of the pickleball complex. The other three meetings were held at the Community Center. District staff varied the days and times of the meetings in order to accommodate the community and receive input.

Lauterbach and Associates received input from the community and then presented multiple design concepts gathered from the workshops. After receiving further input during the first three (3) meetings, Lauterbach and Associates presented two (2) drawings that were comprised of feedback and presented to the Ad Hoc Committee for review and further input. These two design concepts are being presented to the full board for further discussion and approval.

Recreational amenities included in design:

- 16 to 18 courts
- 1 central/center court for championship games
- Restrooms
- Multiple points of entry
- Storage
- Shading throughout
- 8-Fencing
- Parking

In one of the designs (attachment 2), there are three (3) courts less for an additional seventeen (17) parking stalls, giving the site a total of 49 stalls. Staff mentions this as parking could be a concern for the District; currently there are 32 parking stalls at the site. The Parks Department will need from 12-15 parking spaces during the week and no more than 4-5 spaces on the weekends for their staff to park. There is street parking along Eubanks and Willis Road and at the Freedom Center. If there are any baseball affiliated rentals or dog shows, this would impact parking, along with anything happening at the airport (Greek Festival, Air Show, K-Hay Fest, etc.).

Should the Board approve one of the designs and the construction cost go over the \$1.4M allocated, Lauterbach and Associates have provided a five (5) phase layout in order to move the project forward in a phased approach.

PROJECT SCOPE:

The following are key steps that may serve as a guide for next steps in the process.

- Design review and approval
- Draw up the approved designs
- County and City for permits
- RFP's for the Demolition of the current site, and the Construction Phase
- Pick a qualified bidder for the project

FISCAL IMPACT

There is no fiscal impact associated with this approval. After reviewing and evaluating the bids, staff will return to the Board and request approval. Bids will be brought back to the Board at which time there will be a fiscal impact.

STRATEGIC PLAN COMPLIANCE

Meets the 2021 Strategic Plan Goal and Strategy 1.1: Develop sustainable funding sources for Implementation of the Strategic Plan, Deferred Maintenance, Priority Projects, and On-Going Operations: Utility (L.E.D., Water, Turf Mitigation, Gas, etc.)

Meets the 2021 Strategic Plan Goal and Strategy 3.1: Renovate and Modernize Existing Parks and Recreational Facilities.

RECOMMENDATION

It is recommended the Board review and approve the design plans for the Pickleball Complex at Freedom Park.

ATTACHMENTS

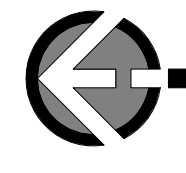
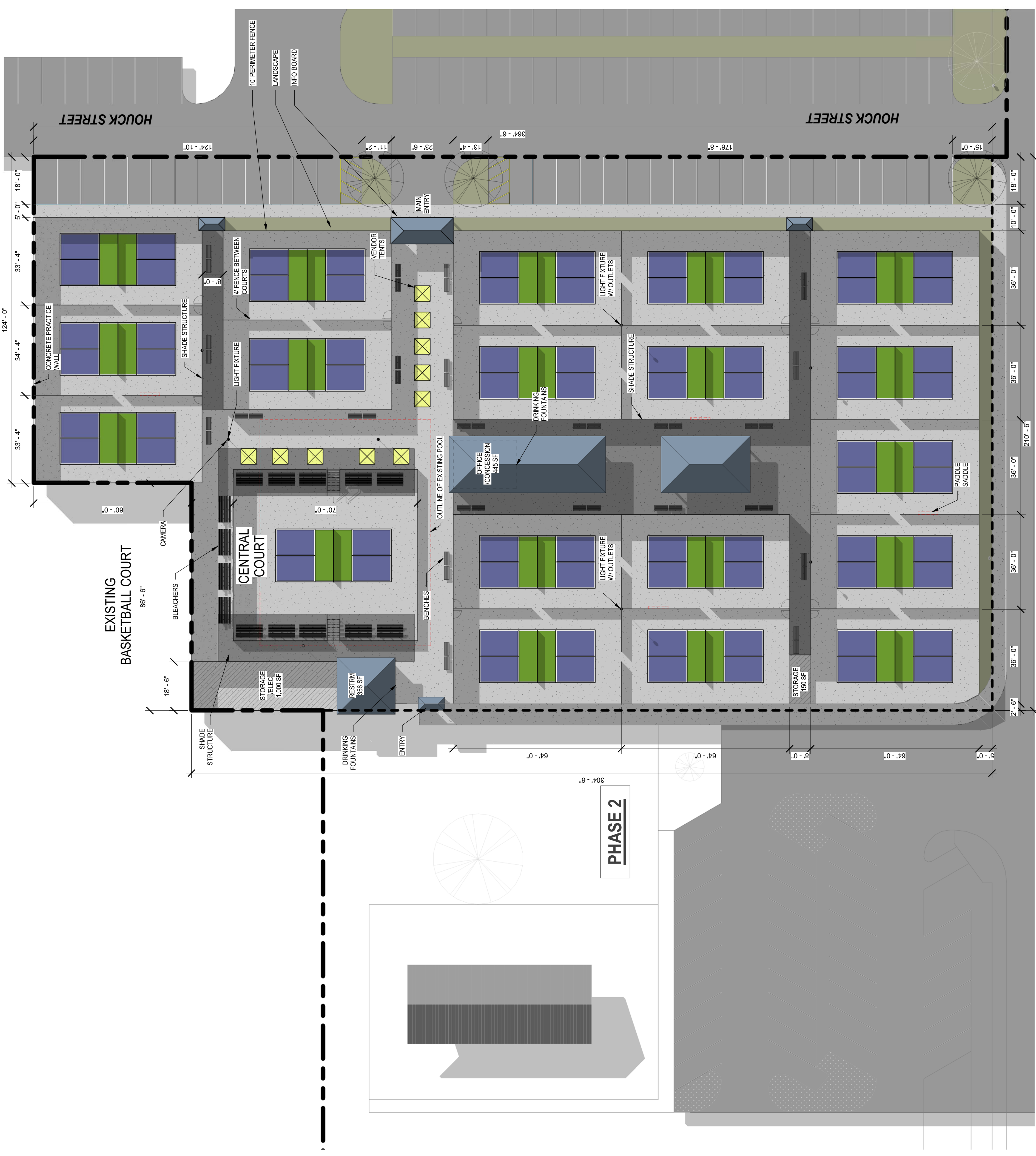
- 1) A-1.04 Site Plan (1 page)
- 2) A-1.04 Site Plan Alternate (1 page)



DESIGN FEATURES

COURTS:	18 EA
CENTRAL:	1 EA
PARKING:	32 STALLS

- EXPANDED PARKING ONLY ON HOUCK STREET. ELIMINATED ON SIDE OF PARKING LOT.
- CENTER COURT IN POOL AREA WITH SLOPED SEATING.
- AMENITIES AND RESTROOMS ARE IN THE CORNER.
- MAXIMIZE SITE FOR MAXIMUM COURTS.
- STRONG PEDESTRIAN ACCESS AND SEATING.
- LANDSCAPE AROUND PERIMETER.
- MULTIPLE POINTS OF ENTRY
- CENTRAL VENDOR LOCATION
- AREA FOR STORAGE
- CENTER AREA SHADED FOR SOCIAL GATHERINGS
- RESTROOM SET UP FOR EXPANSION FOR PHASE 2. VISIBLE FROM ENTRANCE
- SHADED WALKWAYS.
- SEATING PROVIDED FOR ADJACENT TO COURTS.
- FENCES CREATE OPPORTUNITIES FOR SPONSORSHIP



SKYWAY DRIVE

① SITE PLAN - OPTION 4
 1" = 20'-0"

**PLEASANT VALLEY RECREATION AND PARK DISTRICT
STAFF REPORT / AGENDA REPORT**

TO: BOARD OF DIRECTORS

FROM: MARY OTTEN, GENERAL MANAGER
By: Lanny Binney, Recreation Supervisor and
Dylan Gunning, Administrative Analyst

DATE: July 6, 2022

**SUBJECT: APPROVAL OF AN AGREEMENT BETWEEN THE
PLEASANT VALLEY RECREATION AND PARK
DISTRICT, CAMARILLO PONY BASEBALL AND
UNITED STATES SPECIALTY SPORTS ASSOCIATION**

SUMMARY

The Pleasant Valley Recreation and Park District (District) is entering into a new agreement with Camarillo PONY Baseball Association (CPBA) and United States Specialty Sports Association (USSSA) for the use of the baseball fields at Freedom Park and Bob Kildee Park that outlines the relationship between the District, CPBA, and USSSA.

BACKGROUND

Since the early 1970s, CPBA has been a Board-approved Community Service Organization (CSO) with the Pleasant Valley Recreation and Park District. Being a CSO provides the organization with a lower rate for rentals and priority field or facility permitting. The District currently has a CSO agreement with CPBA that the Board approved in September 2021 and will expire in 2023.

As part of the District's CSO agreement with CPBA, the baseball organization is providing field maintenance valued at approximately \$120,000 over the course of the past six years. This includes labor, supplies, and material (dirt) for the Kildee and Freedom Park ballfield infields. This maintenance agreement helps reduce District maintenance expenses.

In approximately 2009, Diamond Rock worked with Camarillo PONY Baseball by providing an Advanced Baseball League (ABL) on Sundays in the spring and fall and also tournaments throughout the year. Around 2012, Diamond Rock was dismissed by CPBA who entered into an agreement with Diamond Extreme.

USSSA replaced Diamond Extreme beginning in 2015 providing on average fourteen (14) tournaments annually along with the Sunday ABL programs. USSSA offers two (2) Advanced Baseball Leagues held in the fall for 10-week seasons and in the spring for 11-week seasons.

The initial agreement between CPBA and USSSA was that USSSA would pay CPBA a percentage of the revenue of team entries for both their tournaments and the Advanced Baseball Leagues.

CPBA then used those revenues to offset the approximate \$120,000 in maintenance cost that CPBA was performing at Kildee and Freedom Parks.

To reserve the field space for USSSA, CPBA currently submits the Field Facility Allocation and Use (FFAU) for USSSA to use Freedom and Bob Kildee for the dates of tournaments and the Advanced Baseball League. The FFAU process is the reservation process that CSO's use to request fields and facilities through the District.

USSSA provides insurance annually to District staff and pays the District the current Class 1 Community Service Group rate based on the current fee schedule of \$20 an hour for Veterans Field during the tournaments and Advanced Baseball League. All of USSSA bills for using the fields, lights, and post-event clean-up is included in the monthly CPBA bill. USSSA contributes that amount toward CPBA to cover the costs.

The District currently has a CSO agreement with CPBA and is now formalizing an agreement that outlines the full relationship between the District, CPBA, and USSSA. This agreement formalizes the relationship between the District, CPBA, and USSSA for five (5) years, starting in July 2022 and going through June 2027.

ANALYSIS

Working with CPBA and USSSA, the District has developed a new agreement with CPBA and USSSA for using and maintaining recreational facilities at Freedom Park and Bob Kildee Park. District staff has provided a high-level analysis of the agreement. To view the entire agreement, see the attached agreement.

When USSSA started its relationship with CPBA, it held about 14 tournaments yearly. Over the years, USSSA has added more tournaments to the FFAU process and currently holds approximately 18 tournaments per year. In the past, some of these tournaments have been canceled due to rain or COVID.

In the proposed new agreement, CPBA will undertake specific weekly and annual maintenance for each of the properties at Freedom and Bob Kildee Parks. CPBA has valued its field maintenance at an average of \$120,000 annually over the course of the past six years. This maintenance includes District fields at Freedom and Bob Kildee as well as the school district fields they use at Bob Kildee. CPBA will perform and maintain all baseball fields on the premises year-round, including Freedom Park infields and Bob Kildee Community Park. On a weekly basis, they will mow infields, water infield dirt, drag the infield, edge/string line infield, mound prep, home plate, and baseline prep, line outfield, line infield, bullpen prep, and clean dugouts.

Annual Maintenance Obligations that CPBA will carry out include aerification, top dressing/added materials, laser leveling and overseeding. CPBA will meet bi-annually (May and November) with the District to schedule and agree on such work.

CPBA shall maintain the Premises and areas nearby (bleachers, common areas, etc.) in a clean, sanitary, and orderly condition during scheduled activities. All paper, waste

materials, and other debris shall be picked up and properly disposed of on a daily basis by CPBA.

In return, CPBA will receive approximately 10,000 hours of use for the fields with the rental fees being waived. This time will allow CPBA to provide the community with its Spring Season (early January – May 31), the ABL Spring League from mid-March to early June, the Fall League from first week of September to the third week of November) and three PONY Tournament weeks/weekends in late June and early July.

To reserve the field space, CPBA and USSSA will submit their field usage request per the District's Field and Facility Allocation and Use process twice a year.

USSSA will meet with the District and CPBA every six months to discuss the schedule for the fourteen (14) tournaments to be held the following period. Any tournaments beyond the first fourteen tournaments of the calendar year allocated would go through the Recreation Supervisor as part of the normal rental process at the Resident Organization Fee Rate (Class II) or whichever class they would fall within.

The District shall be responsible for general maintenance of the premises at Kildee (Field 1) and Freedom Park ballfields, including mowing outfields, irrigation and rodent control. Also included are normal maintenance such as supplies, janitorial services, and repair of restrooms, including the Skyway Room, parking lot, pavilion, and barbecue areas. District staff shall be responsible for reserving and coordinating all field usage based on requests from CPBA, USSSA, and other users. The District and only the District, will rent the fields for tournaments, games, practices, and any other use of the ballfields as authorized by the District Ordinance 8 and General Use Policies.

Upon written request by CPBA, the District may agree to provide special request maintenance for CPBA and/or USSSA events, tournaments, games, and practices for the CPBA seasons. The District will proceed with such maintenance upon the condition that CPBA agrees in writing to pay the District the actual cost of any such maintenance provided by the District which is otherwise CPBA's obligation under this agreement. The District will issue a monthly invoice which must be paid within two weeks or the amount owed will accrue interest at the rate of 5% until paid.

The District shall pay the following utility costs associated with the Park Properties:

- a) Freedom Park Baseball Fields: Cost of Water, Sewer, and lights other than the sports field lighting.
- b) Bob Kildee Community Park: Cost of Water minus an annual contribution as stated in this Agreement, sewer, and lights other than the sports field lighting.

USSSA will pay District Class 1 Community Service Group Rates for the first fourteen tournaments each fiscal year located at Freedom Park and Bob Kildee Field 1. For any additional tournaments above the fourteen, USSSA will pay the District Class 2 Resident Organization Rates or whichever class they fall into for all remaining tournaments held at Freedom Park and Bob Kildee Field 1. USSSA will pay CPBA 18% from the proceeds of the tournaments held on the premises each year no later than ten days after each tournament.

The District has an agreement with the school district to use school fields at Bob Kildee for AYSO and CPBA/USSSA. As part of the agreement with the school district, the District receives and pays the water and sewage bill for the meter that covers the fields. This arrangement provides field space for AYSO, CPBA, and USSSA. The school district pays the District \$10,000 annually for its usage. AYSO uses these fields from August through November and pays the District \$10,000 in water contributions annually for this access. In the fiscal year 2020-21, the District paid \$69,068.42 for the school district's water and sewage bill.

CPBA and USSSA will pay the District a new combined \$10,000 annual water contributions as part of this new agreement: \$5,000 from CBPA and \$5,000 from USSSA for the use of the Kildee ballfields. There will be a 3% escalation fee for the water contribution in order to keep up with water costs. This, combined with the school district and AYSO contributions, leaves the District to cover the remaining \$39,068.42.

CPBA must at all times during the term of this agreement, including any extensions, be a District-approved Community Service Organization ("CSO") and operate in compliance with a CSO's obligations through this agreement's duration.

FISCAL IMPACT

This new agreement provides for better financial transparency and helps improve the cost recovery for the fields.

USSSA will pay the District Ordinance 8 Fee Schedule Community Service Organization Rate for the first 14 tournaments of the Calendar Year. This is expected to bring in approximately \$45,000 should all fourteen tournaments be played and based on the current fee schedule. The remaining tournaments will be charged at the District Ordinance 8 Fee Schedule Resident Organization Rate, resulting in revenue averaging approximately \$4,000 to \$6,000 per tournament based on the current fee schedule.

Field light fees will also be included in addition to the field rental fees based on the approved Fee Schedule at the Community Service Organization Rate for the first 14 tournaments and at the Resident Organization Rate for any tournaments after the first 14 tournaments have been held.

There will be an increase from water contributions of \$5,000 from CBPA and \$5,000 from USSSA for the use of Kildee paid to the District by January 31. Annually, there will be a 3% escalation fee for the water contribution in order to keep up with water costs.

With the current fee structure, the projected revenue from USSSA to the District will increase to approximately \$50,000 plus depending on the number of tournaments played.

STRATEGIC PLAN COMPLIANCE

Meets 2021 Strategic Plan Goal 1.1: Review costs, revenues, and subsidies for program and rentals.

Meets 2021 Strategic Plan Goal and Strategy 1.3: Identify additional sources of revenue to reduce the reliance of property tax.

RECOMMENDATION

It is recommended that the Board of Directors approve and authorize the District General Manager to enter into a new agreement with Camarillo PONY Baseball Association (CPBA) and United States Specialty Sports Association (USSSA) for the use of the baseball fields at Freedom Park and Bob Kildee Park that outlines the relationship between the District, CPBA, and USSSA.

ATTACHMENTS

- 1) Agreement (18 pages)

PLEASANT VALLEY RECREATION AND DISTRICT

AGREEMENT FOR USE AND MAINTENANCE OF RECREATIONAL FACILITIES AT FREEDOM PARK AND BOB KILDEE PARK

This Agreement is made and entered into by and between the PLEASANT VALLEY RECREATION AND DISTRICT, hereinafter referred to as "District", CAMARILLO PONY BASEBALL ASSOCIATION hereinafter referred to as "CPBA" and the United States Specialty Sports Association, hereinafter referred to as "USSSA". In consideration of their mutual covenants, conditions, agreements, obligations assumed, and other considerations contained herein, the parties hereto agree as follows:

- 1. Background.** Pursuant to authority granted by the Public Resources Code of the State of California, the District has organized, promoted, and conducted programs of community recreation since 1962. Pursuant also to the Public Resources Code, the District has established systems of recreation, recreation centers, parks, and athletic fields. It is the desire of the District to secure the fullest utilization possible of these athletic fields and related facilities.

The CPBA is an active California 501(c)3 non-profit corporation or association embracing within its purposes the provision of organized athletic programs open to the residents of the District.

The USSSA is an active California 501(c)3 non-profit corporation or association embracing within its purposes the provision of organized athletic tournaments open to the residents of the District.

It is the intent of the parties in this Agreement to establish specific understandings for the use of certain District fields and facilities by the CPBA and USSSA in the District's organized recreational and sports program in order to expand and enhance recreational opportunities for residents of the District.

- 2. Initial Term of Agreement.** This Agreement shall be for a term of five years commencing **July 6, 2022 and ending July 5, 2027**, during which time the CPBA and USSSA shall be permitted to use, on a non-exclusive basis, the Premises pursuant to the specific provisions contained herein.

- A.** While this Agreement is in effect, CPBA will undertake certain weekly and annual maintenance (as defined on Exhibits B & C) for each of the "Park Properties" (collectively also referred to as the "Premises") as defined in Section 5 and depicted on Exhibit "A". In return, CPBA will receive approximately 10,000 hours (annually) of waived field rental fees which time will include the time needed for CPBA to conduct its: Spring League (January 5th - May 31st), ABL Spring League from early to mid-March to early June, Fall League (first week of September thru third week of November), Sunday League, ABL (first week of September thru third

week of November) and three CPBA hosted Tournament weeks/weekends.

CPBA acknowledges and agrees that all landscape maintenance work undertaken on the Premises for payment will require the payment of prevailing wages and CPBA agrees to indemnify, defend, and hold harmless the District from any claims, actions, or penalties arising in connection the failure to properly pay or report prevailing wages.

- B. CPBA hours of field use will be tracked via the District’s reservation and permitting processes for Community Service Organizations.
- C. USSSA tournament hours will be tracked via the District’s reservation and permitting process.

3. **Annual Review.** An annual review shall commence by June 1, 2023, and each year thereafter at which time the District and CPBA will review the terms of this Agreement and make any necessary, mutually agreed upon minor modifications to the terms that best support the intent, goals, interests and working process of both organizations. The District’s General Manager, USSSA’s California State Director, and CPBA’s President are hereby authorized to provide written modifications on behalf of the District, USSSA, and CPBA, respectively.

- A. **Annually CPBA and USSSA must provide a written statement signed by representatives authorized to sign on behalf of each organization, under penalty of perjury, to the District they are still in good standing with the State of California.**
- B. **Should CPBA and USSSA decide not to have a working relationship, the parties agree to sign an amendment to this Agreement removing USSSA as a party, and USSSA would be required to have a separate agreement with the District and will be required to pay Class II rates or then applicable rates per the District’s fee schedule.**

4. **Extension of Term.** Provided that CPBA is not in default of any of the terms and conditions of this Agreement, the Parties may agree (but are not obligated) to extend the term of the Agreement for successive five (5) year increments, or any shorter period of time, on mutually satisfactory terms, if CPBA gives the District written notice of its request to renew at least one-hundred eighty (180) days before expiration of the then-current term. An extension will require formal approval by each parties’ Board of Directors in writing and signed by the parties.

5. **Permit to Use and Maintain:** The District owns and manages 28 public parks and recreation facilities in Camarillo. The facilities known as Freedom Park (275 E. Pleasant Valley Road) and Bob Kildee Community Park (1030 Temple Avenue) are collectively referred to herein as the “Park Properties”. None of the other District-owned parks or recreation facilities are the subject of this Agreement. The boundaries of the associated baseball fields are graphically depicted in Exhibit A, which is attached hereto and by this reference made a part hereof.

- A. The CPBA (and its officers, agents, employees, contractors, and invitees) and the USSSA (and its officers, agents, employees, contractors, and invitees) shall each

use the Park Properties in compliance with this Agreement and all District ordinances, rules, regulations, and policies. Any question whether the Premises are being used or maintained in accordance with District ordinances, rules, regulations and policies or this Agreement shall be determined exclusively by the District's General Manager.

- B.** CPBA and USSSA each shall, in connection with the conduct of their respective operations under this Agreement and at each party's sole expense, obtain and maintain in full force and effect throughout the term and any extension thereof, any and all applicable permits and business licenses which may be required by any laws including without limitations, a City business license and a County Health Department Operating and Facility Permit as well as its nonprofit status. CPBA and USSSA shall each keep itself and its employees and agents fully informed of and ensure that all work and services are provided in compliance with all applicable Federal and State laws. Failure to obtain or maintain any required license or permit may be considered a material breach of this Agreement.

C. District Responsibilities:

- a. The District shall be responsible for and provide general maintenance for the upkeep of the Premises, Freedom Park Property and Hibbits field (Bob Kildee), at issue in this Agreement, including mowing of outfields, irrigation of outfields, maintenance of the Park Property irrigation system, and rodent control as depicted in Exhibit A.
- b. The District shall provide, as part of the normal maintenance of the "Park Properties", all supplies, maintenance, janitorial services and repair of the restroom, building, Skyway room, parking lot, pavilion, and barbeque areas.
- c. The District shall be responsible for reserving and coordinating all field usage at the Park Properties based on requests from CPBA, USSSA, as well as other users. The District, and the District only, will rent out the fields at the Park Properties for tournaments, practices, games, etc. by any other organization or third party which is not part of CPBA or USSSA and will only rent the facilities to entities as authorized by the District Ordinance 8 and General Use Policies.
- d. Upon written request by CPBA, the District may agree to provide maintenance for CPBA and/or USSSA events, tournaments, and games or related activities at Park Properties for CPBA season(s). The District will proceed with such maintenance upon the condition that CPBA agrees in writing to pay the District the District's actual cost of any such maintenance provided by the District which is otherwise CPBA's obligation under this Agreement and District will issue a monthly invoice which must be paid within two weeks or the amount owed will accrue interest at the rate of 5% until paid.
- e. District shall pay the following utility costs associated with the Park Properties:
 - i. Freedom Park Baseball Fields: Cost of Water, Sewer, and lights other than the sports field lighting.
 - ii. Bob Kildee Community Park: Cost of Water minus an annual contribution as stated in this Agreement, sewer, and lights other than

the sports field lighting.

D. Camarillo Pony Baseball Association Responsibilities:

- a. CPBA shall be responsible for performing and maintaining all related work and maintenance within all baseball fields on the Premises year-round:
 - i. Freedom Park Ball Infields: the infield consisting of the dirt (brick dust) area containing home plate, the three bases (1st base, 2nd base, 3rd base), the grass or synthetic turf within this dirt area, pitcher's mound, and the dugouts as outlined in Exhibit D.
 - ii. Bob Kildee Community Park: CPBA shall perform and maintain all related work and maintenance within the entirety of all baseball fields on the Premises.
 - iii. Weekly Maintenance Obligations at all Premises: mowing infields, watering infield dirt, dragging infield, edging/string line infield, mound prep, home plate and baseline prep, lining outfield, lining infield, bullpen prep, and cleaning dugouts as outlined in Exhibit B.
 - iv. Annual Maintenance Obligations: aerification, top dressing/added materials, regarding/laser level, overseeding as further detailed in Exhibit C. CPBA will meet bi-annually (May and November) with the District to schedule all such needed work.
- b. CPBA shall maintain the Premises and areas nearby (bleachers, common areas, etc.) in a clean, sanitary, and orderly condition during scheduled activities. All paper, waste materials, and other debris shall be picked up and properly disposed of on a daily basis by the CPBA.
- c. CPBA will submit its field usage request per the District's Field and Facility Allocation and Use Process.
- d. CPBA must at all times during the term of this Agreement including an extension be a District-approved Community Service Organization ("CSO") and operate in compliance with the obligations of a CSO through the duration of this Agreement.

E. USSSA Responsibilities:

- a. USSSA shall be responsible for confirming that all Premises and adjacent areas are in an appropriate condition before and after each period of its use.
- b. USSSA shall ensure that the Premises and areas nearby (bleachers, common areas, etc.) are left in a clean, sanitary, and orderly condition after its scheduled activities. All paper, waste materials, and other debris/trash shall be picked up and properly disposed of on a daily basis per District Ordinance 8, Section 113 (Use of Lands). Should the District provide maintenance and/or debris/trash cleanup for USSSA, tournaments, and/or games at Park Properties then USSSA would be responsible to reimburse costs associated with the cleanup efforts and District will issue an invoice immediately following the event to be paid within 30 days of invoice.
- c. USSSA is required to pay for sport field lighting per the District Fee Schedule.
- d. USSSA or CPBA (on behalf of USSSA) will submit its field usage request per the District's Field and Facility Allocation and Use Process twice a year.
- e. To meet with the District and CPBA every six months to discuss the schedule

for the fourteen (14) tournaments to be held the following period. Any tournaments beyond the first fourteen tournaments of the calendar year allocated would go through the Recreation Supervisor as part of the normal rental process.

- f. To pay the District Class I Rates for the first fourteen tournaments each fiscal year located at Freedom Park and Class II Rates for all remaining tournaments held at Freedom Park and to pay CPBA 18% from the gross proceeds of the tournaments held on the Premises each year no later than 10 days after each tournament. Should USSSA desire to provide more tournaments than authorized in Section 5(E)(d) above USSSA must send a written request to the District's General Manager and CPBA proposing the dates of use and the additional compensation to be paid to the District and CBPA at least 60 days before the proposed tournament.

F. The District and CPBA agree to review any issues of field maintenance as needed. Depending on any issue(s) identified in a quarterly meeting, additional meetings may be scheduled as necessary during the term of this Agreement.

G. Neither CPBA nor USSSA shall sublease, rent, reassign or share any part of its obligations or rights under this Agreement without the written consent of the General Manager or her or his designee. No funds may be generated by CPBA or USSSA in connection with its obligations under this Agreement other than revenue from the snack bars, player membership registrations, and CPBA-sanctioned tournaments unless approved the by General Manger or designee

H. Use of the Premises.

a. CPBA will make rent payments to the District for the use of the Liberty Building during each year of the Agreement in the total amount of \$1 per year payable each year in advance of the start of their Spring season (March 1st).

a. CPBA agrees that the District is providing the Premises including the Liberty Building to CPBA in its "AS-IS" condition and agrees that it accepts the Liberty Building as such and without any representation or warranty. CPBA shall have the right to install, maintain, and operate, at its own expense: equipment, phone, fax, and wireless communication equipment in the Liberty Building. CPBA is responsible for all tenant improvements subject to compliance with Section 8 below.

b. CPBA agrees that it must maintain renter's insurance at all times it is using the Liberty Building and acknowledges and agrees that the District is not responsible for any damage, loss or theft of property at the Liberty Building.

c. Statutory Notice. The following statutory notice pursuant to California Civil Code Section 1938, District provides the following statutory notice to CPBA:

"A Certified Access Specialist (CASp) can inspect the Premises and determine whether the Premises comply with all of the applicable construction-related accessibility standards under state law. Although state law does not require a CASp inspection of the Premises, the District may not prohibit CPBA from obtaining a CASp inspection of the Premises for the occupancy or potential occupancy of CPBA and its parties, if requested by CPBA. The parties shall mutually agree on the arrangements for the time and manner of the CASp

inspection, the payment of the fee for the CASp inspection, and the cost of making any repairs necessary to correct violations of construction-related accessibility standards within the Premises.”

In accordance with the foregoing, District advises CPBA that the Liberty Building and snack bars have not gone through CASp Inspection. CPBA taking possession of the Premises on commencement of the term shall constitute CPBA’s acknowledgment that the Premises are in good condition.

6. **Use of Freedom Park Drive:** During the term of this Agreement, CPBA and its invitees and during approved tournament times USSSA and its invitees shall have ingress and egress rights over Freedom Park Drive Road which will function as the main vehicular and pedestrian connector between Willis Avenue and the Premises. CPBA and USSSA shall each be responsible for ensuring that its invitees, agents, and officers comply with all District rules and regulations relating to the use of said roadway including adherence to posted speed limits and parking on the roadway.
7. **Fee:** CPBA & USSSA shall each tender to the District an annual \$5,000 payment as a water contribution for the use of water at the Bob Kildee/Pleasant Valley School of Engineering & Arts facility in exchange for their use of the Premises, **payable to the District by January 31 of each year of the applicable agreement.** The initial payment will be required on January 31, 2023. Annually, there will be a 3% escalation fee on this water contribution in order to keep up with rising water costs.
8. **Use of Premises:** CPBA and USSSA may not use the Premises for special events (for example, fundraisers, walk-a-thons, carnivals, and rallies etc.) or any other purpose beyond the purposed defined in Section 2, “Initial Term of Agreement,” above, without written permission from the District and any required permits from other public agencies. CPBA shall submit a detailed written request to the District’s General Manager to request permission to hold a special event (a) prior to issuing any publicity regarding the event, and (b) a minimum of forty-five (45) days prior to the event. The District shall respond to CPBA’s request in writing within fourteen (14) days of receipt of the written request. Should this event be allowed CPBA is subject to all special event fees and rentals.
9. **Development of Site:** During the term of this Agreement, the Premises (including the Liberty Building and snack bars) may require modification or development to meet the needs of the CPBA and/or USSSA.
 - A. In such event, all costs incurred in such work shall be borne by the CPBA without contribution from the District, unless agreed upon in writing by both parties that the District will share in the cost of the work. If the District shares in the cost of the work CPBA understands and agrees that the work will be subject to the payment of prevailing wages and agrees to indemnify and hold the District harmless from any claims, actions, or penalties in connection the failure to properly pay or report prevailing wages.
 - B. Plans and specifications for all proposed modifications, improvements and additions shall be submitted to the District for review prior to any work being

performed. The District shall review those plans and specifications in a timely manner which shall not exceed 30 days from the date of submittal by the CPBA. If either the CPBA or the District so requests, a meeting shall be held between representatives of the CPBA and the District to resolve problems or clarify matters related to the plans and specifications. If the District finds the plans and specifications to be acceptable, it shall so advise the CPBA in writing, and the CPBA shall be authorized to perform the modifications, improvements, and additions in accordance with those plans and specifications. If the plans and specifications are not acceptable to the District the CPBA shall be so advised and given the opportunity to modify the plans and specifications or provide new plans and specifications for consideration by the District. Any construction by CPBA shall be in strict accordance with all local building codes and requirements. Any project having an estimated value greater than \$25,000 will be required to follow the Districts formal bidding procedures.

- C. All modifications, improvements, and additions performed by the CPBA shall be completed in strict accordance with the plans and specifications which have been approved by the District, using materials and construction techniques which are consistent with District standards. Construction by the CPBA shall be in strict accordance with all local building codes and requirements.
- D. In the event that a temporary or permanent alteration is made by CPBA to the Premises, CPBA shall provide such faithful performance bonds and labor and material bonds as District may reasonably demand. The terms and provisions of the construction contract to accomplish any such alterations shall be subject to the prior written approval of the General Manager and/or his or her designee and shall be in strict accordance with all local and state building codes and requirements including prevailing wage and bidding requirements when applicable.
- E. The District reserves for itself the right to inspect all such work. Accordingly, the CPBA shall plan and coordinate such work with the District to provide for such inspection. In the event District inspectors determine that work is not being performed in accordance with the plans and specifications, the CPBA shall immediately correct such deficiencies in the work and take corrective action to ensure compliance with the plans and specifications. In the event of failure to comply with the plans and the specifications, the District may, at its option, require termination of work on such modification or development, or District may correct such deficiencies and all costs so incurred shall be paid by the CPBA within ten (10) days after submission of an itemized statement.
- F. During any modification, improvements or new additions, the CPBA shall assign a person to coordinate work being performed with District personnel. Said person shall be knowledgeable in the building trades and in local building codes and requirements. Said person shall be available during the construction period for job site consultation with District staff on a regular, weekly basis, and on an emergency basis to handle any construction problems which may develop.

10. **Damage and Repairs:** The CPBA and/or USSSA shall not commit or allow to occur by any of its officers, agents, or invitees any waste upon the Premises of the District, or any nuisance or other act or thing which may disturb use of nearby District property or facilities or disturb nearby privately owned or publicly owned property. Further, during such times as the Premises are used by CPBA and/or USSSA under this Agreement the CPBA and its officers, representatives, and members and USSSA and its officers, representatives, and members shall endeavor to restrain persons not affiliated with their organizations from committing any waste or damage upon the Premises or on property which is adjacent to same. In the event District property or properties owned by others are damaged or destroyed as a result of use under this Agreement, the CPBA and/or USSSA, as applicable, shall immediately reimburse the District or such third party for such costs as shall be incurred in repairing said damage and restoring the property to its condition prior to said use and damage.

11. **Supervision of Use:** Whenever the CPBA and/or USSSA is using the Premises, the CPBA and/or USSSA, as applicable, shall supervise such use through the services of responsible adults who shall be familiar with the program of the CPBA and/or USSSA, as applicable, and the arrangements which have been made by the CPBA, USSSA, and the District for use of said Premises. It is specifically understood by CPBA and USSSA that the District does not provide personnel to supervise or assist in the operation of the CPBA's or USSSA's activities. The District may, however, monitor the use of the Premises under this Agreement to ensure that such use shall be consistent with this Agreement and the public interest. During all use under this Agreement, the CPBA, USSSA and all individuals engaged in their programs and their invitees shall respect and comply with the reasonable directions and requests of District representatives relative to such use.

12. **Use of Portable Equipment:** Portable equipment, such as storage bins, backstops, bleachers, outfield barricades and batting cages shall be permitted on the Premises under this Agreement at CPBA's and USSSA's risk. Prior to placing portable equipment on the Premises, in addition to the portable equipment owned by CPBA and/or USSSA which is located at Freedom Park (3 sheds) and Bob Kildee Park (6 storage containers) in place at the time of execution of this Agreement, the CPBA shall submit to the District plans and specifications describing in detail the specific equipment to be used and the planned locations for said equipment. If the use of said equipment is approved by the District, with such permission being processed through the District, the CPBA may use such portable equipment on the District property designated. All such portable equipment shall meet the specifications of the District and shall be located and stored in accordance with directions by the District. The CPBA and USSSA shall maintain all such portable equipment (i.e. fencing, pitching mounds) in a state of good condition and repair at all times.

13. **Snack Bar:** During such times as the CPBA is actually using the Premises, the CPBA is permitted to maintain and operate a snack bar consistent with the terms set forth in Exhibit D to serve food and beverages which are customarily sold at such activities, provided that no alcoholic beverages may be sold, as long as CPBA obtains and maintains all required permits to operate the snack bar. CPBA shall, at its sole expense, obtain and maintain all applicable licenses and County health permits associated with operation of the snack bar and comply with all applicable wage, hour, and insurance laws with respect to any people hired to work at the snack bar and all applicable tax regulations. Additionally, CPBA shall

at all times only assign qualified and trained staff for the operations of the snack bar and shall ensure that the snack bar is properly cleaned after each day's use.

14. Insurance & Indemnification: The District is a member of the California Association for Park and Recreation Indemnity ("CAPRI"). CPBA (and its officers, representatives, members, employees, contractors and invitees) and USSSA (and its officers, representatives, members, employees, contractors and invitees) shall at all times conform its activities at the Park Properties with all written guidelines provided by CAPRI, which CPBA and USSSA shall review prior to the execution of this Agreement and shall refrain from any activity which may limit or jeopardize the District's liability insurance coverage through CAPRI. Additionally, USSSA and CPBA (on its behalf and on behalf of any contractors hired by CPBA to perform any services on the Premises) shall procure and maintain, at its sole cost and expense, in a form and content satisfactory to the District, during the entire term of this Agreement including any extension thereof, the following policies of insurance:

- A. **Commercial General Liability Insurance.** A policy of commercial general liability insurance using Insurance Services Office "Commercial General Liability" policy form CG 00 01, with an edition date prior to 2004, or the exact equivalent. Coverage for an additional insured shall not be limited to its vicarious liability. Defense costs must be paid in addition to limits. Limits shall be no less than \$2,000,00.00 per occurrence for all covered losses and no less than \$5,000,000.00 general aggregate.
- B. **Workers' Compensation Insurance.** A policy of workers' compensation insurance on a state-approved policy form providing statutory benefits as required by law with employer's liability limits no less than \$1,000,000.00 per accident for all covered losses. Notwithstanding the foregoing, CPBA shall not be required to maintain workers' compensation insurance if CPBA has no employees and if CPBA submits a statement signed under penalty of perjury to the District's Manager that CPBA has no employees. For purposes of this paragraph, independent contractors are not employees.
- C. **Sexual Abuse or Molestation (SAM) Liability:** A policy covering Sexual Abuse and Molestation with a limit no less than \$1,000,000 per occurrence or claim.

All of the above policies of insurance shall be primary insurance. Copies of the required certificates of insurance must be provided to the District prior to the effective date of this Agreement. The general liability policy shall name the District's officers, employees and agents ("District Parties") as additional insureds and shall waive all rights of subrogation and contribution it may have against the District and the District's Parties and their respective insurers. Moreover, the insurance policy must specify that where the primary insured does not satisfy the self-insured retention, any additional insured may satisfy the self-insured retention. All of said policies of insurance shall provide that said insurance may be not cancelled without providing ten (10) days prior written notice by registered mail to the District. In the event any of said policies of insurance are cancelled or amended, CPBA or USSSA, as applicable, shall, prior to the cancellation or amendment date, submit new evidence of insurance in conformance with this Section to the District's Manager.

CPBA and USSSA each agrees that the provisions of this Section shall not be construed as limiting in any way the extent to which it may be held responsible for the payment of damages to any persons

or property resulting from its activities or the activities of any person or persons for which it is responsible.

The insurance required by this Agreement shall be satisfactory only if issued by companies qualified to do business in California, rated "A" or better in the most recent edition of Best Rating Guide or The Key Rating Guide, and only if they are of a financial category Class VII or better, unless such requirements are waived by the Risk Manager of the District due to unique circumstances.

D. **Indemnity by CPBA.** CPBA agrees to defend, indemnify, and hold harmless the District and the District's Parties from any and all actual or alleged claims, causes of action, liability, damages, or injury to property or persons, including wrongful death, occurring in connection with the use, operation and maintenance of the Premises including the Liberty Building and/or the snack bar(s) and/or the failure to comply with prevailing wage laws or the failure to comply with wage and hour, tax or other applicable laws, whether imposed by a court of law or by administrative action of any federal, state, or local governmental agency, arising out of the CPBA or its officers, representatives, members, employees contractors or invitees ("CPBA Parties") entry onto, use and/or maintenance of the Premises pursuant to this Agreement, except to the extent such injury arises out of the gross or willful negligence of the District or District's Parties. This indemnification includes, without limitation, the payment of all penalties, fines, judgments, awards, decrees, attorneys' fees, and related costs or expenses, and the reimbursement of the District and the District's Parties for all legal expenses and costs incurred by each of them. CPBA's obligation shall not be restricted to insurance or self-insurance proceeds, if any, received by the District or the District's Parties.

E. **Indemnity by USSSA.** USSSA agrees to defend, indemnify, and hold harmless the District and the District's Parties from any and all actual or alleged claims, causes of action, liability, damages, or injury to property or persons, including wrongful death, occurring in connection with the use, operation and maintenance of the Premises including the Liberty Building and/or the snack bar(s) and/or the failure to comply with prevailing wage laws or the failure to comply with wage and hour, tax or other applicable laws, whether imposed by a court of law or by administrative action of any federal, state, or local governmental agency, arising out of the USSSA or its officers, representatives, members, employees contractors or invitees ("USSSA Parties") entry onto, use and/or maintenance of the Premises pursuant to this Agreement, except to the extent such injury arises out of the gross or willful negligence of the District or District's Parties. This indemnification includes, without limitation, the payment of all penalties, fines, judgments, awards, decrees, attorneys' fees, and related costs or expenses, and the reimbursement of the District and the District's Parties for all legal expenses and costs incurred by each of them. USSSA's obligation shall not be restricted to insurance or self-insurance proceeds, if any, received by the District or the District's Parties

15. **Non-Discrimination:** Neither CPBA nor USSSA shall exclude from its employment in the performance of this Agreement any persons discriminate against any employee or customer for employment or access to the Premises because of race, creed, religion, color, handicap, sex, age, marital status, sexual orientation, or place of national origin.

16. **Independent Contractor:** It is expressly understood between the parties that no

employee/employer relationship is intended, the relationship of CPBA to District and USSSA to the District being that of independent contractors. District shall not be required to make any payroll deductions or provide Workers' Compensation Insurance coverage or health benefits to CPBA or USSSA employees or contractors. CPBA and USSSA are each solely responsible for selecting the means, methods, and procedures for performing its services hereunder as assigned by District and for coordinating all portions of the work so the results will be satisfactory to District. CPBA and USSSA will each supply all tools and instruments required to perform its services under this Agreement.

17. **Control:** Neither District nor its officers, agents, or employees and/or volunteers shall have sufficient control over the conduct of CPBA, any CPBA Parties, USSSA, or any USSSA Parties except as herein set forth; and CPBA and USSSA each expressly agrees not to represent that it or any of its agents, servants, or employees are the gents, servants, or employees of District.
18. **Assignment:** The permission to use the fields and facilities contained in this Agreement has been granted by the District only after careful consideration of the reputation and responsibility of the CPBA and USSSA and the nature of the uses to be made of same. Accordingly, this Agreement may not be transferred, assigned or sub-leased to any other individual or entity. Further, the CPBA and USSSA shall not authorize or permit use of said Premises by other entities or individuals without the prior written approval of the District.
19. **Applicable Law:** This Agreement shall be interpreted under and be governed by the laws of the State of California.
20. **Intoxicating Beverages and Drugs:** The CPBA and USSSA shall not use, or permit to be used, in connection with its use of the Premises, any intoxicating beverages or drugs without the specific written approval of the District and all required permits. District approval for the use of same shall be given only after a formal application has been made to the District, and that application has been thoroughly reviewed and evaluated. In the event District approval is given for the use of intoxicating beverages in connection with the use of the Premises, the CPBA and/or USSSA, as applicable, shall pay such additional charges and costs as shall be associated with such use, and the CPBA and/or USSSA shall comply with all additional rules and regulations of the District applicable to such use.
21. **Notices:** All notices to be given under this Agreement shall be in writing and shall be effective either upon personal delivery, or upon being sent by registered mail or certified mail, return receipt requested, addressed to the party to whom such notice is given. Notice sent as above shall be deemed served 48 hours after deposit in the United States mail and issuance of a registered or certified mail receipt. Notice shall be given to the District as the following address:

If to District:

Pleasant Valley Recreation and Park District
1605 Burnley Street
Camarillo, CA 93010
Attention: General Manager

If to CPBA:

Camarillo Pony Baseball Association, Inc.
PO Box 2814
Camarillo, CA 93010
Attention : CPBA President

If to USSSA :

United States Specialty Sports Association
912 Pancho Road
Camarillo, CA 93012
Attention : USSSA California Representative

- 22. Failure of Performance:** If the CPBA and/or USSSA fails to comply with any of the terms, conditions, provisions, or requirements of this Agreement, the District shall give written notice to such party of the violation of the terms and conditions of this Agreement and the District shall give that party the opportunity to cure said defects. If the defaulting party fails to cure such defects or fails to have in place a plan to cure such defects which is acceptable to the District within thirty (30) days following the giving of said notice by the District, the District may in its sole discretion temporarily terminate said use or permanently terminate this Agreement with respect to the defaulting party, including the termination of all use of the Premises. If the District terminates this Agreement, pursuant to this paragraph, the defaulting party and its invitees shall immediately cease use of the facility and they shall, within thirty (30) days following such termination, remove from the facility all equipment and other personal property belonging to the it and its parties. In the event the such defaulting party does not remove said property within thirty (30) days following termination, said property shall be deemed abandoned and shall become the property of the District. In such event, the District may either use, sell or otherwise dispose of same at its sole discretion.
- 23. Termination:** Notwithstanding the term of this Agreement and extension option above, this Agreement may be terminated without cause in the sole discretion of either party by giving at least six (6) months prior written notice to the other of election to terminate this Agreement. The District's General Manager, CPBA's President, and USSSA's California Representative are hereby authorized to give written termination notice on behalf of the District, CPBA, and USSSA, respectively.
- 24. Possessory Interest:** CPBA shall be solely responsible for all possessory interest, sales or property taxes that may be assessed in connection with CPBA's and USSSA's use or possession of the Premises.
- 25. Background Checks:** As some maintenance activities occur while children are present CPBA and USSSA each hereby warrants that any employee, agent, volunteer and contractor of CPBA and USSSA who enters the Park Properties pursuant to this Agreement who may have contact with children has never been convicted of any offense specified in Public Resources Code Section 5164 or Penal Code Section 11105.3 which would preclude any such person from working near children.
- 26. Authority to Enter Agreement:** Each party warrants that the individuals who have signed this Agreement have the legal power, right and authority to enter into this Agreement and bind each

respective Party.

27. **Waiver:** The waiver by either party of any breach of any term, covenant, condition, provision, or requirement herein contained shall not be deemed to be a waiver of said term, covenant, condition, provision, or requirement or any subsequent breach of same or any other term, covenant, condition, provision, or requirement herein contained.

DISTRICT:
PLEASANT VALLEY RECREATION AND PARK
DISTRICT

CPBA:
CAMARILLO PONY BASEBALL
ASSOCIATION

By _____
Robert Kelley, Board Chair

By _____
Alex Mathis, CPBA, President

ATTEST:

Dylan Gunning, Clerk of the Board

By _____
Robert Drescher, Vice President

USSSA:
UNITED STATES SPECIALTY
SPORTS ASSOCIATION

APPROVED AS TO FORM

Tiffany J Israel, District Counsel

By: _____
Jeremy Huffman, USSSA Representative

By: _____

EXHIBIT A
PARK PROPERTIES

Bob Kildee Community Park
1030 Temple Avenue, Camarillo, CA 93010

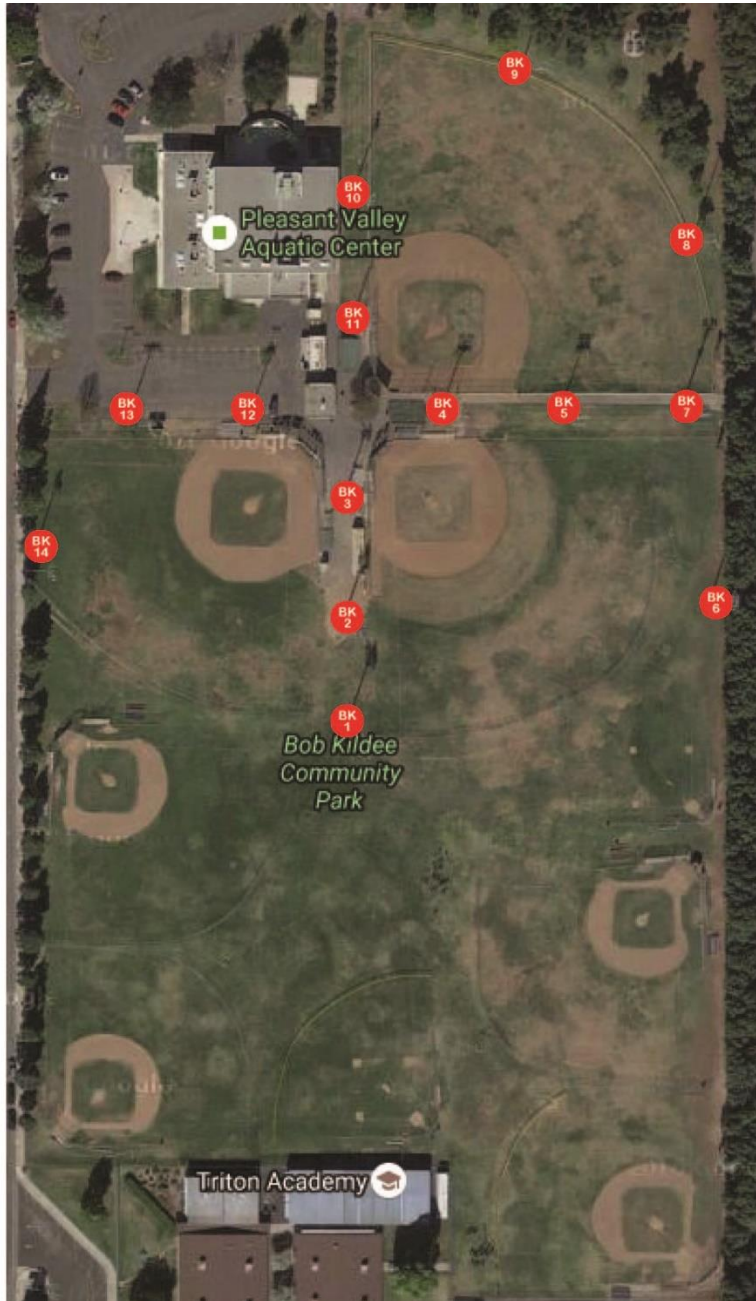


EXHIBIT A
PARK PROPERTIES

Freedom Baseball Fields
275 E Pleasant Valley Road, Camarillo CA 93010



EXHIBIT B
WEEKLY MAINTENANCE

**CPBA's WEEKLY MAINTENANCE
OBLIGATIONS**

Maintenance Task	Weekly Frequency
Mowing Infield	2
Watering Infield Dirt	6
Dragging Infield	6
Edging Infield	1
Mound Prep	6
Home plate & Baseline prep	6
Lining outfield	1
Lining infield	6
String trim fence lines	1
Bullpen prep	6
Warning track prep	3
Clean dug-outs	6

ATTACHMENT C
ANNUAL MAINTENANCE

ANNUAL MAINTENANCE				
Tasks		Frequency	Time of Year	Organization Responsible
Fertilizing				
Infield & Wings		6		PVRPD
Aerification				
Infield & Outfield		4		CPBA
Verticut / Dethatching				
Infield & Outfield		1 - 2	Summer Closure	PVRPD
Infield Renovation (skinned area)				
Top dressing / Add Material		2	March & Summer Closure	CPBA
Re-Grading/Laser Level		1	Summer Closure	CPBA
Overseed		1		
Infield		1	April (GN-1 Sod)	CPBA
Wings		1	April (GN-1 Sod)	
Herbicide Treatment				
Broadleaf		2		PVRPD
Selective		4		PVRPD
Non-Selective		4		PVRPD
Top dress				
Infield		2	Feb/March & Summer Closure	CPBA
Rodent Control				
Freedom Fields		1	February and as needed	PVRPD

ATTACHMENT D
SNACK BAR AGREEMENT

Per Camarillo Pony Baseball Association Community Service Agreement

**PLEASANT VALLEY RECREATION AND PARK DISTRICT
STAFF REPORT / AGENDA REPORT**

TO: BOARD OF DIRECTORS

FROM: MARY OTTEN, GENERAL MANAGER
By: Dylan Gunning, Administrative Analyst

DATE: July 6, 2022

**SUBJECT: CONSIDERATION AND APPROVAL OF AN
AGREEMENT BETWEEN THE PLEASANT VALLEY
RECREATION AND PARK DISTRICT AND FM3
RESEARCH TO PERFORM A VOTER OPINION
SURVEY**

SUMMARY

The Pleasant Valley Recreation & Park District (“District”) and City of Camarillo (“City”) jointly approved “Plan D” (Stand-Alone); a 30,730 square foot Multi-Generational Community Recreation Facility addition which includes a 2-court gymnasium, two large activity rooms, medium activity room, lobby and office space, lockers, restrooms, and storage. Costs for the construction of this option are estimated at \$39.5 million. Neither organization can afford the project in its entirety so both organizations have been tasked with exploring financing options for the project.

BACKGROUND

The District and City partnered to request assistance in the visioning and preparation of design concepts and cost estimations for a Multi-Generational Community Recreation Facility. The District approved the architectural firm of LPA, Inc. to conduct further cost and design refinement studies for the Multi-Generational Community Recreation Facility Design Project. LPA worked collaboratively with the District, the City Liaison Committee, and the community to draft four concept designs. As part of the design process, they attempted to integrate the new facilities with the current facilities, performed a site analysis, cost estimations and structural assessments, as well as reviewed operations and maintenance costs.

As part of the scope of work, each of the four concepts included a preliminary site plan, rendering, cost estimation, as well as operational and maintenance cost. The Liaison Committee requested the District Board narrow the selection from four preliminary designs to two designs; one design considered to be a stand-alone facility, while the other integrated into the existing structure.

At the September 16, 2019 joint special meeting, the District Board and City Council agreed to Option D (Stand Alone). This 30,730 square foot addition includes a 2-court gymnasium, a large activity room, a large multi-purpose/fitness room, a medium activity room, lobby and office space, lockers, restrooms, and storage. Costs for the construction of this option at the time were estimated at \$34.5 million and would not require seismic retrofitting.

On October 24, 2019, the Board of Directors held a special session regarding possible financing options available to both the District and the City of Camarillo. A community conversation regarding a possible revenue measure is ripe for discussion as the District and City are unable to finance the entire \$34.5 million dollar cost.

Both the District and City entered into a Cooperative Agreement in February of 2020 to continue moving the Multi-Generational Community Recreation Facility project forward. On March 4, 2020, the Governor declared a State of Emergency due to COVID-19. Due to the uncertainties of COVID-19, the District and City Liaison Committee met on April 2, 2020 to discuss next steps for this project and determined it was best to place this project on hold due to the pandemic and not knowing what economic and staffing pressures would be placed on each agency.

On October 6, 2021, the Board approved and authorized the General Manager to enter into a First Amendment to contract services agreement for the 2020 Architectural & Design Services with LPA to further refine the architectural design.

The District and City Liaison Committee held a meeting on December 6, 2021 where it was decided to get an updated cost estimate of the project. At the February 10, 2022 District and City Liaison Committee meeting, LPA presented the updated cost estimate showing an increase of \$5.5 million for a total of \$39.5 million.

With the increase in costs, LPA presented options to either build it in its entirety or to do a phased building approach. The phased building approach would split the building between the Activity/Fitness section and the Gymnasium section. In either of the phased approaches, a lobby would be built, and the location of the lobby would change based on which section was built.

This method would allow for the cost to be spread out in phases, however, the total cost would increase to between \$41 million and \$42 million, depending on the order of sections being built.

Phase 1	Phase 2	Total Cost
Activity & Fitness w/ Lobby \$22,329,055	Gymnasium \$19,882,672	\$42,211,727
Gymnasium w/ Lobby \$26,016,705	Activity & Fitness \$15,152,213	\$41,168,918

At the February 10, 2022, District and City Liaison Committee meeting, it was decided the next steps would be to conduct a voter survey and to work with a financial planner to evaluate funding options.

ANALYSIS

Neither organization can afford the project in its entirety so both organizations have been tasked with exploring financing options for the project. On August 28, 2019, the Camarillo City Council conducted a study session with Curt de Crinis who gave a presentation to the Council on funding options for the facility. Staff asked Curt de Crinis to present the same and/or a similar funding option presentation to the District Board on October 24, 2019 to assist the Board in the decision-making process of funding for the new facility.

The presentation provided financing options, such as:

- Park District General Fund Reserves
- Park District Special Capital Funds and Development Fees
- Park District Existing Assessments and Grants
- City General Fund Reserves
- New Voter Approved Special Parcel or Sales Tax
- Proceeds of Bonds

At the conclusion of the special session, the Board authorized staff to take the next step to retain a consulting firm that has assisted other public agencies along the path toward the decision on whether or not to place an item on the ballot. A team with expertise with special taxes, polling, elections as well as public information and outreach is desirable.

In order to consider, evaluate and select a consultant, in March 2022 staff and the Liaison Committee issued a Request for Proposals seeking a consulting firm to assist the District with the evaluation of, and if feasible, creation of, a revenue measure to be considered by the voters at some point in the future.

The District received four Request for Proposal responses from the following companies to provide Voter Opinion Surveys:

- 1) FM3 Research
- 2) EMC Research
- 3) SCI Consulting
- 4) True North Research

Staff and the committee performed a thorough review and discussed the four proposals at the May 26, 2022 Liaison Committee Meeting. The committee carefully considered the following considerations: qualification and expertise of the key staff; past performance record; firm's qualification and technical experience particularly within municipal government environment; understanding of the project, approach, and methodology; proposed costs of service; and readability.

Following a detailed review, it was unanimously decided by the committee to bring the proposal provided by FM3 Research to the District's Board of Directors to enter an agreement for a Voter Opinion Survey.

FM3 has performed over 200 surveys on average each year with voter approval of over 600 finance measures for California agencies (including 66 on the November 2020 ballot alone), with a success rate greater than 95 percent. FM3 has local experience performing voter opinion surveys including with the City of Camarillo in 2021, Conejo Recreation & Park District in 2021, County of Ventura in 2020, and the City of Agoura Hills in 2020.

FM3 offers survey length options of either 15 or 20 minutes. However, FM3 recommends the 20-minute questionnaire for this survey, as this length will provide the opportunity to evaluate support for various potential funding mechanisms, as well as the importance of a broader range of potential uses of measure funds, tax rates, ballot label language, and informational statements – increasing the level of information the District will have about the priorities and tax tolerances of our voters and thereby helping to position the District for success.

With approximately 47,000 registered voters who are likely to participate in the November 2024 General Election, the District has a moderately-sized electorate. For an electorate our size, FM3 recommends using a sample size of 400 interviews for this project. FM3 believes that a sample of this size will provide a balance between precision and cost-effectiveness. The margin of error for a sample of 400 is +/- 4.9 percentage points.

Surveying the population of likely November 2024 Presidential Election voters will also provide data on the perceptions of the smaller group of likely 2024 primary and 2023 special election voters, as these groups are a subset of those who are likely to vote in the Presidential Election. This will enable FM3 to compare support for and viability of a potential finance measure in both the June and November 2024 elections and a 2023 special election, providing the agencies with multiple options for when to place a measure before voters in order to maximize the opportunity for success.

Should the District wish to test multiple measures in the survey and to assess them in the June and November 2024 elections and a 2023 special election, FM3 suggests the option of conducting an additional oversample of approximately 100 2023 special election voters (the exact recommendation for the oversample will ultimately be based on the definition of 2023 likely special election voters which will be determined after factoring in turnout in the 2022 elections). This would produce a total sample size of 500 and would provide greater opportunity for meaningful analysis among our electorate. In this sampling scenario, when looking at the November 2024 electorate, the oversample of 2023 special election voters would be weighted down to its true proportion of that electorate.

Should the District and City choose to test a sales tax funding mechanism, only voters registered in the City of Camarillo would be asked questions about the sales tax.

In order to write a customized survey, FM3 will inquire about information including facts and figures about the condition of current facilities, the degree of use or overuse experienced by facilities, growth rates in the City/District, unmet funding needs, funding consequences should the ballot measure not pass, and so on.

FM3 will use a dual mode - online, and telephone (landline and wireless) interviewing methodology for this survey. The contemporary approach for gathering statistically reliable data is to employ the traditional telephone survey methodology alongside the latest online survey applications, with invitations to take the survey online distributed to potential respondents via email and by text message. In instances where a potential respondent is randomly selected to take the survey online but does not promptly respond to the email invitation to do so, FM3 will follow up with a text message invitation, and an additional reminder, as necessary.

Combining the data from the telephone and online surveys produces an all-inclusive, representative sample of the population of interest.

Using this modern dual-mode survey methodology, FM3 collects survey data in two stages: **Stage one** of the polling process will include online interviews. During this stage, FM3 will pull a randomized sample of the District's likely voters. Once FM3 has identified email addresses for the desired number of respondents, an invitation will be sent to the individuals for whom an email

address is available. The email invitation will provide a link for the voter to take the survey online. Three to four days after this initial email invitation is sent, a second reminder email will be directed to recipients who have not yet taken the survey, requesting that they do so.

In addition to sending out email invitations, FM3 will also distribute text message invitations to voters who have cellular telephone numbers, inviting them to take the survey online. This approach is particularly effective at increasing survey response rates in smaller communities, helping provide a larger overall sample size and more precise survey results.

Stage two of the polling process will include telephone interviews. Within a week of the initial email's distribution, FM3 will conduct a thorough examination of the demographic characteristics of those who have taken the survey online. By comparing the demographic characteristics of those who have completed the survey online with the attributes of the District's likely voter population as a whole, FM3 will note specific subsets that are either overrepresented or underrepresented in the online sample. In many communities, those who opt to take a survey online tend to be younger, more recent voter registrants, and have higher incomes than the broader electorate. To control for attitudinal differences between voters who are more likely to respond to a survey online and those who prefer to participate via telephone, FM3 will take care to ensure a 50%-50% balance between the total number of online and telephone respondents to the survey.

FM3 will then conduct further interviews with additional respondents by telephone. The telephone interviews will be conducted primarily among respondents who were underrepresented in the online sample, thereby producing an overall survey sample using both methodologies (online and telephone) that mirrors the District's likely voter population.

Given the composition of those who generally opt to take surveys online, it is likely that telephone interviews will be heavily concentrated among respondents ages 50 and over, and other groups that are less likely to have an email address on public record. FM3 will conduct a smaller number of telephone interviews among individuals whose demographic profile matches that of the online survey participants (but for whom no email address is available) to ensure the accuracy of the data produced by the initial, online portion of the survey.

Sample Size: FM3 recommends a 20-minute survey to allow adequate opportunity to test a broader range of potential ballot language, funding mechanisms, and tax rate combinations—thereby increasing the likelihood of identifying a combination that aligns with voters' priorities sufficiently to earn their support. A survey of 20 minutes in length typically allows for 55-70 unique questions while a 15-minute survey would allow approximately 40 to 55 unique questions.

A sample of 400 interviews will allow the research team to not only analyze different funding mechanisms and electorates, but also key demographic groups such as gender, age, education, party registration, race/ethnicity, geography, and other variables of interest, and cross-tabulate these variables against the responses to each survey question.

The November 2024 sample size of 400 interviews would yield a margin of sampling error of ± 4.9 percentage points for the November 2024 electorate. After the June 2022 and November 2022 elections, FM3 will have a better sense of the proportion of likely 2023 special election voters based on turnout scenarios that include the 2022 elections. However, if we assume that among this sample of 400, approximately 200 will also be likely 2023 special election voters, this sample of 200 would have a margin of error of approximately ± 7.1 percentage points.

If conducting an oversample of 100 2023 special election voters is preferred, this will produce a margin of error of ± 5.8 percentage points for the total sample of 300 2023 special election voters. Again, we will be able to provide the agencies with the definition of likely special election voters in 2023 after we factor in turnout from the 2022 elections.

Results of the survey can be presented both in-person and in writing, depending on the District/City of Camarillo team's scheduling needs and preferences. This report will, at a minimum, take the form of a detailed PowerPoint presentation, but can take additional forms depending upon the District and City's needs. The report will explain the research design and methodology used and provide key detailed findings. It will also provide clear recommendations regarding how to use survey results to achieve objectives, including which funding mechanism and electorate presents the greatest viability and how to communicate most effectively with the public about the measure. FM3 will present a draft report for consideration by the City/District and revise it based on their review.

After FM3's report and presentation have been completed, FM3 will remain available to answer follow-up questions from the District and City of Camarillo and present results to key stakeholders. FM3 views all survey responses as an ongoing data resource; should the need arise, FM3 can undertake further analysis to provide answers to follow-up questions that may be posed by the District, the City of Camarillo, or other interested parties.

If it is determined to proceed with the ballot measure, FM3 has a vendor, TBWBH Strategies, whom the District can contract with to provide public outreach, communication, and awareness-building to position the measure for success.

FISCAL IMPACT

The fiscal impact of this project is not to exceed \$35,000. The 15-minute survey is \$29,000 for 400 results. The 20-minute survey is \$32,000 for 400 results. An option to "oversample" an additional 100 results adds an additional \$2,500.

STRATEGIC PLAN COMPLIANCE

Meets 2021 Strategic Plan Goal 2.1.C: Retain a consulting firm to further explore a voter survey regarding a tax measure. Based on the results of the voter survey, present potential funding options for a new facility.

RECOMMENDATION

It is recommended that the Board of Directors approve and authorize the General Manager to enter into an agreement with FM3 Research to perform a Voter Opinion Survey not to exceed \$35,000.

ATTACHMENTS

- 1) FM3 Research Proposal (116 pages)
- 2) Draft Professional Service Agreement (13 pages)
- 3) FM3 Scope of Work (2 pages)

Proposal to Provide Voter Opinion Surveys and Polling Services for the Pleasant Valley Recreation and Park District & the City of Camarillo

Submitted by FM3 Research & TBWBH Strategies



Contact:

Richard Bernard, Ph.D.
FM3 Partner



OPINION
RESEARCH
& STRATEGY

Jared Boigon
TBWBH Partner



March 29, 2022

Mary Otten, General Manager
Pleasant Valley Recreation & Park District
1605 E. Burnley Street
Camarillo, CA 93010

Dear Ms. Otten,

Fairbank, Maslin, Maullin, Metz & Associates, Inc. (FM3 Research) is pleased to present this proposal to provide public opinion research on behalf of the Pleasant Valley Recreation and Park District (“the District”) and the City of Camarillo (“the City”). As you may know, FM3 is a recognized industry leader in providing public opinion research that helps local government agencies throughout California secure voter approval for tax and bond ballot measures. Moreover, we have broad experience in your area, including conducting research on behalf of the City of Camarillo in fall 2021.

We understand that the District and the City (“the agencies”), working in partnership, are seeking to conduct voter opinion survey research to determine the viability of a revenue measure to fund the new Senior and Community Recreation Facility, assist in crafting the most effective ballot label language possible (should the agencies move forward with a ballot measure), and provide strategic recommendations for a legally permissible public engagement and education effort related to the measure. We are also aware that the agencies intend to utilize the results of this survey research to inform your decision-making regarding several critical factors related to a potential ballot measure, including selecting the combination of funding mechanism, sponsoring jurisdiction, and timing that achieves your funding objectives while simultaneously maximizing the opportunity for electoral success.

As you are no doubt aware, securing the two-thirds supermajority voter support required to approve many California local finance measures (including those sponsored by cities and special districts) that dedicate revenue for specific projects frequently presents a significant challenge for public agencies and their supporters. Our experience suggests that this challenge is often even greater for local finance measures that provide dedicated funding for recreational facilities, which voters often view as amenities which are “nice to have,” but that they frequently consider more akin to “wants” than “needs,” and to which they tend to assign relatively lower priority than traditionally higher-profile local issues and services such as education, transportation, and public safety. Therefore, while FM3’s voter opinion survey research would comprehensively evaluate whether a dedicated tax or G.O. bond measure to fund the new Senior and Community Recreation Facility are viable, we also suggest exploring alternative revenue measure concepts in parallel to a dedicated tax/G.O. bond so as to provide the agencies with multiple options moving forward. A more detailed discussion of this recommended approach is provided in **Section 3** of this proposal.

Since FM3 submitted our initial proposal in February 2020, the COVID-19 pandemic has greatly altered lives, priorities, and political views. Uncertainties and sentiments about public health, public safety, unemployment, the economy (local and nationwide), inflation and, most recently, rising gas prices and Russia’s war on Ukraine have contributed to a constantly changing electoral context. FM3 research is designed to assess this context to assist our clients in understanding voter priorities and to develop the most effective educational communications that address voter sentiment, and we believe this understanding is all the more important in this complex environment. Throughout the pandemic, FM3 research has been gauging how COVID-19 is impacting voters’ willingness to support revenue measures—including assessing perceptions of optimism or pessimism that give us a potential glimpse into how they may choose to vote in elections still months away.

More broadly, we believe working with FM3 offers the agencies a number of specific advantages in studying the viability and path forward to funding the Senior and Community Recreation Facility. These include the following:

- 1. FM3 is a leading provider of research for successful local tax and bond ballot measures in California.** Our research has contributed to voter approval of over 600 finance measures for California agencies (including 66 on the November 2020 ballot alone), with a success rate greater than 95 percent.
- 2. FM3 has unique experience providing research to help pass local special tax measures for recreational facilities and related infrastructure.** Local special tax measures providing financing for community centers and their related infrastructure are relatively uncommon in California. FM3 is one of few research firms that have worked on multiple successful measures of this kind, including two of the largest such measures approved by voters—the Los Angeles County Park & Open Space District’s Measure A assessment in 1996, and its successor, the parcel tax also called “Measure A” approved by voters in 2016. FM3 Research also helped the City of Piedmont pass Measure UU in 2020, a 19.5 million dollar bond measure for the repair and upgrade of the City’s pool—with funding measures for pool facilities historically the most challenging to pass.
- 3. FM3’s experience in Ventura County—including the City of Camarillo specifically in 2021—help us understand the local electorate and issues landscape and document changes over time.** FM3 has conducted over 100 survey projects in Ventura County since 2000, exploring a variety of issues for clients including the Cities of Oxnard, Santa Paula, and Ventura; the Camarillo Unified School District, Ventura Water, the Ventura County Transportation Commission; Ventura County Environmental and Energy Resources Department; and the Southern California Association of Governments, among others. This portfolio includes dozens of surveys and focus groups among PVRPD and City of Camarillo voters over the last two decades, documenting the opinions of hundreds of unique individuals and providing an enormous stock of contextual data that will enhance how we design, interpret, and report your research. This enables FM3 to analyze the attitudinal and demographic changes at work in your community over time.
- 4. FM3 is an industry leader in conducting accurate, reliable research that incorporates innovative digital methodologies.** Our firm is a recognized leader at implementing new, digital research methodologies that provide the same level of statistical validity and precision as a traditional telephone survey, while reaching greater numbers of respondents at a lower cost. For this project, FM3 recommends using our firm’s dual-

mode survey methodology (with text messaging), which leverages the latest web-based survey tools and traditional telephone interviewing to reach the most representative cross-section of likely voters. FM3's dual-mode surveys have demonstrated their precision over the course of the last four election cycles, helping guide more than 150 local finance measures to victory for agencies throughout California.

5. FM3 delivers personalized client service, and every FM3 survey is unique and customized for our client.

Every FM3 project is personally led by one of our firm's Partners, each of whom is a nationally respected authority on public opinion research in their own right. If FM3 is fortunate enough to be selected for this project, I (FM3 Partner Dr. Richard Bernard) will be delighted to serve as Project Manager and will work alongside the FM3 team consisting of Vice President Adam Sonenshein as Assistant Project Manager, Research Associate Laura Covarrubias as Research Team Member, and Partner and Chief Technology Officer Renato Villacorte as Lead Statistician. We will design, interpret, and present every aspect of your research and its findings, and will remain available and involved with your project right up until Election Day (and beyond, as needed). Our team will also be assisted by at least five additional staff members on fielding, data processing, graphic presentations, and quality control. FM3's in-house Data Processing and Graphic Design Departments allow us to meet the inherent demands of even the most aggressive deadlines and to provide a wider variety of services than would otherwise be possible – such as performing advanced statistical analysis to reap the greatest possible insight from your data.

6. FM3 features a local presence & accessibility, with all the benefits that these provide.

Although FM3 regularly conducts opinion research in communities throughout California, the United States, and abroad, it is Southern California that has always been home - to our firm and the majority of our staff, as well as to the voters and communities that we know best. FM3 is headquartered a relatively short drive from the agencies in West Los Angeles, and we are always willing to make the drive up the 101 Freeway to Camarillo to meet with you in person to discuss your project, present results, and help you leverage our research to achieve your goals.

Further, in addition to offering FM3's services in completing the research services outlined by the RFP, we have also taken the initiative to offer an optional set of supplemental public outreach and communication services to help achieve the agencies' funding objectives. These services would be provided by **TBWBH Strategies**, an industry-leading San Francisco-based firm. Together, FM3 and TBWBH constitute one of the most effective research/communications teams in California. **Our past collaborations have helped secure billions of dollars in new, voter-approved funding** for agencies as vast as Los Angeles County (parcel tax Measure W for stormwater infrastructure in November 2018 and parcel tax Measure A for parks in November 2016), and the nine-county Bay Area Metropolitan Transportation Commission (bridge toll surcharge Regional Measure 3 in June 2018), and as localized as the City of Santa Fe Springs (sales tax Measure Y in November 2018) and the Manhattan Beach Unified School District (parcel tax Measure MB in June 2018). FM3 is currently working with TBWBH on behalf of the Desert Recreation District to assess the feasibility of funding measures in Indio and Cathedral City, respectively. Information about the optional services offered by TBWBH is provided in **Section 11** of this proposal.

As a further optional task, in case you currently do not have a financial consultant lined up, NBS Government Finance Group is interested in discussing their services with your team. NBS is a leader in providing financial consulting for special districts such as yours. FM3 is currently a sub on the NBS consulting team as part of our current work with the Desert Recreation District.

As an FM3 Partner, I am authorized to contractually obligate and negotiate on behalf of our firm. If selected, a contract and insurance certificate will be provided in substantially the same form as provided in Attachment A, without modification. FM3 is prepared to enter into this contract within 30 days of Board approval, as requested.

The FM3 team would be very pleased to work with the Pleasant Valley Recreation and Park District and the City of Camarillo to help ensure the success of this important project. If you have any questions regarding this proposal or would like any additional information, please do not hesitate to contact me directly. We appreciate your time evaluating our submission, and we thank you very much for your consideration.

Sincerely,



Richard Bernard, Ph.D., Partner
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3 PROJECT UNDERSTANDING

FM3 understands that the agencies are seeking research to determine the viability of a local revenue measure to fund the construction and ongoing operation of a new Senior and Community Recreation Facility.

To identify the path forward that provides the greatest opportunity for you to achieve this objective, your research must provide reliable, quantitative data that informs your decision-making across a range of critical factors, of which three interrelated questions stand out to FM3 as perhaps uniquely fundamental to your success, namely: what combination of funding mechanism, electoral venue, and election date are the most likely to result in the successful voter approval of the funding you need? Other important questions must also be addressed, such as what thematic/communications roadmap is most likely to succeed in building and solidifying the broad communitywide consensus required to approve a local finance measure, and what steps can the agencies (and your supporters/allies in the community) take to effectively mitigate the impacts of the negative arguments that will likely be heard from finance measure opponents?

In addition, your research must do all of this in a way that appropriately incorporates, and accounts for, the local issues and dynamics that make your community unique. Community-specific factors such as the condition and primary basis of your local economy (and its evolving role within the larger region); the pace of demographic/property growth and other manifestations of your community's demographic evolution over time (and related concerns among residents); recent high-profile local news narratives or controversies; your residents' views on (and experience regarding) the efficacy and performance of local government; and other unique aspects of your community's distinct local history and culture are among the long list of distinguishing characteristics that must be holistically integrated into the research design and data collection procedures.

The following pages outline our current thinking regarding how best to simultaneously achieve all of this in a manner that is both cost-effective and timely. We do not view our current thinking (as described within this section) as the last word on anything – rather, we see it as the starting point for a conversation that we hope our respective teams will be able to have together. Decades of experience developing research programs of every size, aim, and budget has convinced us that only the fusion of top-flight professional research expertise with comprehensive, ear-to-the-ground local knowledge and perspectives is able to produce public opinion research of the highest caliber, and this is exactly the collaboration we hope to share with you on this project.

Identifying the Optimal Funding Mechanism

We believe that the most direct route to securing funding for the construction and operation of the new Senior and Community Recreation Facility may be by achieving voter approval for a dedicated sales tax or parcel tax - two mechanisms that provide both the flexibility to utilize the revenue they generate for both construction and operational expenses, as well as the legal certainty that funds approved for the Senior and Community Recreation Facility cannot be diverted to other uses. However, given the two-thirds supermajority voter support required by either of these mechanisms, as well as the often-seen challenges in building such broad community consensus around dedicated funding measures for recreation facilities, we recommend that the survey research also explore a pair of additional funding mechanism options – namely, a general fund sales tax (from which some or all of the

revenue could be appropriated by the Camarillo City Council for the Senior and Community Recreation Facility) and a general obligation bond.

As illustrated by **Figure 1** below, each of these funding mechanism options possesses a unique profile of strengths and potential drawbacks that are important for the agencies to consider. In the figure, **Column 1** lists the four funding mechanism options discussed by the preceding paragraph, while **Column 2** identifies which mechanisms possess the flexibility to legally fund both construction (capital) and operational needs. **Column 3** illustrates which funding mechanisms provide legal protection against action by future policymakers to redirect the funds they generate for other uses not related to the Senior and Community Recreation Facility, while **Column 4** cites the level of voter support each mechanism requires for approval. Finally, **Column 5** indicates which of the agencies (the Pleasant Valley Recreation and Park District and the City of Camarillo, respectively) possess the necessary legal authority to utilize each funding mechanism, absent special enabling action by the State.

Figure 1: Key Characteristics of Funding Mechanism Options

(Column 1) Funding Mechanism Option	(Column 2) Eligible to Fund Both Construction & Operations	(Column 3) Revenues Protected from Diversion	(Column 4) Voter Majority Required for Approval	(Column 5) Agencies w/Authority to Levy
Dedicated Sales Tax	Yes	Yes	66.67%	City <u>only</u>
Parcel Tax	Yes	Yes	66.67%	City <u>or</u> District
General Fund Sales Tax	Yes	No	50% +1	City <u>only</u>
G.O. Bond	No (construction only)	Yes	66.67%	City <u>or</u> District

In addition to the four funding mechanisms detailed by Figure 1, it is important to note that the City of Camarillo possesses the authority to use a number of other, less common funding mechanisms, most of which are rarely (if ever) used to finance recreational facilities projects in California (examples of these alternative funding mechanisms include transient occupancy taxes, utility user taxes, and various types of business license taxes, among others). State law limits the funding mechanisms available to special districts such as PVRPD to parcel taxes and general obligation bonds. If the agencies have an interest in evaluating the viability of any of these alternative funding mechanisms among City of Camarillo voters, FM3 will be happy to discuss how doing so can be incorporated into this research.

Identifying the Optimal Electoral Venue

As well as informing your thinking regarding which funding mechanism is most viable/best suited for this project, FM3 also understands that the agencies intend to utilize this research to quantify which electoral venue (the Pleasant Valley Recreation and Park District or the City of Camarillo) provides the best opportunity for a successful finance measure. The survey would therefore explore the relative viability of parcel tax and G.O. bond measures

among each agency's respective electorate (as these two mechanisms are the only ones legally available to the PVRPD without special enabling action by the State), while Camarillo voters would also be asked about both dedicated and general fund sales tax measures which could be sponsored by the City. With regard to the parcel tax and G.O. bond measures (the funding mechanisms which would be tested in both the Park District and the City and that could be sponsored/levied by either agency), FM3's analysis of the survey data would provide a detailed assessment of any differences in support/opposition between voters in the City of Camarillo and those in the unincorporated areas of PVRPD. This statistical analysis would identify any differences significant enough to suggest a greater likelihood of success in one jurisdiction or the other.

Identifying the Optimal Election Date

A third major consideration regarding your finance measure that FM3's research will address is the question of timing – more specifically, when the agencies should place your finance measure before voters in order to maximize your opportunity for success. Historically, local finance measures have enjoyed higher passage rates when consolidated with the statewide general elections held in November of even-numbered years, with this phenomenon being most pronounced during presidential elections, when voter turnout (particularly among lower propensity voters, among whom numerous demographics that have traditionally favored finance measures are overrepresented) is at its highest. That said, we have provided research in many jurisdictions where there was little difference, if any, in the relative levels of support for a local finance measure between a primary and a general election, or between an odd-year municipal election and even-year election. We also have experience in situations where our research indicated that the demographic profile of a finance measure's supporters overlapped sufficiently with high-propensity voters that a lower turnout scenario, such as an odd-year special or municipal election, provided a better opportunity for success than an election featuring higher voter turnout.

Given the very specific nature of the public improvements that would be funded by your ballot measure, leveraging FM3's research to time your measure so that it coincides with the future election in which your measure's likely supporters (as identified by the research) comprise the greatest proportion of the relevant jurisdiction's electorate will be particularly vital to ensuring success. To this point, seniors (defined here as voters ages 65 and older) – a demographic which is heavily overrepresented among high-propensity voters – typically comprise a greater proportion of the electorate during odd-year special elections than is the case for even-year primary and general elections, as a result of the relatively less consistent voting habits of many younger voters. The implications of this difference have the potential to be enormously significant, as seniors as a group are frequently less supportive of local finance measures than their younger neighbors – a pattern which may or may not hold true for this project, which involves a finance measure specifically for the purpose of building and operating a facility from which seniors are likely to disproportionately benefit. If the District and City are interested in considering a special 2023 Election, FM3 will identify the respondents who are likely to vote in a special election from the full sample and provide recommendations as to whether a special election is a viable alternative.

Conducting Research that Reflects Your Community's Unique Context

Lastly, we note that FM3 is also mindful of the significant economic role played by the Camarillo Premium Outlets in your community. We understand that at present, the sales tax rate in City of Camarillo sits at the state minimum of 7.25%, with no supplemental sales tax increments being collected by public agencies at the municipal, countywide, or regional levels. This relatively modest (for California) sales tax rate – in combination with the substantial retail tax base provided by the Outlets – makes a sales tax measure a logical consideration for this effort. However, at the same time, if this mechanism is explored, FM3 understands the importance of measuring voters' perceptions of how a sales tax measure would impact the Outlets, and the local economy more broadly. On one hand, the argument can be made that a significant proportion of the funds generated by a sales tax measure would be paid by shoppers and visitors from other communities, thereby reducing the relative tax burden on local residents—a message that our research has shown to resonate with voters in many California communities, and that could easily do so in Camarillo as well. On the other hand, some fiscally conservative voters may harbor concerns that increasing the sales tax rate in Camarillo could lead shoppers to go elsewhere, negatively impacting the local economy.

FM3 is deeply familiar with each of these perspectives, and others, many of which are passionately held by voters throughout the dozens of California communities where we have conducted finance measure research, and that - like Camarillo - rely on their roles as regional hubs of retail and commerce to provide both economic opportunity and the revenue that supports the public services their residents enjoy. It is this degree of expertise and attention to detail – informed by our experience helping hundreds of clients (including many of your peer agencies) successfully achieve their objectives in analogous situations – that defines FM3's opinion research and enables us to craft research that seamlessly combines industry-leading best practices with a sensitivity to the factors and issues that make your community unique.

4 ABOUT FM3 RESEARCH

Fairbank, Maslin, Maullin, Metz & Associates (FM3 Research or FM3) is a California-based company with 23 full-time employees located in our Oakland and Los Angeles offices. We have been conducting public policy-oriented opinion research since 1981 on issues of major economic and social concern, such as budgetary issues and taxation; parks and recreational facility plans; constituent satisfaction with public services and support for policy proposals; public safety; education; transportation; health care; growth and property development; environmental protection; natural resource conservation and development; communications technology; energy development; and organizational branding.

In any given year, FM3 conducts hundreds of surveys and focus groups (as well as other types of opinion research), which we use to provide strategic insights and advice to our clients. All key FM3 staff members have advanced degrees in public policy and research methods, and/or extensive experience working in state and local government; and every FM3 project is personally led by one of our firm's Partners.

FM3 stays on top of the latest issues facing local governments through its work as the public opinion research firm for the League of California Cities. FM3 has served as the League's primary pollster for many years, and our research has contributed towards numerous victories for the League and its member agencies, both in the legislature and on the statewide ballot. In this capacity, we regularly conduct research at the statewide level as well as in dozens of communities throughout the state. Most recently, FM3 worked closely with the League to help preserve local authority over land-use and housing issues from encroachment by Sacramento and to shore up support for former Governor Brown's transportation funding package, Senate Bill 1. Our team also regularly conducts seminars and forums with the League to inform city leaders on how public opinion research can be used to address the concerns, needs and priorities of their residents, and to provide additional funds for city services.

Additionally, while our firm is not so big that you will wonder whom to call with your questions, we are big enough to have our own in-house data analysis/processing team and graphic design resources. This means we can provide our clients with a level of personal attention and service from firm Partners and other senior staff more often associated with much smaller organizations, while also providing rapid project turnaround and more sophisticated data analysis and presentations tailored to client needs, as one might expect from larger firms.

Furthermore, FM3 utilizes a variety of research tools designed to address each client's unique circumstances. Some of these tools are quantitative, such as surveys; some are qualitative, such as focus groups; and others fall somewhere in between. Additionally, we continue to utilize and experiment with newly evolving online and digital research approaches. Part of this involves FM3 actively monitoring methodological developments through our industry's trade association – the American Association for Public Opinion Research (AAPOR) – in order to provide our clients with the best tools to meet their research needs.

More detailed information about our company, services, and clients may be found on our website, www.fm3research.com.

5 RELEVANT EXPERIENCE

FM3 is a recognized leader in conducting research that helps California cities, counties, and special districts objectively evaluate the viability of passing local ballot measures to secure additional revenue. Our municipal clients represent a diverse cross-section of large and small cities, including suburban, urban, and rural communities. Furthermore, we work with cities, counties, and special districts throughout Southern California, the Central Coast, the Central Valley, the Bay Area, and Northern California generally.

Our research identifies the feasibility of a potential ballot measure (or measures); the most appropriate tax rate and revenue mechanism (sales tax, parcel tax, general obligation bond, transient occupancy tax, utility user tax, etc.); how voters would prefer additional revenue to be used; and how to phrase the ballot label language, as well as identifying legally permissible messages that will resonate most among that agency’s constituents when engaging in community outreach and education, thus providing a thematic and communications roadmap to securing the required level of support. The efficacy of this approach is demonstrated by our firm’s **success rate of over 95 percent** since its 1981 inception – with over 550 **local finance measures approved for California agencies** in every region of the state, more than any other research firm.

FM3 conducts nearly 200 surveys, on average, each year. Therefore, **Figure 2** presents FM3’s most relevant survey experience since 2016: successful revenue measure surveys conducted on behalf of local cities, counties, and special districts in California. Projects on which members of FM3’s proposed project team have worked are noted in the last column under “team members.” Other projects were led by other FM3 Partners and staff. FM3 would be happy to provide contact information for public agency project managers at the District’s and City’s request. A complete listing of local finance measures approved by California cities, counties, and special districts using FM3’s research services (including measures from the last 12 years, and earlier) is included as **APPENDIX A** to this proposal.

The remainder of Section 5 summarizes FM3’s experience conducting research and providing strategic advice on behalf of cities and special districts for the successful passage of sales tax, parcel tax, and bond measures—three funding mechanisms that may be of consideration for the agencies, among perhaps others.

Figure 2: FM3 California City/County/Special District Finance Measure Experience 2016-Present

Measure	Revenue Type	Rate Change	Date	Team Members
City of Canyon Lake (CA), Measure S	Utility Users Tax	No rate change	November 2018	Covarrubias Sonenshein
City of Desert Hot Springs (CA), Measure C	Utility Users Tax	No rate change	November 2017	-
City of Alameda (CA), Measure K1	Utility Users Tax	No rate change	November 2016	-
City of Sunnyvale (CA), Measure N	Utility Users Tax	No rate change	November 2016	-
City of Carson (CA), Measure C	Utility Users Tax	No rate change	June 2016	- Sonenshein

Measure	Revenue Type	Rate Change	Date	Team Members
City of Moreno Valley (CA), Measure G	General Purpose Sales Tax	1 Cent Sales Tax	November 2021	Bernard Covarrubias
City of Indio (CA), Measure E	General Purpose Sales Tax	1 Cent Sales Tax Extension	November 2021	Covarrubias
City of Corona (CA), Measure X	General Purpose Sales Tax	1 Cent Sales Tax	November 2020	Sonenshein
City of Los Alamitos (CA), Measure Y	General Purpose Sales Tax	1.5 Cent Sales Tax	November 2020	Sonenshein
City of Oxnard (CA), Measure E	General Purpose Sales Tax	1.5 Cent Sales Tax	November 2020	Sonenshein
City of Carson (CA), Measure K	General Purpose Sales Tax	$\frac{3}{4}$ Cent Sales Tax	November 2020	Sonenshein
City of San Bernardino (CA), Measure S	General Purpose Sales Tax	1 Cent Sales Tax Extension & Increase	November 2020	Sonenshein
City of Turlock (CA), Measure A	General Purpose Sales Tax	$\frac{3}{4}$ Cent Sales Tax	November 2020	Sonenshein
City of Paso Robles (CA), Measure J	General Purpose Sales Tax	1 Cent Sales Tax	November 2020	Sonenshein
City of Palmdale (CA), Measure AV	General Purpose Sales Tax	$\frac{3}{4}$ Cent Sales Tax	November 2020	Bernard Sonenshein
Contra Costa County (CA), Measure X	General Purpose Sales Tax	$\frac{1}{2}$ Cent Sales Tax	November 2020	
City of San Luis Obispo (CA), Measure G	General Purpose Sales Tax	1.5 Cent Sales Tax Extension & Increase	November 2020	Bernard Sonenshein
City of Morro Bay (CA), Measure E	General Purpose Sales Tax	1 Cent Sales Tax	November 2020	Bernard Sonenshein
City of Orinda (CA), Measure R	General Purpose Sales Tax	1 Cent Sales Tax Extension & Increase	November 2020	
City of Milpitas (CA), Measure F	General Purpose Sales Tax	$\frac{1}{4}$ Cent Sales Tax	November 2020	

Measure	Revenue Type	Rate Change	Date	Team Members
City of Lomita (CA), Measure L	General Purpose Sales Tax	¾ Cent Sales Tax	November 2020	Bernard Covarrubias
City of Petaluma (CA), Measure U	General Purpose Sales Tax	1 Cent Sales Tax	November 2020	
City of Healdsburg (CA), Measure T	General Purpose Sales Tax	½ Cent Sales Tax Extension	November 2020	
City of South Lake Tahoe (CA), Measure S	General Purpose Sales Tax	1 Cent Sales Tax	November 2020	Sonenshein
City of Bellflower (CA), Measure M	General Purpose Sales Tax	¾ Cent Sales Tax	November 2020	Bernard Covarrubias
City of San Jacinto (CA), Measure V	General Purpose Sales Tax	1 Cent Sales Tax	November 2020	Covarrubias
City of Commerce (CA), Measure VS	General Purpose Sales Tax	¼ Cent Sales Tax	November 2020	Covarrubias Sonenshein
City of Montclair (CA), Measure L	General Purpose Sales Tax	1 Cent Sales Tax	November 2020	Bernard Covarrubias
City of Imperial Beach (CA), Measure I	General Purpose Sales Tax	1 Cent Sales Tax	November 2020	Sonenshein
City of South El Monte (CA), Measure ES	General Purpose Sales Tax	¼ Cent Sales Tax	November 2020	Bernard Covarrubias
City of Exeter (CA), Measure P	General Purpose Sales Tax	1 Cent Sales Tax	November 2020	Bernard Covarrubias
City of Daly City (CA), Measure Q	General Purpose Sales Tax	½ Cent Sales Tax	November 2020	Sonenshein
City of West Hollywood (CA), Measure E	General Purpose Sales Tax	¾ Cent Sales Tax	November 2020	Bernard
City of Cotati (CA), Measure S	General Purpose Sales Tax	1 Cent Sales Tax Extension	November 2020	
City of Scotts Valley (CA), Measure Z	General Purpose Sales Tax	1.25 Cent Sales Tax	March 2020	Covarrubias

Measure	Revenue Type	Rate Change	Date	Team Members
City of Azusa (CA), Measure Z	General Purpose Sales Tax	¾ Cent Sales Tax	March 2020	Covarrubias
City of Paramount (CA), Measure Y	General Purpose Sales Tax	¾ Cent Sales Tax	March 2020	Bernard Covarrubias Sonenshein
City of Whittier (CA), Measure W	General Purpose Sales Tax	¾ Cent Sales Tax	March 2020	Bernard
City of San Gabriel (CA), Measure SG	General Purpose Sales Tax	¾ Cent Sales Tax	March 2020	Bernard Covarrubias Sonenshein
City of Norwalk (CA), Measure P	General Purpose Sales Tax	¾ Cent Sales Tax	March 2020	Bernard Covarrubias
City of Lakewood (CA), Measure L	General Purpose Sales Tax	¾ Cent Sales Tax	March 2020	Bernard Covarrubias
City of Montebello (CA), Measure H	General Purpose Sales Tax	¾ Cent Sales Tax	March 2020	Bernard
City of Monterey (CA), Measure G	General Purpose Sales Tax	½ Cent Sales Tax	March 2020	
City of Gardena (CA), Measure G	General Purpose Sales Tax	¾ Cent Sales Tax	March 2020	Covarrubias
City of Duarte (CA), Measure D	General Purpose Sales Tax	¾ Cent Sales Tax	March 2020	Bernard Covarrubias Sonenshein
City of Culver City (CA), Measure CC	General Purpose Sales Tax	½ Cent Sales Tax Extension	March 2020	
City of Reedley (CA), Measure B	General Purpose Sales Tax	¾ Cent Sales Tax	March 2020	Covarrubias Sonenshein
City of Alhambra (CA) Measure AL	General Purpose Sales Tax	¾ Cent Sales Tax	March 2020	Bernard Covarrubias
City of Long Beach (CA), Measure A	General Purpose Sales Tax	1 Cent Sales Tax Extension	March 2020	
City of Arcadia (CA) Measure A	General Purpose Sales Tax	¾ Cent Sales Tax	June 2019	- Sonenshein

Measure	Revenue Type	Rate Change	Date	Team Members
Santa Cruz County (CA), Measure G	General Purpose Sales Tax	½ Cent Sales Tax Extension	November 2018	-
Humboldt County (CA), Measure O	General Purpose Sales Tax	½ Cent Sales Tax Extension	November 2018	-
Yuba County (CA), Measure K	General Purpose Sales Tax	1 Cent Sales Tax	November 2018	-
City of Wildomar (CA), Measure AA	General Purpose Sales Tax	1 Cent Sales Tax	November 2018	Bernard
City of Santa Fe Springs (CA), Measure Y	General Purpose Sales Tax	1 Cent Sales Tax	November 2018	-
City of Santa Ana (CA), Measure X	General Purpose Sales Tax	1.5 Cent Sales Tax	November 2018	-
City of Sacramento (CA), Measure U	General Purpose Sales Tax	1 Cent Sales Tax Extension & Increase	November 2018	-
City of Roseville (CA), Measure B	General Purpose Sales Tax	½ Cent Sales Tax	November 2018	-
City of Porterville (CA), Measure I	General Purpose Sales Tax	1 Cent Sales Tax	November 2018	Bernard Covarrubias Sonenshein
City of Pomona (CA), Measure PG	General Purpose Sales Tax	¾ Cent Sales Tax	November 2018	Sonenshein
City of Pasadena (CA), Measure I	General Purpose Sales Tax	¾ Cent Sales Tax	November 2018	Bernard Sonenshein
City of Norco (CA), Measure R	General Purpose Sales Tax	1 Cent Sales Tax	November 2018	-
City of Martinez (CA), Measure X	General Purpose Sales Tax	½ Cent Sales Tax	November 2018	-
City of Los Banos (CA), Measure H	General Purpose Sales Tax	½ Cent Sales Tax	November 2018	-
City of Lawndale (CA), Measure L	General Purpose Sales Tax	¾ Cent Sales Tax	November 2018	Covarrubias

Measure	Revenue Type	Rate Change	Date	Team Members
City of La Puente (CA), Measure LP	General Purpose Sales Tax	½ Cent Sales Tax	November 2018	-
City of Glendale (CA), Measure S	General Purpose Sales Tax	¾ Cent Sales Tax	November 2018	-
City of Garden Grove (CA), Measure O	General Purpose Sales Tax	1 Cent Sales Tax	November 2018	Covarrubias
City of Culver City (CA), Measure C	General Purpose Sales Tax	¼ Cent Sales Tax	November 2018	-
City of Covina (CA), Measure CC	General Purpose Sales Tax	¾ Cent Sales Tax	November 2018	-
City of Carpinteria (CA), Measure X	General Purpose Sales Tax	1.25 Cent Sales Tax	November 2018	Covarrubias Sonenshein
City of Burbank (CA), Measure P	General Purpose Sales Tax	¾ Cent Sales Tax	November 2018	Bernard Sonenshein
City of Bakersfield (CA), Measure N	General Purpose Sales Tax	1 Cent Sales Tax	November 2018	Covarrubias Sonenshein
City of Antioch (CA), Measure W	General Purpose Sales Tax	1 Cent Sales Tax Extension	November 2018	-
City of Alameda (CA), Measure F	General Purpose Sales Tax	½ Cent Sales Tax	November 2018	-
City of El Monte (CA), Measure EM	General Purpose Sales Tax	½ Cent Sales Tax Extension	November 2017	-
City of Hawthorne (CA), Measure HH	General Purpose Sales Tax	¾ Cent Sales Tax	November 2017	Sonenshein
City of Larkspur (CA), Measure B	General Purpose Sales Tax	¾ Cent Sales Tax Extension & Increase	November 2017	-
City of Santa Barbara (CA), Measure C	General Purpose Sales Tax	1 Cent Sales Tax	November 2017	Bernard Sonenshein
City of Palm Springs (CA), Measure D	General Purpose Sales Tax	½ Cent Sales Tax	November 2017	Bernard Sonenshein

Measure	Revenue Type	Rate Change	Date	Team Members
City of Seaside (CA), Measure L, Seaside Vital City Services Measure	General Purpose Sales Tax	½ Cent Sales Tax	June 2017	-
City of Delano (CA), Measure U	General Purpose Sales Tax	1 Cent Sales Tax Extension	November 2016	-
City of Santa Paula (CA), Measure T	General Purpose Sales Tax	1 Cent Sales Tax	November 2016	Bernard
City of Ventura (CA), Measure O, Clean Water/Beaches/Street Repairs/Safety	General Purpose Sales Tax	½ Cent Sales Tax	November 2016	Bernard
City of Visalia (CA), Measure N	General Purpose Sales Tax	½ Cent Sales Tax	November 2016	Bernard
City of Vallejo (CA), Measure V, Sales Tax Measure	General Purpose Sales Tax	1 Cent Sales Tax Extension	November 2016	-
City of Santa Rosa (CA), Measure N, City Services Measure	General Purpose Sales Tax	¼ Cent Sales Tax Extension	November 2016	-
City of East Palo Alto (CA), Measure P	General Purpose Sales Tax	½ Cent Sales Tax	November 2016	-
City of Hollister (CA) Measure W, Public Safety/Essential Services	General Purpose Sales Tax	1 Cent Sales Tax Extension	November 2016	-
City of Temecula (CA), Measure S, 911 Emergency Response & Vital Services	General Purpose Sales Tax	1 Cent Sales Tax	November 2016	Sonenshein
City of La Quinta (CA), Measure G	General Purpose Sales Tax	1 Cent Sales Tax	November 2016	Sonenshein
City of Menifee (CA), Measure DD, Public Safety/Traffic Congestion/Vital Services	General Purpose Sales Tax	1 Cent Sales Tax	November 2016	-
City of Indio (CA), Measure X, Neighborhood Safety/Essential City Services	General Purpose Sales Tax	1 Cent Sales Tax	November 2016	Sonenshein
City of Hemet (CA), Measure U, Public Safety & City Services Measure	General Purpose Sales Tax	1 Cent Sales Tax	November 2016	Sonenshein
City of Riverside (CA), Measure Z, Public Safety/Vital City Services	General Purpose Sales Tax	1 Cent Sales Tax	November 2016	Sonenshein

Measure	Revenue Type	Rate Change	Date	Team Members
City of Fountain Valley (CA), Measure HH, 911/Police/Fire/Essential Services	General Purpose Sales Tax	1 Cent Sales Tax	November 2016	Sonenshein
City of Westminster (CA), Measure SS, Police/911/Essential City Services	General Purpose Sales Tax	1 Cent Sales Tax	November 2016	Sonenshein
City of St. Helena (CA), Measure D	General Purpose Sales Tax	½ Cent Sales Tax	November 2016	-
City of Wasco (CA), Measure X	General Purpose Sales Tax	1 Cent Sales Tax	November 2016	-
City of Lynwood (CA), Measure PS, Public Safety & Vital City Services Protection	General Purpose Sales Tax	1 Cent Sales Tax	November 2016	-
City of Downey (CA), Measure S, Transactions & Use Tax	General Purpose Sales Tax	½ Cent Sales Tax	November 2016	Sonenshein
City of Lakeport (CA), Measure Z, Public Safety/Essential City Services Measure	General Purpose Sales Tax	1 Cent Sales Tax	November 2016	-
City of Compton (CA), Measure P	General Purpose Sales Tax	1 Cent Sales Tax	June 2016	-
City of San José (CA), Measure B	General Purpose Sales Tax	¼ Cent Sales Tax	June 2016	-
City of Long Beach (CA), Measure A	General Purpose Sales Tax	1 Cent Sales Tax	June 2016	-
City of Pittsburg (CA), Measure M	General Purpose Sales Tax	½ Cent Sales Tax Extension	June 2016	-
Peninsula Corridor Joint Powers Authority [Caltrain] (CA), Measure RR	Dedicated Sales Tax	1/8 Cent Sales Tax	November 2020	
Sonoma County (CA), Measure M, Parks & Conservation Sales Tax	Dedicated Sales Tax	1/8 Cent Sales Tax	November 2018	-
City of Chowchilla (CA), Measure N, Chowchilla Public Safety Sales Tax	Dedicated Sales Tax	1 Cent Sales Tax	November 2018	-
City of Monterey (CA), Measure S, Street & Infrastructure Sales Tax	Dedicated Sales Tax	1 Cent Sales Tax Extension	November 2018	-
Santa Cruz County (CA), Transportation Sales Tax, Measure D	Dedicated Sales Tax	½ Cent Sales Tax	November 2016	-
Santa Clara County (CA), Transportation Sales Tax, Measure B	Dedicated Sales Tax	½ Cent Sales Tax	November 2016	-

Measure	Revenue Type	Rate Change	Date	Team Members
Los Angeles County (CA), Traffic Improvement Plan, Measure M	Dedicated Sales Tax	1 Cent Sales Tax Ext & Increase	November 2016	Bernard Sonenshein
City of Clearlake (CA), Measure V, Transactions & Use Tax for Road Maintenance	Dedicated Sales Tax	1 Cent Sales Tax	November 2016	-
City of Sanger (CA), Measure S, Public Safety Sales Tax Extension	Dedicated Sales Tax	¾ Cent Sales Tax Extension	November 2016	Sonenshein
San Geronio Memorial Healthcare District (CA), Measure H	Parcel Tax	Renew existing \$60.52 per parcel	December 2021	Bernard Sonenshein
Santa Clara Valley Water District (CA), Measure S	Parcel Tax	Renew existing 0.6 cents per square foot	November 2020	
City of Arcata (CA), Natural Open Space Preservation Parcel Tax, Measure A	Parcel Tax	Measure A \$37 per parcel	November 2020	
Los Angeles County Flood Control District (CA), Measure W	Parcel Tax	2.5 cents per square foot	November 2018	Bernard Sonenshein
Southern Marin Fire Protection District (CA), Measure I	Parcel Tax	\$200 per parcel	November 2018	-
City of Orinda (CA), Measure J, Library Parcel Tax	Parcel Tax	\$39 to \$69 Parcel Tax Increase	June 2018	-
City of Desert Hot Springs (CA), Measure B	Parcel Tax	Renew existing \$103-\$267.60 per parcel	November 2017	-
Mountain Communities Healthcare District/Trinity Hospitals (CA), 24 Hr. Emergency Room Parcel Tax, Measure G	Parcel Tax	Renew existing \$30-\$114 per parcel	November 2016	-
Apple Valley Fire Protection District (CA), Measure A	Parcel Tax	\$126.90 per parcel	November 2016	-
Monterey Peninsula Regional Park District (CA), Measure E	Parcel Tax	\$25.26 per parcel	November 2016	-
City of Culver City (CA), Safe/Clean Water Protection Measure, Measure CW	Parcel Tax	\$99 per parcel	November 2016	-
Los Angeles County (CA), Safe, Clean Neighborhood Parks, Open Space, Beaches, Rivers Protection, and Water Conservation, Measure A	Parcel Tax	1.5 cents per square foot	November 2016	Bernard
Rodeo-Hercules Fire Protection District (CA), Measure O	Parcel Tax	\$216 per parcel	November 2016	-
San Francisco Bay Restoration Authority (CA), Clean & Healthy Bay, Measure AA	Parcel Tax	\$12 per parcel	June 2016	-
City of San Francisco (CA), Health and Recovery Bonds, Proposition A	Bond Measures	\$487.5 Million Bond	November 2020	
City of Piedmont (CA), Community Pool Bond, Measure UU	Bond Measures	\$19.5 Million Bond	November 2020	
City of San Francisco (CA), Earthquake Safety & Emergency Response Bond, Proposition B	Bond Measures	\$628.5 Million Bond	March 2020	
Fair Oaks Recreation & Park District (CA), Bond Measure J	Bond Measures	\$26.9 Million Bond	November 2018	-

Measure	Revenue Type	Rate Change	Date	Team Members
City of San Jose (CA) Public Safety & Infrastructure Bond, Measure T	Bond Measures	\$650 Million Bond	November 2018	-
City of San Francisco (CA), Embarcadero Seawall Improvement Bond, Prop. A	Bond Measures	\$425 Million Bond	November 2018	-
Bay Area Rapid Transit District (CA), Measure RR	Bond Measures	\$3500 Million Bond	November 2018	-
City of Orinda (CA), Road and Storm Drain Repair Bond, Measure L	Bond Measures	\$25 Million Bond	June 2016	-
City of San Francisco (CA), Public Health and Safety Bond, Proposition A	Bond Measures	\$350 Million	June 2016	-
City of Inglewood (CA), Measure H	Transient Occupancy Tax	14% to 15.5% Increase	November 2021	Sonenshein
Tuolumne County (CA), Measure U	Transient Occupancy Tax	10% to 12% Increase	November 2020	
City of Half Moon Bay (CA), Measure U	Transient Occupancy Tax	12% to 15% Increase	November 2020	
City of Pismo Beach (CA), Measure B	Transient Occupancy Tax	10% to 11% Increase	November 2020	
City of Long Beach (CA), Measure B	Transient Occupancy Tax	6% to 7% Increase	March 2020	
City of Diamond Bar (CA), Measure Q	Transient Occupancy Tax	10% to 14% Increase	November 2018	Bernard Covarrubias
City of Daly City (CA), Measure VV	Transient Occupancy Tax	10% to 13% Increase	November 2018	Sonenshein
City of Sunnyvale (CA), Measure K	Transient Occupancy Tax	10.5% to 12.5% Increase	November 2018	Covarrubias
City of Palo Alto (CA), Measure E	Transient Occupancy Tax	14% to 15.5% Increase	November 2018	-
City of Milpitas (CA), Measure R	Transient Occupancy Tax	10% to 14% Increase	November 2018	-
Mariposa County (CA), Measure M	Transient Occupancy Tax	10% to 12% Increase	November 2018	Sonenshein
Calaveras County (CA), Measure G	Transient Occupancy Tax	6% to 12% Increase	November 2018	Bernard
Sonoma County (CA), Measure L	Transient Occupancy Tax	9% to 12% Increase	November 2016	-
City of Moreno Valley (CA), Measure L	Transient Occupancy Tax	8% to 13% Increase	November 2016	Bernard
City of Palm Desert (CA), Measure T	Transient Occupancy Tax	9% to 11% Increase	November 2016	-
City of Laguna Beach (CA), Measure LL	Transient Occupancy Tax	10% to 12% Increase	November 2016	Sonenshein
City of Richmond (CA), Measure I	Business Tax	Gross Receipts Tax	November 2020	

Measure	Revenue Type	Rate Change	Date	Team Members
City of Long Beach (CA), Measure US	Business Tax	\$0.15 per barrel increase oil production tax	November 2020	
City of San José (CA), Measure H	Business Tax	Cardroom Tax Rate Increase	November 2020	
City of West Hollywood (CA), Measure Y	Business Tax	7.5% on gross receipts (cannabis)	March 2019	Bernard
City of Mountain View (CA), Measure P	Other	Per Employee Tax	November 2018	-
City of Daly City (CA), Measure BB	Other	Business License Tax	November 2018	Sonenshein
Metropolitan Transportation Commission (CA), Regional Measure 3	Other	\$3 Bridge Toll Increase	June 2018	-
City of Long Beach (CA), Measure M	Other	Utility Funds Transfer	June 2018	-
City of Carson (CA), Measure C	Other	Petroleum Business Tax	November 2017	Sonenshein
City of San José (CA), Measure G	Other	Business License Tax	November 2016	-
City of East Palo Alto (CA), Measure O	Other	Landlord Business Tax	November 2016	-
City of Marina (CA), Measure U	Other	Business License Tax	November 2016	-

5.10 FM3 Municipal Finance Measure Experience on Behalf of California Cities

Since 2008, FM3 has helped pass at least one revenue measure in over 150 unique California cities. We make it a priority to work closely with each city and local stakeholder to design the research because we know every community is different and requires an approach that addresses its own unique characteristics and needs.

In 2020 alone, FM3’s research helped over 50 California cities pass ballot measures to provide funding for local public services. These cities include: **Alhambra, Arcata, Azusa, Bellflower, Carson, Commerce, Corona, Costa Mesa, Cotati, Culver City, Daly City, Duarte, El Monte, Exeter, Gardena, Half Moon Bay, Healdsburg, Imperial Beach, Lakewood, Lomita, Long Beach, Los Alamitos, Milpitas, Montclair, Montebello, Monterey, Morro Bay, Norwalk, Orinda, Oxnard, Palmdale, Paramount, Pasadena, Paso Robles, Petaluma, Piedmont, Pismo Beach, Reedley, Richmond, San Bernardino, San Francisco, San Gabriel, San Jacinto, San José, San Luis Obispo, Scotts Valley, South El Monte, South Lake Tahoe, Turlock, West Hollywood, and Whittier.**

The following California cities have engaged FM3’s research and consulting services since 2008 to successfully pass ballot measures to fund city services and programs: **Alameda, Alhambra, Antioch, Arcadia, Arcata, Arvin, Azusa, Bakersfield, Bellflower, Benicia, Berkeley, Big Bear Lake, Burbank, Capitola, Carson, Carpinteria, Canyon Lake, Cathedral City, Chowchilla, Clearlake, Cloverdale, Coachella, Commerce, Corona, Costa Mesa, Compton, Cotati, Covina, Culver City, Daly City, Delano, Desert Hot Springs, Diamond Bar, Dinuba, Downey, Duarte, East Palo Alto, El Monte, Exeter, Fountain Valley, Galt, Gardena, Garden Grove, Gilroy, Glendale, Grover Beach, Half**

Moon Bay, Hawthorne, Healdsburg, Hemet, Hercules, Hollister, Huntington Beach, Imperial Beach, Indio, Inglewood, Kingsburg, La Puente, Lakeport, Lakewood, Laguna Beach, La Mesa, La Habra, Lomita, Larkspur, Lathrop, Lawndale, Long Beach, Los Angeles, Los Banos, La Quinta, Lynwood, Marina, Martinez, Menifee, Merced, Milpitas, Montclair, Montebello, Monterey, Moreno Valley, Morro Bay, Mountain View, National City, Norco, Norwalk, Oakland, Orinda, Oxnard, Pacific Grove, Palo Alto, Palmdale, Palm Desert, Palm Springs, Paramount, Pasadena, Paso Robles, Petaluma, Piedmont, Pismo Beach, Pittsburg, Pomona, Porterville, Redondo Beach, Reedley, Richmond, Riverside, Rohnert Park, Roseville, Sacramento, San Anselmo, San Bernardino, San Francisco, San Gabriel, San Jacinto, San José, San Luis Obispo, Sanger, Santa Ana, Santa Clara, Santa Cruz, Santa Fe Springs, San Juan Capistrano, Santa Barbara, Santa Monica, Santa Paula, Santa Rosa, Sausalito, Scotts Valley, Seal Beach, Seaside, Selma, South El Monte, South Lake Tahoe, South Gate, South Pasadena, Stanton, Stockton, St. Helena, Sunnyvale, Temecula, Turlock, Vallejo, Ventura, Visalia, Wasco, West Hollywood, Westminster, Whittier, and Wildomar.

5.11 Sales Tax Experience

FM3 is the industry leader in providing research for successful local sales tax measures in California. Our research has aided California cities in securing voter approval for over 160 local sales tax measures as well as a further 41 successful sales tax measures at the county level. These successes include both general-purpose and special tax measures which established new local sales taxes, extended existing ones, or increased rates in communities where a city sales tax was already in effect.

FM3’s proficiency with this funding mechanism is further demonstrated by the fact that our research aided our California local agency clients with a total of 45 successful sales tax measures in 2020 alone, as illustrated by Figure 3 below. (A complete listing of FM3’s successful local sales tax measures in California is provided in APPENDIX A to this proposal.)

Figure 3: FM3 Successful Local Sales Tax Measures in CA (2020-2021)

Agency	Measure	Type	Tax Rate	Election Date
City of Moreno Valley (CA)	Measure G	General Purpose	1 Cent Sales Tax	November 2021
City of Indio (CA)	Measure E	General Purpose	1 Cent Sales Tax Extension	November 2021
City of Corona (CA)	Measure X	General Purpose	1 Cent Sales Tax	November 2020
City of Los Alamitos (CA)	Measure Y	General Purpose	1.5 Cent Sales Tax	November 2020
City of Oxnard (CA)	Measure E	General Purpose	1.5 Cent Sales Tax	November 2020
City of Carson (CA)	Measure K	General Purpose	¾ Cent Sales Tax	November 2020
City of San Bernardino (CA)	Measure S	General Purpose	1 Cent Sales Tax Extension & Increase	November 2020
City of Turlock (CA)	Measure A	General Purpose	¾ Cent Sales Tax	November 2020
City of Paso Robles (CA)	Measure J	General Purpose	1 Cent Sales Tax	November 2020
City of Palmdale (CA)	Measure AV	General Purpose	¾ Cent Sales Tax	November 2020

Agency	Measure	Type	Tax Rate	Election Date
Contra Costa County (CA)	Measure X	General Purpose	½ Cent Sales Tax	November 2020
City of San Luis Obispo (CA)	Measure G	General Purpose	1.5 Cent Sales Tax Extension & Increase	November 2020
City of Morro Bay (CA)	Measure E	General Purpose	1 Cent Sales Tax	November 2020
City of Orinda (CA)	Measure R	General Purpose	1 Cent Sales Tax Extension & Increase	November 2020
City of Milpitas (CA)	Measure F	General Purpose	¼ Cent Sales Tax	November 2020
City of Lomita (CA)	Measure L	General Purpose	¾ Cent Sales Tax	November 2020
City of Petaluma (CA)	Measure U	General Purpose	1 Cent Sales Tax	November 2020
City of Healdsburg (CA)	Measure T	General Purpose	½ Cent Sales Tax Extension	November 2020
City of South Lake Tahoe (CA)	Measure S	General Purpose	1 Cent Sales Tax	November 2020
City of Bellflower (CA)	Measure M	General Purpose	¾ Cent Sales Tax	November 2020
City of San Jacinto (CA)	Measure V	General Purpose	1 Cent Sales Tax	November 2020
City of Commerce (CA)	Measure VS	General Purpose	¼ Cent Sales Tax	November 2020
City of Montclair (CA)	Measure L	General Purpose	1 Cent Sales Tax	November 2020
City of Imperial Beach (CA)	Measure I	General Purpose	1 Cent Sales Tax	November 2020
City of South El Monte (CA)	Measure ES	General Purpose	¼ Cent Sales Tax	November 2020
City of Exeter (CA)	Measure P	General Purpose	1 Cent Sales Tax	November 2020
City of Daly City (CA)	Measure Q	General Purpose	½ Cent Sales Tax	November 2020
City of West Hollywood (CA)	Measure E	General Purpose	¾ Cent Sales Tax	November 2020
City of Cotati (CA)	Measure S	General Purpose	1 Cent Sales Tax Extension	November 2020
Peninsula Corridor Joint Powers Authority [Caltrain] (CA)	Measure RR	Dedicated Sales Tax	1/8 Cent Sales Tax	November 2020
City of Scotts Valley (CA)	Measure Z	General Purpose	1.25 Cent Sales Tax	March 2020
City of Azusa (CA)	Measure Z	General Purpose	¾ Cent Sales Tax	March 2020
City of Paramount (CA)	Measure Y	General Purpose	¾ Cent Sales Tax	March 2020
City of Whittier (CA)	Measure W	General Purpose	¾ Cent Sales Tax	March 2020
City of San Gabriel (CA)	Measure SG	General Purpose	¾ Cent Sales Tax	March 2020
City of Norwalk (CA)	Measure P	General Purpose	¾ Cent Sales Tax	March 2020
City of Lakewood (CA)	Measure L	General Purpose	¾ Cent Sales Tax	March 2020

Agency	Measure	Type	Tax Rate	Election Date
City of Montebello (CA)	Measure H	General Purpose	¾ Cent Sales Tax	March 2020
City of Monterey (CA)	Measure G	General Purpose	½ Cent Sales Tax	March 2020
City of Gardena (CA)	Measure G	General Purpose	¾ Cent Sales Tax	March 2020
City of Duarte (CA)	Measure D	General Purpose	¾ Cent Sales Tax	March 2020
City of Culver City (CA)	Measure CC	General Purpose	½ Cent Sales Tax Extension	March 2020
City of Reedley (CA)	Measure B	General Purpose	¾ Cent Sales Tax	March 2020
City of Alhambra (CA)	Measure AL	General Purpose	¾ Cent Sales Tax	March 2020
City of Long Beach (CA)	Measure A	General Purpose	1 Cent Sales Tax Extension	March 2020

5.12 Parcel Tax Experience

FM3 is a statewide leader in providing research to help pass parcel tax measures for California’s local agencies. Parcel tax measures can be among the most challenging local taxes to pass, given the required two-thirds approval threshold enshrined by Proposition 13. However, despite the challenges inherent in this financing mechanism, agencies throughout California regularly pursue—and secure—voter approval for local parcel tax measures. FM3 has aided numerous cities and special districts, as well as school districts, in the design of parcel tax measures that have achieved the threshold of support required for passage. Our experience has identified the most direct route to success with this funding mechanism: crafting ballot language that highlights the service and infrastructure improvements that were quantitatively found to be the highest priorities for local voters, while emphasizing strict accountability provisions written into the measure.

California agencies that have passed parcel taxes using FM3’s research and consulting services are shown in **Figure 4** below.

Figure 4: FM3 Successful Parcel Tax Measures (1988 – Present)

Agency	Tax Rate	Measure	Election Date
San Geronio Memorial Healthcare District (CA)	\$60.52 per parcel	Measure H	December 2021
Southern Marin Fire Protection District	City of Arcata (CA), Natural Open Space Preservation Parcel Tax	Measure S	November 2020
City of Arcata (CA), Natural Open Space Preservation Parcel Tax	\$37 per parcel	Measure A	November 2020
Los Angeles County Flood Control District	\$.025/sq. ft.	Measure W	November 2018
Southern Marin Fire Protection District	\$200	Measure U	November 2018

Agency	Tax Rate	Measure	Election Date
Tahoe-Truckee Unified School District	\$148	Measure AA	November 2018
Evergreen School District	\$125	Measure EE	November 2018
Manhattan Beach Unified School District	\$225	Measure MB	June 2018
Ravenswood City School District	\$196	Measure Q	June 2018
City of Orinda	\$69	Measure J	June 2018
City of Desert Hot Springs	\$267.60	Measure B	November 2017
Arcadia Unified School District	\$288	Measure A	March 2017
Los Angeles County Regional Park & Open Space District	\$.015/sq. ft.	Measure A	November 2016
Mountain Communities Healthcare District	\$114	Measure G	November 2016
Apple Valley Fire Protection District	\$126.90	Measure A	November 2016
Monterey Peninsula Regional Park District	\$25.26	Measure E	November 2016
City of Culver City	\$99	Measure CW	November 2016
Rodeo-Hercules Fire Protection District	\$216	Measure O	November 2016
San Francisco Bay Restoration Authority	\$12	Measure AA	June 2016
Marin Emergency Radio Authority	\$29	Measure A	November 2014
City of San José	\$29.84	Measure B	June 2014
Evergreen School District	\$100	Measure H	June 2014
Santa Clara Valley Water District	\$56	Measure B	November 2012
City of Wildomar	\$28	Measure Z	November 2012
Arcadia Unified School District	\$228	Measure A	March 2012
City of Riverside	\$19	Measure I	November 2011
Mountain Communities Healthcare District	\$118	Measure T	June 2011
Tahoe Truckee Unified School District	\$135	Measure A	March 2011
County of Marin	\$24	Measure M	November 2010
City of Desert Hot Springs	\$121	Measure G	June 2010
Milpitas Unified School District	\$84	Measure B	June 2010
City of Santa Cruz	\$94	Measure E	November 2008
Evergreen School District	\$90	Measure T	November 2008

Agency	Tax Rate	Measure	Election Date
Franklin-McKinley School District	\$72	Measure U	November 2008
City of Orinda	\$39	Measure E	June 2008
City of Monrovia	\$62	Measure L	February 2008
Mountain Communities Healthcare District	\$118	Measure P	November 2006
City of Santa Monica	\$84	Measure V	November 2006
City of San José	\$25	Measure S	November 2004
Palm Drive Healthcare District	\$155	Measure W	November 2004
East Bay Regional Park District	\$12	Measure CC	November 2004
City of Oakland	\$75	Measure Q	November 2004
Alum Rock Unified School District	\$100	Measure R	November 2004
County of Los Angeles	\$.03/sq. ft.	Measure B	November 2002
Santa Monica-Malibu Unified School District	\$98	Measure Y	November 2000
Consolidated Fire Protection District of Los Angeles County	\$66.06	Proposition E	June 1997
Santa Monica-Malibu Unified School District	\$68	Measure K	November 1994
Berkeley Unified School District	\$.095/sq. ft.	Measure B	November 1994
Santa Monica-Malibu Unified School District	\$58	Measure TT	November 1988

5.13 General Obligation Bonds Experience

FM3 is a leading provider of research for general obligation bonds across California. Our firm has worked on general obligation bonds for a variety of public agencies including school districts, community college districts, city governments, county agencies including parks and libraries, water districts, and fire districts. In just the 2018 and 2020 election cycles alone, our firm provided research for a total of 37 successful local G.O. bond measures in California, featuring a combined authorization of more than \$13.86 billion (illustrated by **Figure 5** below).

Figure 5: FM3 Successful Local G.O. Bond Measures in 2020

Agency	Measure	Authorization	Election
City of San Francisco (CA), Health and Recovery Bonds	Proposition A	\$487.5 Million	November 2020
City of Piedmont (CA), Community Pool Bond	Measure UU	\$19.5 Million	November 2020

Agency	Measure	Authorization	Election
Oakland Unified School District (CA)	Measure Y	\$735 million	November 2020
Clovis Unified School District (CA)	Measure A	\$335 million	November 2020
Sanger Unified School District (CA)	Measure C	\$150 million	November 2020
Bassett Unified School District (CA)	Measure BB	\$50 million	November 2020
Duarte Unified School District (CA)	Measure S	\$79 million	November 2020
Inglewood Unified School District (CA)	Measure I	\$240 million	November 2020
Pasadena Unified School District	Measure O	\$516.3 Million	November 2020
Whittier Joint Union High School District (CA)	Measure AA	\$183.5 million	November 2020
River Delta Joint Unified School District SFID #1 (CA)	Measure J	\$45.7 million	November 2020
River Delta Joint Unified School District SFID #2 (CA)	Measure K	\$14.6 million	November 2020
Manteca Unified School District (CA)	Measure A	\$260 million	November 2020
Citrus Community College District	Measure Y	\$298 million	November 2020
City of San Francisco (CA), Earthquake Safety And & Emergency Response Bond	Proposition B	\$628.5 Million	March 2020
Eureka City Unified School District (CA)	Measure T	\$18 million	March 2020
Fresno Unified School District (CA)	Measure M	\$325 million	March 2020
San Mateo Union High School District (CA)	Measure L	\$385 million	March 2020
Foothill-De Anza Community College District	Measure 6	\$898 million	March 2020
Fair Oaks Recreation & Park District	Measure J	\$26.9 Million	November 2018
City of San Jose	Measure T	\$650 Million	November 2018
City of San Francisco	Proposition A	\$425 Million	November 2018
Mount San Antonio Community College District	Measure GO	\$750 Million	November 2018
Chaffey Community College District	Measure P	\$700 Million	November 2018
El Monte Union High School District	Measure HS	\$190 Million	November 2018
Sanger Unified School District	Measure B	\$70 Million	November 2018

Agency	Measure	Authorization	Election
Placer Union High School District	Measure D	\$40.3 Million	November 2018
Placer Union High School District	Measure G	\$42.1 Million	November 2018
Natomas Unified School District	Measure L	\$172 Million	November 2018
South Monterey County Joint Union High School District	Measure R	\$20 Million	November 2018
South Monterey County Joint Union High School District	Measure Q	\$20 Million	November 2018
Hemet Unified School District	Measure X	\$150 Million	November 2018
San Diego Unified School District	Proposition YY	\$3.5 Billion	November 2018
Del Mar Union School District	Proposition MM	\$186 Million	November 2018
Vallejo City Unified School District	Measure S	\$194 Million	November 2018
Grass Valley School District	Measure D	\$18.8 Million	June 2018
Ravenswood City School District	Measure S	\$70 Million	June 2018

5.14 Experience with Open Space and Parks Districts

In just the past decade, FM3 has worked with numerous cities, counties, and park/recreation/open space districts in securing voter approval for local tax and bond measures for improvements to parks and recreational facilities. Currently, FM3 is working with the Conejo Recreation and Park District and the Desert Recreation District.

Our research has helped guide the passage of ballot measures that have provided funding for parks and open space across the country in **Los Angeles County (CA), City of Martinez (CA), City of San Francisco (CA), City of Piedmont (CA), Marin County (CA), Sacramento County (CA), Sonoma County (CA), the Beaumont Cherry Hill Valley Park and Recreation District (CA), the City of Scottsdale (AZ), Pima County (AZ), the Fair Oaks Recreation and Parks District (CA), the Town of Eagle (CO), Chaffee County (CO), Grand County (CO), Miami-Dade County (FL), Maui and Hawaii Counties (HI), the City of Missoula (MT), Town of Whitefish (MT), Missoula County (MT), the City of Newark (NJ), the Portland-area Metro Regional Government (OR), City of Bend (OR), the City of Cannon Beach (OR), City of Gresham (OR), the City of Medford (OR), the City of Tigard (OR), Deschutes County (OR), Tualatin Hills Park and Recreation District (OR), Willamalane Park and Recreation District (OR), Lackawanna County (PA), Monroe County (PA), City of Austin (TX), City of Houston (TX), City of San Antonio (TX), Salt Lake City (UT), Salt Lake County (UT), the City of Everett (WA), Bainbridge Island (WA), Benton County (WA), Pierce County (WA), and Thurston County (WA).**

FM3 has also conducted survey research for numerous statewide park funding measures. These have included all of **California’s statewide park funding measures – Propositions 68 (2018), 84 (2006), 40 (2002), 50 (2002), and 12 (2000) – as well as Florida’s Amendment 1 (2014), the largest conservation finance measure in U.S. history;**

Connecticut's Amendment 2 (2018); Rhode Island's Question 3 (2018), and Questions 5 and 6 (2012); New Jersey's Question 1 (2014) and Question 3 (2007); Missouri's Amendment 1 (2016), the fourth renewal of a sales tax funding parks and soil conservation; Oregon's Measure 76 (2010); Iowa's Question 1 (2010); The Minnesota Clean Water Land and Legacy Amendment (2008); the Clean Ohio ballot measure (Issue 2 – 2008); Pennsylvania's "Growing Greener" measure (2005); and Nevada's Question 1 (2002).

At the local level in California specifically, our research has raised hundreds of millions of dollars in dedicated funding for parks and other recreational facilities over the course of 18 successful ballot measures since 1996. This includes the Los Angeles County Regional Park & Open Space District's Measure A.

FM3 has conducted public opinion research for the Los Angeles County Regional Park & Open Space District since 2013, assisting in the passage of Measure A in 2016, the largest local park and open space measure of its kind in U.S. history. Following the defeat of a countywide ballot measure for parks and open space funding in the November 2014 election, the Los Angeles County Board of Supervisors directed the Los Angeles County Park & Open Space District to conduct a comprehensive assessment of the County's parks and recreation needs. Over the course of 14 months, this first-ever countywide assessment documented the parks and recreation needs—both met and unmet—of every city and unincorporated community throughout the County. FM3 supported this process by conducting five focus groups and two countywide surveys that qualitatively and quantitatively identified County residents' top priorities for parks and recreation improvements (both within their local community and at the regional level) as well as identified potential funding opportunities that County voters would be willing to support. Our research helped TBWBH (who were then serving as the District's outreach and communications consultant) determine the viability of the measure and helped create a roadmap for effective outreach and communication methods. After the completed assessment was delivered to the Board of Supervisors in May of 2016, the Board decided to fund the substantial unmet needs identified by the assessment by placing a new parcel tax, Measure A, on the November 2016 ballot, which was approved by Los Angeles County voters with 75 percent support. The County resolution for Measure A, as well as the ballot label language and summary, were all drafted using data from FM3's survey research; while outreach and communication efforts were led by TBWBH.

A complete list of California local parks and recreation funding measures passed using FM3's research and consulting services is provided by **Figure 6** below.

Figure 6: FM3 Successful Local CA Parks Funding Measures

<i>Agency</i>	<i>Measure</i>	<i>Total Authorization</i>	<i>Election</i>
City of Piedmont (CA), Community Pool Bond	Measure UU	\$19.5 Million	November 2020
Sonoma County	Measure M	1/8 Cent Sales Tax	November 2018
Fair Oaks Recreation & Park District	Measure J	\$26.9 Million Bond	November 2018
Monterey Peninsula Regional Park District	Measure E	\$25.26 per parcel	November 2016
Los Angeles County	Measure A	1.5 cents per square foot	November 2016
Fresno County	Measure Z	1/10 Cent Sales Tax Extension	November 2014
City of Wildomar	Measure Z	\$28 per parcel	November 2012
City of San Francisco	Measure B	\$195 Million Bond	November 2012
City of San Juan Capistrano	Measure Y	\$30 Million Bond	November 2008

City of Martinez	Measure H	\$30 Million Bond	November 2008
Sonoma County	Measure F	¼ Cent Sales Tax Extension	November 2006
East Bay Regional Park District	Measure CC	\$12 per parcel	November 2004
Fresno County	Measure Z	1/10 Cent Sales Tax	November 2004
City of San Jose	Measure P	\$228 Million Bond	November 2000
City of Los Angeles	Proposition CC	\$47.6 Million Bond	November 1998
City of Los Angeles	Proposition EE	\$35 Million Bond	November 1998
Los Angeles County	Measure A	Property Assessment	November 1996
City of Los Angeles	Measure K	Property Assessment	November 1996

5.15 Experience in Ventura County

FM3 has conducted over 100 surveys in Ventura County since 2000 on an array of issues, documenting the opinions of more than 32,000 voters in the County. Our clients have included a variety of public agencies, including city governments and county agencies. Most recently, FM3 conducted a resident satisfaction survey on behalf of the City of Camarillo in the fall of 2021 (see Section 8 references for a description of our work on behalf of the City of Camarillo) and explored the viability of a parcel tax for the Conejo Recreation and Park District in the spring of 2021 (also described in Section 8).

Our firm has provided research on a range of issues, including revenue measures to fund general services, cannabis, healthcare, and environment policies. Some of our current and past clients include **Ventura Water; the Cities of Oxnard, Santa Paula, and Ventura; Camarillo Unified School District; Ventura County Transportation Commission; Ventura County Environmental and Energy Resources Department; Southern California’s Association of Governments; and elected officials including County Supervisors Steve Bennett and Linda Parks as well as Assembly member Christy Smith (AD 38)**. Overall, our extensive experience in the County gives us a unique perspective that will provide additional value for this project.

Most notably, in 2016, FM3 provided research that helped secure passage of Ventura County’s Measure F, renewing the County’s Open Space, Agricultural and Rural General Plan (a county-wide Save Open Space & Agricultural Resources initiative, otherwise known as SOAR) through 2050, and helped defeat Measure C, which sought to open up more farmland and open space for development. FM3 was contracted by a private campaign to help identify voters’ priorities when it came to preserving open space in the County as well as educational messages that would help voters fully understand the purpose of Measure F. Our research also helped identify how to clarify confusion with the opposing Measure C, scheduled to appear on the same ballot. Our firm conducted a county-wide survey on a variety of issues related to open spaces and helped identify that one of the issues that resonated most with voters was allowing over-development that would convert the County’s open spaces into urban sprawl, similar to Los Angeles. On Election Day in November 2016, Measure F, which extended the SOAR initiative until 2050, passed with 58.52% voter approval. In contrast, a majority of voters voted against Measure C, defeating plans to release open space for commercial development.

In addition to our work extending SOAR, our firm has most recently conducted research for the City of Santa Paula, assisting in the passage of Measure T in 2016 and Measure N in 2018, raising approximately \$2.6 million annually

for the City. In 2016, our firm was also hired by the City of Ventura, providing research leading to the passage of Measure O, raising approximately \$10.8 million annually.

5.16 Experience Conducting Research on Recreation Facilities & Senior/Community Centers

As you may be aware, special tax and bond measures for community centers and their associated infrastructure are uncommon among California's local agencies, particularly compared to higher-profile funding needs such as public safety and transportation. This long-term trend is likely due, at least in part, to the perception that securing the two-thirds majority required to approve any special tax (or non-education bond measure) is inherently more challenging when the revenue is dedicated to public services or infrastructure that many voters consider to be neither "life-or-death," (such as public safety issues), nor utilized on a daily basis, such as public streets or rights-of-way. The challenge of securing two-thirds supermajority support for dedicated community center funding was vividly demonstrated in the City of Millbrae, where voters rejected a City bond measure on the November 2018 ballot that would have raised funding to rebuild a community center that had been lost to a fire – and that was defeated despite receiving 62 percent support.

As a result of this perception (often confirmed by survey research) that voters are unlikely to support additional dedicated funding for community centers and associated infrastructure, many communities finance these services and capital expenditures from their general fund, augmented when necessary with general fund tax measures approved at the less difficult, simple-majority support threshold. However, a handful of agencies have in fact been successful in seeking, and securing, voter approval for additional dedicated funding for local community centers and their infrastructure needs. FM3 is privileged to be among the few research firms that have participated in successful efforts to pass these measures in multiple jurisdictions for agencies as large and diverse as the **Los Angeles County Park and Open Space District** and the **City of Los Angeles**, and as small as the **City of Lawndale** and **City of Piedmont**.

Among our prominent early successes with local special tax and bond measures for community center funding are the Los Angeles County Park and Open Space District's **Measure "Baby" A**, approved by voters countywide in November 1996, and the City of Los Angeles' \$35 million bond **Measure EE**, approved in November 1998, which provided the funds to build the City's Exposition Park Intergenerational Community Center (EPICC, now called the EXPO Center) in one of Los Angeles' most underserved communities. **Additionally, in 2016 FM3's research helped pass the Los Angeles County Park and Open Space District's Measure A, a parcel tax to replace the expiring 1996 measure.** The measure provided needed funds to enhance and maintain neighborhood parks and recreation facilities, among other recreational spaces. Our portfolio of successful finance measures that have raised dedicated funds for local community centers includes measures for communities outside of California in **Oregon** and **Washington State** as well.

Most recently, our strategic advice helped the City of Piedmont, California pass Measure UU in 2020, a bond measure requiring a two-thirds threshold to support the repair and upgrade of the city's public pool. Historically, gaining voter support for funding measures designed to improve pool facilities has been the most challenging. The electoral context suggested no different in Piedmont: in a survey conducted in 2017, 70 percent of voters did not use the pool and only 19 percent felt the condition of the City pool was a serious problem. Yet in the 2017 survey

as well as a subsequent survey in 2020, FM3 Research helped identify the strongest elements of a potential measure and effective educational statements (particularly around the quality of life the pool contributes to in the community and the pool's lack of safety leading to its permanent closure).

5.16.1 Manhattan Beach Case Study

Our work on behalf of the City of Manhattan Beach regarding their Facilities Strategic Plan is illustrative of the work we do determining the viability of funding measures for recreation and park facilities and assessing priorities for such spending.

In 2007, FM3 conducted a survey among 500 likely voters, looking at two main bond measures: one for recreation facilities improvements and another to replace the existing library. Furthermore, in addition to evaluating a large recreation facilities measure, the survey assessed support for two smaller recreation facilities bond measures, with each focused on a specific area of the city. Not only did the survey develop ballot language to measure support for these potential measures, it also looked at the context which contributed to the level of support found. For example, the survey measured how serious a problem residents considered the condition of park and recreation buildings, as well as the condition of the local pool. It also evaluated the importance of and priority placed on various recreation services and facilities that could be included in a facilities plan for the City, including a skate park, multi-purpose recreation center, a multi-purpose community center (with rooms for art, music, drama, other recreation classes and a senior center), a new library, a community theater, a teen center, an indoor gymnasium with joint use with the local school district, additional parking, aquatic facilities, and a fitness center, among other proposals. The survey also tested educational communications that explained the needs and benefits of the potential recreation facilities and library measures, and evaluated the persuasiveness of these communications.

The survey found insufficient support to move forward with any of the recreation facilities bond measures. This, in part, reflected that there was little concern about the condition of these recreation facilities despite a notable awareness of the City's Facilities Strategic Plan. The survey found stronger support for a measure focused on replacing the library—although below the required threshold needed for passage. At the same time, replacing and improving the library ranked as one of the strongest priorities for use of any additional funds.

As a result of the findings, FM3 recommended conducting a follow-up survey among 400 voters to focus on a potential library measure given the broader objective of the previous research. The follow-up survey confirmed that level of support for a library bond and helped establish the reasons for such support (seeing it as a community asset, a gathering place, resource for students, etc.). Ultimately, Manhattan Beach was able to build the new library without a funding measure.

In 2015, FM3 was again retained by the City of Manhattan Beach to conduct a resident satisfaction survey (and employee satisfaction survey). Among other topics, the resident survey assessed opinions toward recreational facilities and programs, including youth programs, reconstruction of the city's public pool, updating and repairing

community meeting and recreation centers, and athletic field maintenance. Of particular focus was evaluating support for building a skate park in the city, including preferred locations and the size of such a park.

Our work on behalf of the City of Manhattan Beach highlights our experience—not only in assessing support for funding measures for park and recreation needs, but also asking the questions needed to understand the underlying context that influences the success of such measures.

FM3’s history of researching public support for community centers, including helping clients secure voter approval for these types of local finance measures and understand the conditions that make passage of such measures unlikely, has provided us with experience that is directly applicable to the work we would perform for the District and the City. FM3 would leverage this critical experience, along with our two-decade history of providing research for successful local special tax and bond measures for community center funding, on any research we perform for the District and the City.

5.17 Other Relevant Experience

- **FM3 has a track record of providing research that has helped pass local finance measures in fiscally conservative communities.** The District’s electorate includes significant populations of demographic groups who are traditionally more fiscally conservative, including registered Republicans and voters 50 and over. And while the partisan composition of the area has changed notably in the last two decades, FM3 is mindful of the more conservative subgroup of voters in the area. FM3 has extensive experience testing and developing ballot label language and legally permissible educational messages for measures that resonate with these voters. Our experience has found that conservative voters value essential public services, and they are generally willing to support local finance measures once they understand how additional funds will be spent and which accountability features are in place to ensure those funds are used efficiently and as promised to voters.

We anticipate that our experience helping frame local finance measures in a manner that appeals to your fiscally-conservative constituents and developing legally-permissible informational messages that resonate with them, is likely to play a particularly important role in the research we conduct for the District and City. Our past experiences with successful local finance measures indicates that younger Republicans, and younger Republican women in particular, have been more open to supporting local finance measures than GOP voters more broadly – a phenomenon that will bear careful examination in this research.

- **FM3 possesses in-house Spanish language capability and provides some of the highest-quality English-Spanish bilingual research available.** Our firm has conducted surveys bilingually in English and Spanish for more than three decades, and doing so is another one of our firm’s longstanding strengths. We are extremely sensitive to details such as the geographic and national differences in Spanish vocabulary and pronunciation, and we conduct hundreds of surveys and dozens of focus groups in Spanish every year. We understand the nuances of how Latino voters react – in aggregate terms – to local finance measures. Our survey design carefully accounts for the reality that Latino voters are not a monolithic group; rather, we seek to find the messages that resonate most strongly to earn their support based upon variables including (but not limited

to) gender, age, political party, primary spoken language, nation of birth, and national or ethnic community of origin. We have long-term relationships with call centers that employ regular, full-time bilingual interview staff members who have the strongest fluency in both English and Spanish. FM3 will leverage the experience and methodologies we have acquired and developed over three decades of conducting the highest quality English-Spanish bilingual survey research to enhance the research we conduct for the City.

6 PROJECT TEAM

FM3’s proposed project team consists of firm Partner Richard Bernard in the role of Project Manager, Vice President **Adam Sonenshein** as Assistant Project Manager, Research Associate Laura Covarrubias as Research Team Member, and Partner & Chief Technology Officer **Renato Villacorte** as Lead Statistician. FM3’s proposed team routinely works together to produce highly-accurate voter opinion research for our municipal clients throughout California. See **Figure 7** for a list of project team members, titles, roles on the team, and key responsibilities.

The primary FM3 project team members will be assisted by no less than five additional FM3 staff members, including those in data analysis and quality control, field management and operations, and graphic design presentation, to name a few areas.

Figure 7: Key FM3 Team Members & Responsibilities

Team Member	Title	Role on the Team	Key Responsibilities
Richard Bernard	Partner	Project Manager	Supervision of full project, drafting of questionnaire, lead analyst of results, presentation of findings
Adam Sonenshein	Vice President	Assistant Project Manager	Assistance with drafting of materials, analysis, and reporting
Laura Covarrubias	Senior Researcher	Research Team Member	Assistance with drafting of materials, analysis, and reporting
Renato Villacorte	Partner and Chief Technology Officer	Lead Statistician	Lead and manage statistical analysis

FM3 takes great pride in the superior service we provide to our clients, including the time and attentiveness provided by firm partners and other senior personnel. Consistent with this policy, Dr. Bernard, Mr. Sonenshein, Ms. Covarrubias, and Mr. Villacorte will each remain attached and committed to this project through Election Day, and will remain available to the District to conduct additional analysis of the research results, provide advice, or address other needs upon request.

Brief résumés of the key FM3 staff members assigned to this project are provided on the following pages.

DR. RICHARD BERNARD, PARTNER—PROJECT MANAGER

Dr. Richard Bernard joined FM3 after being on the faculty at the University of Toronto from 1999 to 2002. Richard has written surveys; conducted focus groups and one-on-one interviews; and routinely provides strategic advice for a diverse set of clients including cities, counties and special districts, K-12 and community college districts, non-profit groups, and for-profit firms. In Ventura County, Dr. Bernard served as FM3's Project Manager for the City of Santa Paula's Measure T and the City of Ventura's Measure O, both successful November 2016 sales tax measures. Further, Dr. Bernard recently completed a resident survey on behalf of the City of Camarillo, and he is currently working with neighboring Conejo Recreation and Park District in their efforts to test the viability of placing a parcel tax on a District ballot. Prior to COVID-19,

he also conducted a County-wide park and open space survey on behalf of Ventura County.

Richard has also been the lead researcher on projects examining resident satisfaction with local government services, and branding and marketing public agencies, non-profit organizations and development projects. His work provides a road map to help clients communicate with their population of interest.

Richard's public opinion research efforts have helped ballot measure campaigns raise billions of dollars for cities, counties, schools, transportation improvements; clean water and open space protection; libraries; and public safety funding initiatives. Between 2016 and 2018, his research led to the passage of the largest local annual water quality and water supply parcel tax, local transportation sales tax measure, and local park and open space parcel tax measure in U.S. history. His successful efforts reflect an extensive expertise facilitating voter approval of ballot measures involving such finance mechanisms as bonds, sales and parcel taxes, utility user taxes, transient occupancy taxes, and property owner fees.

Throughout his tenure at FM3, Dr. Bernard has helped ballot measure campaigns raise billions of dollars for California cities and other local government agencies. Some of his successful sales tax and parcel tax efforts have occurred in the cities of Santa Barbara, Burbank, Palm Springs, Pasadena, Porterville, San Luis Obispo, Tulare, Santa Monica, Ventura, Visalia, and Wildomar; as well as for the counties of Santa Barbara, Imperial, Fresno, Los Angeles, and Tulare. Some of Dr. Bernard's other municipal clients have included, or currently include, the cities of Alhambra, Agoura Hills, Bellflower, Beverly Hills, Calabasas, Coronado, Diamond Bar, Fresno, Folsom, Hemet, Goleta, Grover Beach, Hermosa Beach, Huntington Beach, Lakewood, La Mesa, Livermore, Lomita, Los Angeles, Long Beach, Moreno Valley, Morro Bay, Norwalk, Palo Alto, Pomona, Ranch Palos Verdes, Riverside, San Diego, San Juan Capistrano, Santa Margarita, Signal Hill, South El Monte, Torrance, Vista, Walnut, and West Hollywood. In many of these surveys, questions focus on recreation and park amenities and other community assets. Currently, he is working with the Desert Recreation District in their efforts to improve the recreation infrastructure in the City of Indio and bring new recreation facilities and programs to Cathedral City.

While at the University of Toronto, he taught research methods and statistics, and within his research dealt frequently with issues related to cities, employment, ethnicity, and families. He has published in such journals as East Asian Pacific Migration Journal, International Migration Review, and the Canadian Journal of Sociology. Prior to joining the faculty at University of Toronto, Richard was a Sloan Foundation post-doctoral fellow at The University of Chicago where he both designed and tested quantitative and qualitative research related to family, work and educational issues.

Education: Richard received an Honors B.A. at York University, a M.A. at McGill University and a Ph.D. at UCLA in Sociology. He is a former City of West Hollywood Transportation Commissioner. He may be reached at FM3’s Los Angeles office at (310) 428-1809, or via email at Bernard@FM3research.com.

ADAM SONENSHEIN, VICE PRESIDENT — ASSISTANT PROJECT MANAGER

Adam Sonenshein joined FM3 following over a decade of experience working on behalf of non-profit organizations and political candidates in California. He has conducted opinion research and provided strategic advice for dozens of clients including cities, counties, K-12 school and community college districts, special districts, non-profit organizations, business associations, candidates for political office, and ballot measure campaigns.



Mr. Sonenshein recently completed surveys of residents in Camarillo and Oxnard, and a survey of mobile home residents in the City of Ventura. Additional current and recent clients include the cities of Arcadia, Bakersfield, Bellflower, Burbank, Carpinteria, Carson, Cathedral City, Daly City, Downey, Hawthorne, Hemet, Inglewood, La Quinta, Laguna Beach, Los Alamitos, Los Angeles, Morro Bay, Palm Springs, Paramount, Pasadena, Pomona, Riverside, Sanger, San Clemente, San Luis Obispo, Santa Barbara, South Lake Tahoe, Temecula, West Hollywood, Vista and Westminster; the Desert Recreation District, Los Angeles County, Santa Cruz County, San Bernardino Associated Governments (SANBAG); the Bakersfield City School District, Central School District, Del Mar Union School District, El Monte Union High School District, Hemet Unified School District, Inglewood Unified School District, Placer Union High School District, San Diego Unified School District, Sanger Unified School District, Santa Barbara Unified School District; Eastern Municipal Water District, Irvine Ranch Water District and West Basin Municipal Water District; the League of California Cities and Southern California Association of Governments, among many others.

Prior to joining FM3, Mr. Sonenshein spent eight years with Los Angeles Universal Preschool (LAUP), a county-wide nonprofit organization which focuses on building public will for expanding access to quality preschools. He was responsible for developing the organization’s public policy, advocacy, and community involvement strategies. He also worked closely with elected officials, community leaders, non-profit partners, and grassroots stakeholders by directly advocating for public policy changes at the city, school district, county, state, and national levels.

Further, he has served as a consultant for political campaigns, coalitions, and public awareness campaigns in the San Francisco Bay Area.

Education: Adam Sonenshein received a B.A. in Political Science from Tufts University in 1998 and an M.P.P. from the UCLA Luskin School of Public Affairs in 2005 with awards for Outstanding M.P.P. Student of the Year and Outstanding Academic Achievement.

Laura Covarrubias, Research Associate — Research Team Member



A native of California's Central Coast, Laura Covarrubias joined FM3 in 2017 as a Research Associate. Her prior experience includes providing research and analysis on local economic issues for the City of Glendale's Economic Development Division and conducting an impact and needs assessment on Los Angeles Mayor Eric Garcetti's 10,000 Strong Veterans Hiring Initiative for the Los Angeles Veteran Coalition.

At FM3, Laura has worked with clients on a variety of policy issues, including parks and open space, environmental conservation, development, public transportation, education, homelessness, and revenue measures. Laura has worked on behalf of the Ventura County Open Space District, Ventura Water, and Casitas Municipal Water District

on conservation issues including water conservation, pollution of local waterways, and open space use. She has also worked on behalf of Conejo Recreation and Parks District in Ventura County and Desert Recreation District in Riverside County on issues related to open space use and access to recreational programs and facilities in their respective communities. Overall, Laura's research has led to the successful passage of over 40 local revenue measures, helping generate more than \$80 million in local revenue funds and \$505.5 billion in school bonds from measures passed across the state in the November 2020 election alone.

A native Spanish speaker, Laura also assists in ensuring FM3's research tools are effective at capturing the opinions of various Latino communities through ensuring accurate translations and appropriate cultural context. Laura has contributed to research on a variety of subjects relative to the Latino populations in California and across the US, including but not limited to, early childhood parenting and education; air quality along freeway gateways; participation in the U.S. Census; and undocumented immigration.

Education: Laura holds a Master's in Public Policy from the Sol Price School of Public Policy at the University of Southern California, and a Bachelor of Arts in Political Science with minors in Public Affairs and Geography from UCLA.

RENATO VILLACORTE, PARTNER & CHIEF TECHNOLOGY OFFICER — LEAD STATISTICIAN

Partner & Chief Technology Officer Renato G. Villacorte joined FM3 Research in 2002 as a Senior Statistician and consultant on research methodologies and advanced data analyses. Renato started his career in academia in Experimental Psychology where he developed expertise in data collection technologies, statistical programming, and predictive modeling. He taught Descriptive Statistics and other lower division Psychology courses at Cal State University, Los Angeles before entering a doctoral program at the University of California in 1996. At Cal, he pursued research in Psychophysics and conducted several studies with human subjects before taking his talents into the market research industry in 2000.



Prior to joining FM3, Renato was the Database Programming Manager and a Senior Market Research Analyst for Jackson National Life Insurance, a major financial services company. He analyzed and prepared reports based on financial transaction data and data collected from employee and sales associate surveys. As the Senior Analyst, he helped create and manage the company's Market Research Department and earned recognition as a SAS Certified Professional Programmer. Renato's technical expertise and leadership skills ultimately earned him the position of Database Programming Manager, where he trained and supervised several programmer/analysts.

Renato is now charged with developing and maintaining the research technologies of FM3 Research. The Researchers of FM3 depend on Renato's team to coordinate and organize the collection of qualitative and quantitative opinion research data, prepare analytical reports on collected data, and conduct advanced statistical investigations in support of research objectives. Renato also leads the team that conducts advertisement and marketing material testing with Perception Analyzer, a system that collects data using dials in a group setting. This technology has supported dozens of campaigns in evaluating the persuasiveness of television advertisements on the electorate.

Education: Renato Villacorte received his cum laude B.A. and M.A. in Psychology from California State University, Los Angeles and pursued a Ph.D. in Psychophysics from the University of California, Berkeley.

7 METHODOLOGY AND WORK PLAN

FM3 recommends conducting a 20-minute, dual-mode survey (with text message invitations) of 400 PVRPD registered voters who are likely to participate in the November 2020 statewide general election.

FM3 offers survey length options of either 15 or 20 minutes. **However, our recommendation is to use a 20-minute questionnaire for this survey**, as this length will provide the opportunity to evaluate support for various potential funding mechanisms, as well as the importance of a broader range of potential uses of measure funds, tax rates, ballot label language, and informational statements – increasing the level of information the agencies will have about the priorities and tax tolerances of your voters and thereby helping to position you for success. In addition, utilizing a 20-minute questionnaire will also enable the survey to more effectively evaluate the potential impact on voter support from other finance measure(s) which may appear on the ballot in the same election. FM3 suggests that this “cumulative finance measure” effect may be particularly important to understand in 2020 as statewide measures or potential county measures could be on the ballot alongside it.

With approximately 47,000 registered voters who are likely to participate in the November 2024 General Election, PVRPD has a moderately-sized electorate. **For an electorate your size, FM3 recommends using a sample size of 400 interviews for this project.** FM3 believes that a sample of this size will provide a balance between precision and cost-effectiveness. The margin of error for a sample of 400 is +/- 4.9 percentage points.

Surveying the population of likely November 2024 Presidential Election voters will also provide data on the perceptions of the smaller group of likely 2024 primary and 2023 special election voters, as these groups are a subset of those who are likely to vote in the Presidential Election. This will enable FM3 to compare support for and viability of a potential finance measure in both the June and November 2024 elections and a 2023 special election, providing the agencies with multiple options for when to place a measure before voters in order to maximize the opportunity for success.

Should the agencies wish to test multiple measures in the survey and to assess them in the November and June 2024 elections and a 2023 special election, we would suggest the option of conducting an additional oversample of approximately 100 2023 special election voters (the exact recommendation for the oversample will ultimately be based on the definition of 2023 likely special election voters which will be determined after factoring in turnout in the 2022 elections). This would produce a total sample size of 500, and would provide greater opportunity for meaningful analysis among this electorate. In this sampling scenario, when looking at the November 2024 electorate, the oversample of 2023 special election voters would be weighted down to its true proportion of that electorate.

Should the agencies choose to test a sales tax funding mechanism, only voters registered in the City of Camarillo would be asked questions about the sales tax.

Below, we provide details on our methodology and work plan. In response to the question posed in the RFP regarding which tasks will be completed or coordinated by the consultant versus the District staff, FM3 will manage all aspects of the work plan. Our services are all inclusive, including developing the questionnaire (including Spanish translation), ordering the sample, fielding the survey, and analyzing and presenting the results.

Typically, we ask our clients for specific information we need in order to write a customized survey, including facts and figures about the condition of current facilities, the degree of use or overuse experienced by facilities, growth rates in the City/District, unmet funding needs, funding consequences should the ballot measure not pass, and so on. We will also ask you to assist in working with the appropriate legal counsel (depending on the jurisdiction of the measure) to receive approval for the ballot language we are testing. And while FM3 will manage all aspects of the research project, all our work is done in coordination with the agencies, and we will secure all appropriate approvals at each stage.

Dual-Mode Methodology with Text Message Invitations

FM3 recommends the use of a **dual-mode, online and telephone (landline and wireless) interviewing methodology** for this survey. The contemporary approach for gathering statistically reliable data is to employ the traditional telephone survey methodology alongside the latest online survey applications, with invitations to take the survey online distributed to potential respondents via email and (in the case of cellular phones) by text message (please refer to **Figure 8** at right for an example of the latter). In instances where a potential respondent is randomly selected to take the survey online but does not promptly respond to the email invitation to do so (and a cellular telephone number for this individual is also available), FM3 will follow-up with a text message invitation, and an additional reminder as necessary. This relatively new survey contact approach has been found to improve response rates to online surveys. FM3’s use of text messages to distribute survey invitations has been vetted by independent legal counsel and determined to be in compliance with all applicable state and federal laws and regulations, including the U.S. Telephone Consumer Protection Act (known as the TCPA).

Combining the data from the telephone and online surveys produces an **all-inclusive, representative sample of the population of interest** as illustrated by **Figure 9** on the following page.

Figure 8: Sample Text Message Survey Invitation

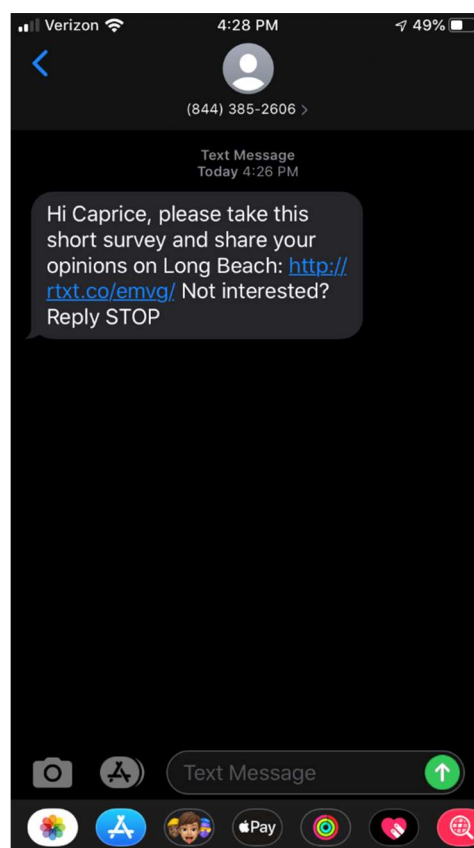
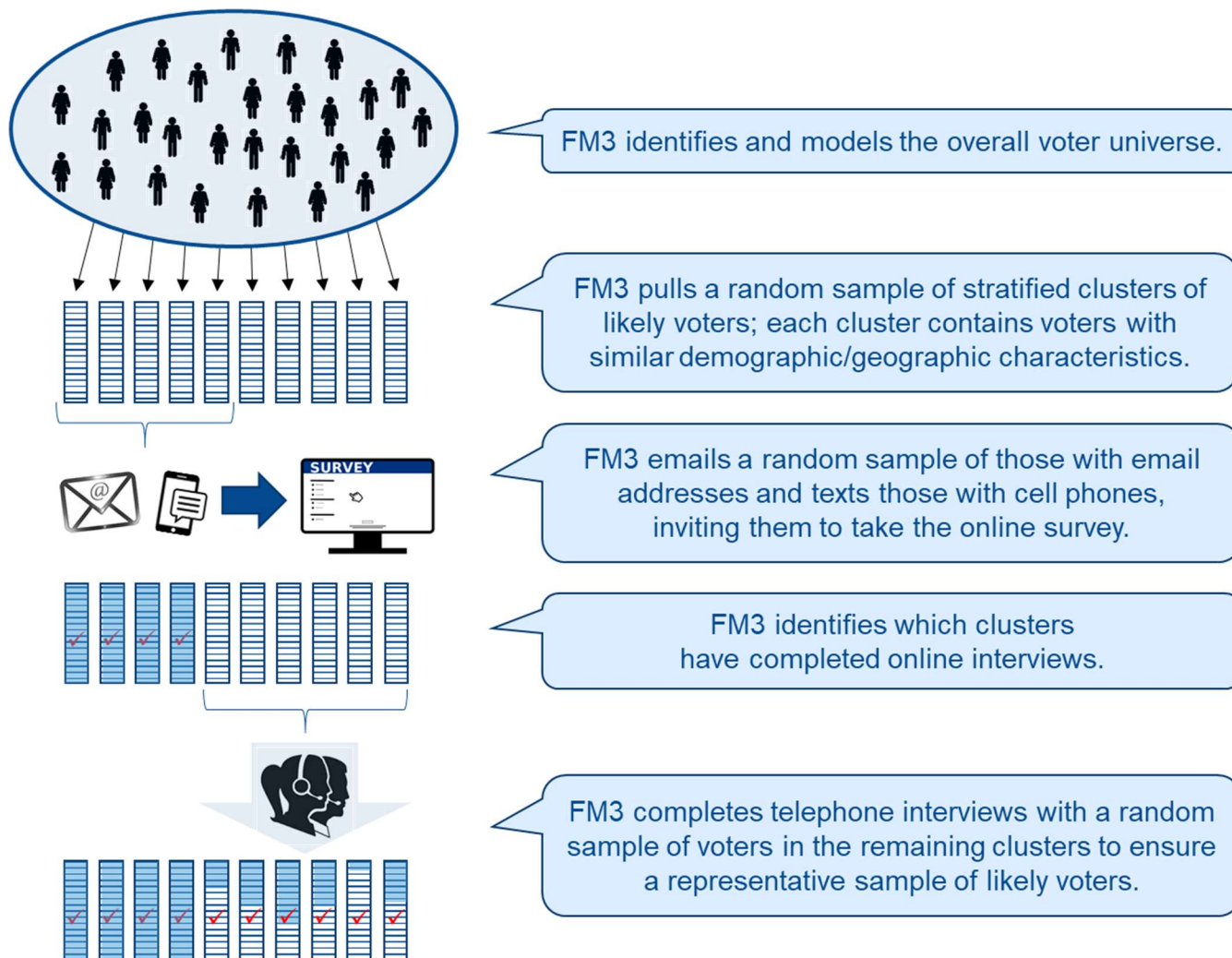


Figure 9: Illustration of FM3 Dual-Mode Voter Survey w/Test Message Invitations



Using this modern dual-mode survey methodology, FM3 collects survey data in two stages:

Stage One: Online Interviews

During this stage, FM3 will pull a randomized sample of the District’s likely voters. FM3 will collect email addresses for respondents in this sample from three sources:

- The Ventura County Clerk-Recorder/Registrar of Voters
- The agencies’ own records (if available)
- Matching the names of those who do not have an email address on file with the County Recorder/Registrar of Voters against a list of email addresses obtained from commercially available consumer records

Once FM3 has identified email addresses for the desired number of respondents, an invitation will be sent to the individuals for whom an email address is available. To encourage the greatest level of participation in the survey, we recommend using both the City's and the District's actual electronic seal or logo for this email invitation (to demonstrate the partnership), with the invitation electronically "signed" by a senior official from each agency. The invitation letter will explain that the City of Camarillo and the District have hired an independent public opinion research firm to conduct a survey about local issues that are relevant to its residents. The email invitation will provide a link for the voter to take the survey online. Three to four days after this initial email invitation is sent, a second reminder email will be directed to recipients who have not yet taken the survey, requesting that they do so.

In addition to sending out email invitations, FM3 will also distribute text message invitations to voters who have cellular telephone numbers, inviting them to take the survey online. Today, many voters' primary means for accessing the internet is their smartphone. During the email matching process, FM3 also identifies voters who have cellular telephone numbers. We invite these voters to participate in the survey by providing a link to the online questionnaire via text message. Recipients of the text message invitations will then be able to complete the survey using their smartphones. This approach is particularly effective at increasing survey response rates in smaller communities, helping provide a larger overall sample size and more precise survey results.

Stage Two: Telephone Interviews

Within a week of the initial email's distribution, FM3 will conduct a thorough examination of the demographic characteristics of those who have taken the survey online. By comparing the demographic characteristics of those who have completed the survey online with the attributes of the District's likely voter population as a whole, FM3 will note specific subsets that are either overrepresented or underrepresented in the online sample. In many communities, those who opt to take a survey online tend to be younger, more recent voter registrants, and have higher incomes than the broader electorate. **To control for attitudinal differences between voters who are more likely to respond to a survey online and those who prefer to participate via telephone, FM3 will take care to ensure a 50%-50% balance between the total number of online and telephone respondents to the survey.**

FM3 will then conduct further interviews with additional respondents by telephone. The telephone interviews will be conducted primarily among respondents who were underrepresented in the online sample, thereby producing an overall survey sample using both methodologies (online and telephone) that mirrors the District's likely voter population.

Given the composition of those who generally opt to take surveys online, it is likely that telephone interviews will be heavily concentrated among respondents ages 50 and over, and other groups that are less likely to have an email address on public record. FM3 will conduct a smaller number of telephone interviews among individuals whose demographic profile matches that of the online survey participants (but for whom no email address is available) to ensure the accuracy of the data produced by the initial, online portion of the survey.

Survey Length and Sample Design

As cited above, FM3 recommends conducting a 20-minute, dual-mode (telephone and online) survey with a sample of 400 likely November 2024 voters, with an optional 100 interviews among likely 2023 special election voters, depending on budgetary considerations. The survey would be conducted in English and Spanish.

We recommend a 20-minute survey to allow adequate opportunity to test a broader range of potential ballot language, funding mechanisms, and tax rate combinations—thereby increasing the likelihood of identifying a combination that aligns with voters’ priorities sufficiently to earn their support. A survey of 20 minutes in length typically allows for 55-70 unique questions while a 15-minute survey would allow approximately 40 to 55 unique questions.

A sample of 400 interviews will allow the research team to not only analyze different funding mechanisms and electorates, but also key demographic groups such as gender, age, education, party registration, race/ethnicity, geography, and other variables of interest, and cross-tabulate these variables against the responses to each survey question.

The November 2024 sample size of 400 interviews would yield a margin of sampling error of ± 4.9 percentage points for the November 2024 electorate. After the June and November 2022 elections, we will have a better sense of the proportion of likely 2023 special election voters based on turnout scenarios that include the 2022 elections. However, if we assume that among this sample of 400, approximately 200 will also be likely 2023 special election voters, this sample of 200 would have a margin of error of approximately ± 7.1 percentage points. If conducting an oversample of 100 2023 special election voters is preferred, this will produce a margin of error of ± 5.8 percentage points for the total sample of 300 2023 special election voters. Again, we will be able to provide the agencies with the definition of likely special election voters in 2023 after we factor in turnout from the 2022 elections.

KEY FACT:
A sample of 400 interviews will allow the research team to analyze key demographic groups such as gender, age, income, party registration, race/ethnicity, geography, and other variables of interest.

FM3 will utilize Political Data, Inc. (PDI) as its sample vendor. FM3 has worked with PDI, the leading voter sample vendor in California, for the last two decades. PDI provides the most up-to-date lists of voter names, addresses, telephone numbers (listed, unlisted, and cell phones), email addresses, voter party registration, and past voter history (in which past elections individuals have voted). The voter sample will consist of email addresses as well as landline and cellular telephone numbers provided by District residents when they registered to vote.

Additionally, **FM3 will work with third-party vendors to match names and addresses with other commercial vendor lists to ensure all phone numbers and email addresses are up to date.** FM3 is one of few public opinion research firms to use this technique to ensure that all eligible voters have the same likelihood of being contacted, regardless of whether they have changed their phone number or email address since registering to vote.

Questionnaire Design

In designing the research for this project, FM3 will draw from its knowledge of public opinion survey methodology, our comprehensive review of the District’s and the City of Camarillo’s past public opinion research (if available), the District’s current and future objectives and needs, and our vast internal library of past research.

The process will begin with an initial kickoff meeting, either in person or via teleconference, between FM3 and the District and City of Camarillo staff member(s) assigned to this project. The meeting will provide an opportunity for an extensive review of relevant background information and context, as well as a detailed discussion of the District’s objectives for the project. FM3 will then present a first draft of the questionnaire to the District/City of Camarillo team for review and comment.

After collecting feedback on the first draft, we will revise and refine the survey. We foresee proceeding through several drafts, incorporating feedback from District and City of Camarillo staff before each revision, to develop a research instrument that will obtain all the information desired. Before interviewing commences, FM3 will secure approval from the appropriate District and/or City representative on the final version of the questionnaire.

One of the key aspects of this survey will be determining, among several potential finance measures, which are viable at the ballot box. Our approach to testing multiple finance measure options on the same questionnaire has been developed over the course of several decades. While the final determination of which funding mechanisms to test (and whether initiated by the City or the District), as well as other questions, will be developed after consultation with all team members involved, FM3 anticipates some of the areas of inquiry will include the themes listed below.

- ✓ Do voters believe that the City of Camarillo or their local area (to include areas outside the City) is headed in the **right direction**, or do they see it as off on the wrong path?
- ✓ How do they rate their **quality of life and issue concerns** such as the condition of public parks and community centers and access to recreation programs?
- ✓ How do voters rate the **City’s and District’s performance on a number of metrics** that will influence opinions of the ballot measure? (This could be asked of unincorporated voters as well.)
- ✓ What do voters see as the most **pressing or serious problems** facing the City or area? This would include an assessment of COVID-19 impacts, including their concern about COVID-19, perceptions of the local economy, personal financial situation, views on gas prices and inflation generally—questions designed to understand how the ever-changing electoral context influences support or opposition for a funding measure.
- ✓ Do voters believe that the City/District has a **need for additional funding** to provide the level of services that residents need and want? (This is typically a reasonable generic proxy for finance measure support.)
- ✓ Do they perceive a need for more funding in specific areas, including recreation and senior facilities?
- ✓ Do voters know **who owns and manages the local recreational facilities they use**, including parks, community centers, fields, the indoor aquatic center, and the senior center? In other words, do they understand who provides these facilities (the special district or the City)—potentially important in determining the jurisdiction of the ballot measure?

- ✓ What is the current level of familiarity or **awareness regarding plans for a Senior and Community Recreation Facility?**
- ✓ Do voters **trust the City/District to spend taxpayers' money efficiently** and as promised?
- ✓ How do voters feel about the current **level of taxation** in the City/District?
- ✓ Which **funding mechanisms are most appealing** to voters (comparing jurisdictions and funding mechanisms)?
- ✓ What is the **maximum dollar amount voters will support?** (Total bond obligation and in annual tax rate per-assessed-value for a bond measure, price per assessed home value for a parcel tax, or sales tax increase.)
- ✓ Given realistic options, **how do voters prefer funds be spent?** How do voters **prioritize using funds** levied by a tax measure—both in terms of the senior and community facility (the gymnasium, multi-purpose room, etc.) and other area needs?
- ✓ How do voters respond to various configurations of **ballot label language, and which configuration elicits the strongest support?**
- ✓ How does the inclusion of **accountability measures**, such as annual independent financial audits, affect support for the bond?
- ✓ Which legally-permissible, non-advocacy **informational themes and messages** are most effective at building and solidifying support for a sales tax measure?
- ✓ Among the various negative messages likely to be utilized by opponents, which one(s) present the greatest threat to support for the measure, and what specific communication steps can the District/City and its supporters take to **inoculate its constituents from the impact of these negative arguments?**
- ✓ What are the **demographic, geographic, and socioeconomic characteristics** of the measure's supporters, opponents, and those who are undecided or open to changing their minds?
- ✓ Who are the **most credible spokespersons and organizations** to speak out publicly on behalf of the measure?
- ✓ How might the **presence of other local and countywide finance measures** impact support for the measure? Similarly, how might the presence of multiple finance measures on the statewide level impact support for it?
- ✓ What are voters' **sources of information for local city news?** Who do they perceive as trusted messengers on local issues?
- ✓ How often do they **use District facilities**, including parks, community centers, and other facilities?

In addition to collecting attitudinal and behavioral data, the survey will ask a variety of relevant demographic questions such as **race/ethnicity, age, education, family type** (does the respondent have children, and if so, what age(s) and do they live with them), and **income**, among others. Geographic data (the home address each respondent provided to the Ventura County Clerk-Recorder/Registrar of Voters when they registered to vote in the District), as well as partisan affiliation, will be provided by the voter file. This data will help identify consistent supporters and opponents of the measure as well as those who can potentially be persuaded to support the measure after additional education.

Spanish Translation

Given that approximately 18 percent of the District's likely November 2024 voters are of Latino or Hispanic origin, **we recommend translating the survey into Spanish so that respondents who would prefer taking the survey in that language have the option of doing so.**

Kandi Reyes of Kandi Reyes & Associates (KR&A) will translate the questionnaire into Spanish. Ms. Reyes' native language is Spanish; she is certified as a translator by the State of California, the Los Angeles County Metropolitan Transportation Authority (L.A. Metro), and the National Autonomous University of Mexico (UNAM), and she has translated hundreds of survey instruments for FM3 over the last 25 years. KR&A is certified as a Disadvantaged Business Enterprise (DBE), a Small Business Enterprise (SBE), a Women Business Enterprise (WBE) and Minority Business Enterprise (MBE).

Based upon FM3's experience, as well as industry-wide best practices, we recommend conducting telephone interviews in both English and Spanish, and online interviews in English only. Our experience and best practices suggest that conducting online interviews in Spanish is not usually cost-effective because very few eligible Spanish-dominant participants prefer to respond online in their respective language. However, we will be happy to provide costs to conduct online interviews in Spanish if the agencies desire.

Survey Pre-Testing (Telephone Interviewing Only)

Once approved for fielding, the questionnaire will be pre-tested with a small sample of District voters to assure ease of administration and flow. Such testing will also verify the length of the questionnaire and the survey questions' clarity and comprehensibility. The results of the pre-test will be reviewed with District and City staff and the project team to determine whether any adjustments are to be made before interviewing proceeds.

Interviewing

FM3 will subcontract all data collection services for this project, including web hosting, email/text message invitation distribution, online interviewing, and telephone interviewing services to KSG Research, with whom we have collaborated on hundreds of research projects over the years. KSG Research is one of the country's leading firms which handles the collection of web-based and telephonic public opinion research data. A member of the American Association of Public Opinion Research (AAPOR), KGS Research has provided data collection services for tens of thousands of successful research studies (both qualitative and quantitative) across dozens of U.S. and international markets.

The KSG's online interviewing platform is optimized to enable respondents to easily take the survey from either a personal computer or tablet/smartphone device, providing respondents with enormous flexibility regarding when and how they can participate. In addition, KSG's telephone interviewing facilities have well-established procedures to supervise the interviewing process and to verify that interviews are conducted according to specifications. Among these procedures is the monitoring of actual interviews by on-site supervisors, identification of each interview by interviewer, and the use of a regularly-employed staff of professional, full-time interviewers—including bilingual English-Spanish speakers. There is an established protocol for callbacks of busy or "not-at-home" numbers designed specifically to maintain the randomness of interviewee selection.

FM3 proposes to review its procedures with District and City representatives to ensure satisfaction with all technical aspects of the interviewing process.

Data Analysis

Response data will be analyzed by FM3's Data Processing and Analysis Department staff using Survey System and SAS software, both well-documented and widely used data analysis software packages. As needed, FM3 may augment Survey System and SAS with its own custom-designed statistical analysis program to report the tabulation and cross-tabulation of data. Our Data Processing and Analysis Department staff employs a data checking and editing system to eliminate errors and document the handling of data received from the interviewers.

Within one to two days after interviewing has been completed, FM3 will deliver an e-mail with the aggregate "topline" results of the survey to the District and City of Camarillo for initial internal review. These results will show the overall percentage of respondents that chose each answer for all of the survey's questions.

Within two to three days, FM3 will then provide the District and City of Camarillo with a comprehensive set of cross-tabulated results. The cross-tabulated results will include a table for each question or demographic variable in the survey, with a series of up to 200 columns indicating how various subgroups of District voters responded to that question. The cross-tabulated results will make it possible to detect how responses differ, if at all, among various subsets of the population. For example, it will be possible to compare answers provided by men and women, voters of various age categories and income levels, responses based on ethnicity/race, homeowners and renters, parents and non-parents, voters living in different areas of the District, and many more subgroups of the population.

It is worth noting that in previous research efforts, we have used an array of statistical analysis techniques to help our clients identify populations with distinct opinion characteristics and/or appropriate target audiences for public communications. These include factor analysis, cluster analysis, logistic regression, stepwise regression analysis, and Total Unduplicated Reach and Frequency (or TURF) analysis.

Finally, FM3's custom-designed data processing software package can convert the raw electronic data to ASCII format or virtually any other format commonly used. This will enable us to electronically transmit the actual results of the survey, including responses to open-ended questions, to the District and City of Camarillo at the conclusion of the study, if requested.

Reports and Presentations

Results of the survey can be presented both in person and in writing, depending on the District/City of Camarillo team's scheduling needs and preferences. This report will, at a minimum, take the form of a detailed PowerPoint presentation, but can take additional forms depending upon the District and City's needs. The report will explain the research design and methodology used and provide key detailed findings. It will also provide clear recommendations regarding how to use survey results to achieve your objectives, including which funding mechanism and electorate presents the greatest viability and how to communicate most effectively with the public about the measure. FM3 will present a draft report for consideration by the City/District and revise it based on your review.

After FM3's report and presentation have been completed, FM3 will remain available to answer follow-up questions from the District and City of Camarillo and present results to key stakeholders. We view all survey responses as an ongoing data resource; should the need arise, FM3 can undertake further analysis to provide answers to follow-up questions that may be posed by the District, the City of Camarillo, or other interested parties. We look forward to working with the District/City Liaison Committee and presenting at public meetings as requested to advance the measure.

Deliverables

Upon conclusion of the survey research, the District and City of Camarillo team will have received from FM3 each of the documents listed below. All documents can be provided in hard copy or electronic form (or both), depending on the District's and City's preference.

- **Final survey questionnaire**
- **Detailed written report and PowerPoint presentation** (a first draft for review and then a revised presentation, including graphic presentation of key findings, overall and subgroup results, conclusions, and actionable recommendations)
- **In-person or online presentation of results to District/City staff & elected officials**

8 SCHEDULE

FM3 is prepared to begin work on this research project immediately and would approach it in three distinct phases: research design, data collection, and data analysis and reporting. One of our firm's strengths is the ability to complete a course of research quickly and efficiently. **Figure 10** on the following page presents a draft outline of the timeframe within which project milestones will be completed. While this timeline describes a process that takes five to eight weeks, we will be happy to accelerate or otherwise adjust this timeline in order to best accommodate the agencies' needs.

Furthermore, we view the survey results as an ongoing resource for our clients and, at the conclusion of Phase 3, FM3 would remain available for ongoing consultation and any further analysis and presentation of the research, as needed, including helping to develop the 75-word ballot title and summary, should the agencies decide to proceed with placing a measure on the ballot.

Figure 10: Dual-mode (w/Text Messaging) Voter Survey Phases & Timeline

Phase 1 - RESEARCH DESIGN - (2 weeks)

- Kick-off meeting/confirmation of research specifications
- Review necessary background materials
- Draft, refine, and finalize survey questionnaire
- Draft, refine, and finalize invitation email
- Finalize sample parameters and order/prep sample
- Translate survey questionnaire into Spanish
- Program and test survey questionnaire

Phase 2 - DATA COLLECTION - (2-3 weeks)

- Send email/text message invitations and reminders (as necessary)
- Analyze demographics of online survey respondents
- Initiate and conduct telephone interviews
- Continually review responses and sample quotas
- Begin development of cross-tabulated report structure

Phase 3 - DATA ANALYSIS & REPORTING - (2-3 weeks)

- Generate topline survey results
- Generate cross-tabulated results
- Conduct statistical analysis
- Generate PowerPoint presentation of key findings, conclusions, and actionable recommendations
- Present findings

9 REFERENCES

**City of Camarillo**

Reference: Michelle Glueckert D'Anna, Community Relations Officer

Phone: Telephone: [\(805\) 388-5370](tel:(805)388-5370)

Email: mdanna@cityofcamarillo.org

In the fall of 2021, FM3 conducted an address-based dual-mode City of Camarillo survey (online and by telephone) among a random sample of 600 Camarillo adult residents. Residents were contacted by e-mail, telephone (landline and cellular) and text message to respond to a survey that examined their views of the City and more specifically their awareness of the Camarillo Airport, and their willingness to support modifying the existing 1976 agreement between the City and the Ventura County Department of Airports to allow for scheduled commercial airline passenger service and cargo service at the airport. The survey demonstrated that a majority of residents opposed the modification of the agreement. The results were presented at a City Council meeting and helped inform the Council on how the City would move forward if they were approached by the County to consider renegotiating the agreement.

**Conejo Recreation & Park District**

Reference: Jim Friedl, General Manager

Phone: 805-381-1239; Cell 805-341-8791

Email: jfriedl@crpd.org

In the spring of 2021, FM3 worked closely with Conejo Recreation & Park District staff to draft and administer a dual-mode survey (online and by telephone) among a random sample of 582 likely November 2022 District voters. The primary goal of the survey was to test the feasibility of a potential parcel tax. However, the survey helped gauge voter awareness of the District, the perception of whether the District needs additional funds, and identified the importance voters place on the service, programming and infrastructure maintenance and improvements the measure could fund. The survey also provided a roadmap on how to best educate the community in a legally permissible, non-advocacy manner, on the need for additional funds. If the District's board chooses to move forward this summer and place the measure on the ballot, FM3 will work with the District's legal counsel to help draft a possible measure title and 75-word summary for the board's consideration.

**County of Ventura**

Reference: Tina Wang, Management Analyst, County Executive Office

Phone: Telephone: (805) 654-2205**Email:** Tina.Wang@ventura.org

In February 2020, Ventura County commissioned FM3 to develop and field a Ventura County Open Space District Baseline Survey among a random sample of 913 registered voters. The survey was administered both online and by telephone and available in English and Spanish. The primary objectives of the survey were to test the feasibility of a potential ballot measure that would protect, preserve and/or upgrade open space and natural areas, farmlands, local rivers, lakes, creeks, coastal waters and beaches. Also included in the proposed package of public benefits was the desire to purchase park land; upgrade and maintain parks and local hiking, walking and biking trails; upgrading campgrounds and repairing park bathrooms and playground equipment.

Most respondents received similar questions so that the survey could adequately reflect the population of interest. However, given the variation both in demographic characteristics and ideological views of residents above and below the Conejo Grade coupled with differences in their respective proximity to ocean, open space and farmlands, FM3 developed unique questions for East and West County residents respectively. The survey identified both similar importance ratings across the County for some infrastructure projects; as well as having verified anticipated differences in project priority based on location in the County. While a number of projects were strongly supported, FM3's analysis of the research findings indicated that at the time of the survey, the two-third, super-majority, measure was not viable and FM3 recommended that if the County still wanted to move forward with the measure significant educational outreach would be necessary. The lead Supervisors on the project opted to place the project on hold just as COVID-19 began to be the major focus of County and elected officials.

**Reference:** Nathan Hamburger, City Manager**Phone:** (818) 597-7308**Email:** Nhamburger@agourahillscity.org

At the beginning of 2020, FM3 conducted a dual mode survey (online and by telephone) among a random sample of 421 City of Agoura Hills adult residents. The survey had three main objectives, with the first determining whether residents received information about proposed development projects in the City and if residents felt they had opportunities to express their views. The second goal was to examine whether residents perceived the City

lacked or had sufficient recreational and nature-oriented opportunities, as well as retail and entertainment venues and community gathering amenities. Finally, the third goal was to determine the level of support for a proposed mixed-use development project being considered by the City Planning Commission and the City Council expected to include retail, office and residential uses, while designed to maintain Agoura Hills' small town character, with preserved open spaces, equestrian trails and scenic views. The survey helped identify where best to communicate information about development projects being considered in the City as well as what elements of the project residents highly valued.

**Monterey Peninsula Regional Park District****Reference:** Dr. Raphael Payan, General Manager**Phone:** (831) 372-3196 Ext. 101**Email:** payan@mprpd.org

In 2015 and 2016, FM3 provided voter opinion survey research (consisting of two surveys – one baseline and one tracking survey, respectively) that aided the Monterey Peninsula Regional Park District in passing a ballot measure converting a 1990's-era, legally-questionable benefit assessment into a parcel tax measure. Ultimately, Measure E overwhelmingly passed by MPRPD voters with 71 percent support in November 2016, to provide \$1.2 million annually in ongoing funding to help preserve beaches, parks, trails, playgrounds, wildlife habitat, and other natural areas.

Fair Oaks Recreation & Parks District**Dates:** February to November 2018**Reference:** Mike Aho, District Administrator**Phone:** (916) 966-1036 Ext. 10**Email:** maho@forpd.org

The Fair Oaks Recreation and Park District in Sacramento County passed a \$26.9 million bond measure in November 2018 with help from FM3 Research. The measure passed with 68.9% -- just above the two-thirds threshold required. Our polling had predicted a very close vote, and the research helped the District write a measure that emphasized the most important elements of the District's work to highlight in their communications and the ballot measure language itself – things like safety, bathroom repairs, and programs for children, families and senior citizens.

**Los Angeles County Regional Park and Open Space District****Dates:** November 2015 to November 2016**Reference:** Hilda L. Solis, Los Angeles County Supervisor. Contact: Cindy Chen, Chief of Staff**Phone:** (213) 379-4776**Email:** Cchen@bos.lacounty.gov

FM3 conducted two countywide surveys which quantitatively identified Los Angeles County residents' top priorities for parks and recreation improvements (both within their local community and at the regional level) as well as identified potential funding opportunities that County voters would be willing to support. This was a joint project with FM3 and TBWBH. TBWBH developed outreach and education strategies, leading to the success of Measure A in 2016.

**City Ventura****Dates:** April 2015 to November 2016**Reference:** Elena Brokaw, Lead Consultant at Brokaw Jackson Consulting (Former City of Ventura Parks, Recreation, and Community Partnership Director)**Phone:** (805) 804-7144**Email:** elenambrokaw@gmail.com

FM3 and TBWBH also worked together in 2016, helping the City of Ventura analyze the viability of a revenue measure and create an outreach and education roadmap. Between 2014 and 2016, FM3 conducted three surveys on behalf of the City of Ventura. The initial survey, a resident satisfaction survey, examined respondents' perceptions of and attitudes toward City services. Our research helped inform the drafting of the 2015 baseline City sales tax feasibility survey, which examined support for a sales tax increase and voters' priorities for how the funds should be spent. The 2016 follow-up voter survey examined the level of support for the measure after education outreach had been conducted by the City and just prior to the Council deciding whether to place the measure on the ballot. The measure successfully passed in November 2016—a notable feat given the fact there was a local school measure parcel tax on the same ballot.

10 VOTER OPINION SURVEY RESEARCH COSTS

FM3 does not bill using hourly rates but rather by project, utilizing costs that are informed by the specifications of the research being conducted. For example, our costs for survey research are informed by factors that include the number of interviews completed, the average interview length, the interviewing methodology used (dual-mode, telephone, online, intercept, etc.), the type of sample being utilized (such as likely voters, all registered voters, all adult residents, etc.), and the language(s) in which interviews are conducted.

Below we present cost options for a 15- and 20-minute survey with a sample size of 400 respondents. However, we believe that a 15-minute survey is likely to be insufficient to ask the variety of questions needed to meet your objectives. In **Figure 11** below, we provide the cost for a 15- and 20-minute dual-mode survey with text messaging, conducted in English and Spanish among 400 respondents.

Figure 11: Dual-Mode (w/Text Messaging) Voter Survey Costs

Interview Length	n=400
15-minutes	\$29,000
20 Minutes	\$32,000

Should the agencies choose to incorporate the additional oversample of 100 likely 2023 special election voters (for a total of 500 interviews, including 300 among likely 2023 special election voters), the additional cost would be \$2,500.

The cost figures provided in the table above are all-inclusive, and reflect all charges for questionnaire development, survey hosting and emailing; telephone interviewing in English and Spanish; Spanish translation of the questionnaire; data entry; cross-tabulation; data analysis; and preparation and presentation of survey results. In addition, the price in **Figure 11** represents a commitment by FM3 to remain on call to the agencies, as needed, for the remainder of your bond measure project.

Should the District/City choose to not conduct the survey in Spanish, the cost would be reduced by \$2,500.

The only cost for additional presentations beyond the three covered in the costs above would be for mileage. FM3 charges the standard IRS business mileage rate for 2022 of \$0.585 per mile, which we estimate to be approximately \$54 round trip from our Los Angeles office to PVRPD’s administrative office located on E. Burnley Street in Camarillo.

Of course, there are many alternative research plans that could be developed; we’d be happy to work with you to design a modified plan that both fits your budget and satisfies your research needs. If you have any questions or would like more information, please do not hesitate to contact us. We would welcome the opportunity to work with you on this important project. Thank you for your consideration.

FM3 has no personal, professional or financial relationships with any office and/or employee of the District.

11 OPTIONAL POST-RESEARCH PUBLIC OUTREACH & COMMUNICATIONS SCOPE

(PROVIDED BY TBWBH STRATEGIES)



About TBWBH Props & Measures

TBWBH Props & Measures is a non-partisan strategy and communications consulting firm specializing in bond, tax and other public finance ballot measures supporting public programs, services and facilities. Props & Measures (formerly known as TBWB Strategies) launched in 2005 as an offshoot of Terris Barnes & Walters Political Media, operating in California since 1988.

Building Public Consensus in Communities Throughout California

Successful revenue measures are built upon a foundation of strong community consensus. We work with our clients to identify shared community priorities and values in order to identify the elements of a successful revenue proposal. We have built community consensus for revenue measures in hundreds of communities throughout our home state of California and many communities across the country. We know how to develop successful revenue proposals and communicate with voters in urban, suburban and rural communities.

Experience

The partners and consultants at Props & Measures have experience on over 500 successful public finance ballot measures that have raised tens of billions of dollars in voter-approved revenue for public programs, services and facilities. The successful measures include bonds, parcel taxes, sales taxes, transient occupancy taxes, utility users taxes, assessments and fees. We help cities, counties, school districts, community colleges, parks, water and open space districts, fire districts, libraries, healthcare districts, transportation and transit agencies and others.

Commitment to Client Service

We have found that a close partnership with attention to daily details is essential. We know public finance measures, and you know the community you serve. We also understand that the reputation of your institution is at stake when you seek funding from your community. It's not enough just to "win," but the measure and the related messaging must help you strengthen your relationship with your community.

In-House Graphic Design, Digital Media and Production Coordination

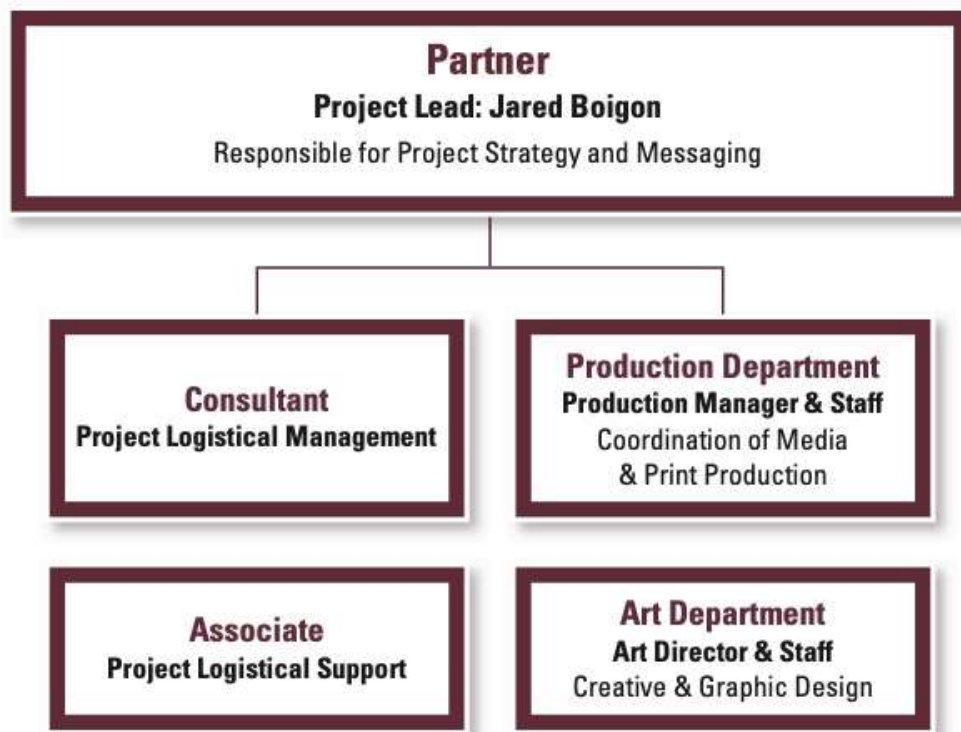
Props & Measures is one of the few firms in our industry that maintains an in-house Art Department and Production Department, to produce award-winning, creative concepts and attend to all the details required for efficient and timely delivery of digital media and printed materials. Our team will make sure your materials are given the necessary attention to deliver your message to your constituents effectively and on time.

Multimedia Communications

Local residents receive their information in a variety of ways. We offer innovative multimedia communication plans that deliver your message through a combination of direct mail, email, online display advertising, pre-roll video advertising and social media advertising to ensure a thorough reach to voters and maximize visibility. Props & Measures has unmatched experience blending traditional and new media strategies to maximize the impact of your message.

Project Leadership & Support

Props & Measures has seven experienced partners with the time and capacity to give your effort the devoted senior-level attention it deserves. Props & Measures maintains the largest and best-trained support team in our industry. No other political communications firm in the State is as well-prepared as we are for the demands of a busy election year.



Consultant Biographies

Jared Boigon, Partner

Jared Boigon joined TBWBH Props & Measures' parent firm, Terris Barnes & Walters, in 2001, and helped launch TBWB Strategies in 2005 to focus exclusively on helping public agencies prepare and pass tax measures.

Today, TBWBH Props & Measures is California's top public revenue campaign firm, having raised tens of billions of dollars in local revenue for schools, colleges, cities, counties, special districts and other public programs in California and a half-dozen other states.



Jared has personally guided over one hundred successful efforts producing voter-approved revenue for school districts, community colleges, cities, counties and special districts. His work includes multiple public education efforts for Los Angeles County agencies, leading to voter approval for various essential programs, including the nation's largest urban parks funding measure for LA County Regional Parks & Open Space Measure in 2016. He's also guided many other parks, recreation and open space ballot measures.

Jared began working in grassroots campaigns in the early 1990s. He later worked as speechwriter and policy analyst for then-Colorado Governor Roy Romer. He helped pass over a dozen local public finance ballot measures in his home state of Colorado before coming to join TBW in California. Jared graduated cum laude from Amherst College in 1994.

Jared's extensive experience in political campaigns, from volunteer organizer and campaign manager to media consultant, helped him guide his mother's successful citywide election to the Denver City Council in Spring 2003, where she outpaced six competitors to win an at-large open seat in her first-ever bid for elected office. (She retired from City Council in 2011.)

TBWBH Props & Measures Experience

COMBINED EXPERIENCE OF TBWB'S PARTNERS



With experience on nearly 500 successful local funding measures for all types of public agencies, TBWBH has worked in virtually all parts of our home state.

We've passed measures in sparsely populated rural areas, suburban communities in Northern and Southern California as well as the urban neighborhoods of California's biggest cities.

Cities and Towns

City of Alameda
 City of Barstow
 City of Burlingame
 City of Campbell
 City of Chula Vista
 City of Colton*
 Town of Corte Madera
 City of Crescent City
 City of Del Mar
 City of Diamond Bar
 City of Downey
 City of Emeryville
 City of Fairfield
 City of Foster City
 City of Fremont
 City of Glendale
 City of Gustine
 City of Kerman
 City of La Verne
 City of Lafayette
 City of Laguna Beach
 City of Lancaster

City of Lomita
 City of Los Altos
 City of Madera
 City of Manteca
 City of Marina
 City of Merced
 City of Montebello
 City of Monterey
 City of Morgan Hill
 City of Murrieta
 City of Oceanside
 City of Orinda
 City of Pacifica
 City of Palmdale
 City of Palm Springs
 City of Palo Alto
 City of Paramount
 City of Pleasant Hill
 City of Pomona
 City of Port Hueneme*
 City of Redwood City
 City of Salinas

Town of San Anselmo
 City of San Bernardino
 City of San Gabriel*
 City of San Jose
 City of San Mateo
 City of San Rafael
 City of Santa Cruz
 City of Santa Fe Springs
 City of Santa Monica
 City of Santa Rosa
 City of South Lake Tahoe
 City of South Pasadena
 Town of Truckee
 City of Union City
 City of Vacaville
 City of Ventura
 City of Watsonville
 City of Whittier
 Town of Windsor
 City of Yuba City

(Partial List)
 *Projects managed by Charles Heath while at a prior firm.

Our Approach and Scope of Services



We have a proven general approach to successful revenue measures that follows five critical steps. Within each step, we customize a set of strategies and tactics to address the specific challenges, circumstances and nuances for each of our projects.

STEP 1: Feasibility study to determine if and under what conditions Pleasant Valley Recreation & Parks District can pass a local funding measure.

STEP 2: Build consensus with outreach and awareness-building strategies that position your measure for success.

STEP 3: Build a strong measure by aligning the measure’s features with the community’s priorities and sensitivities.

STEP 4: Campaign for the win by efficiently getting your message out to persuade voters and mobilize your base of support.*

The first three steps in this process are typically led by the public agency pursuing the revenue measure as part of the process to evaluate, plan and prepare a measure for the ballot. All publicly-funded communication during this phase must be informational and not advocacy.

**Campaign advocacy, once a measure is on the ballot, must be coordinated by an independent campaign committee using private resources. No public funds or resources may be used.*

Step 1: Feasibility Study

Props & Measures will help you assess the basic viability of a potential revenue measure and identify the strategic elements needed to maximize the chances for success. During the feasibility study we'll help you tackle the most basic strategic questions that must be answered in order to identify a path to success.

Props & Measures will work with FM3 Research to help you answer:

- What are the highest priorities for public funding in the community?
- Is it reasonable to think that a funding measure can be successful with voters? At what vote threshold?
- Are voters most likely to support a bond measure? A parcel tax? Another type of tax? At what tax rate?
- What specific projects are voters most likely to fund?
- What is the optimal timing for a measure going to the ballot?
- Does sufficient community awareness of your needs already exist, or is proactive outreach required to build awareness?
- What are the key messages voters need to hear and what are the most effective channels for communication?
- How might specific exemptions or accountability protections be included in a successful measure?
- What controversies or competing issues must be considered before moving forward?

To answer these questions our team will carefully assess your needs, funding options and competing issues in the community. To obtain a statistically reliable understanding of current attitudes and opinions in your community, Props & Measures will partner with FM3 Research to develop and conduct a survey of local voters.

We'll help you analyze the results and turn the data into an actionable plan for moving forward. We'll also help you interpret and present recommendations to your administrative team, Board of Directors and other key stakeholders to build consensus around a unified strategic approach.

Step 2: Public Outreach & Education

Based on the findings from the survey and feasibility assessment, Props & Measures will help develop and implement a public information and outreach program to educate the community about your funding needs and build broad community consensus around a revenue solution.

Specifically, Props & Measures will:

- Develop informational messaging and a plan for getting the message out to key audiences
- Provide talking points, answers to frequently asked questions and a message training to key staff, employee groups and elected officials that will be speaking publicly about this issue
- Creation of regular updates to highlight progress related to your measure, including messaging for email blasts, websites, social media and newsletters
- Prepare presentation for community meetings
- Write, design and produce informational mailings and advertising to educate, inform and engage voters (priced separately; not included in fee)
- Develop strategies and plans to inform and engage key internal stakeholder groups within your district and partner organizations
- Develop strategies for managing coverage of this issue in the local press
- Develop strategies and plans to inform and engage influential external groups including elected leaders, business leaders, neighborhood leaders, faith community leaders and taxpayer groups

Step 3: Build a Strong Measure

Once we know what a viable, winnable ballot measure looks like, Props & Measures will work with you to develop a revenue measure and qualify for the ballot.

During this phase of work, Props & Measures will:

- Work with you and your financial team to finalize the tax type, tax rates and the structure of your measure
- Refine the description of your needs and/or expenditure plan to make sure they are written in clear and understandable language featuring projects and programs that are high priorities for voters
- Work with you and your legal counsel to define important taxpayer accountability protections, including any potential independent citizens' oversight committee and public reporting process, if needed
- Work with you and your legal counsel to develop all resolutions required for calling the election
- Develop the critical ballot question that will appear on ballots

- Develop and refine the full text of the measure and other materials that will appear in the ballot pamphlet mailed to all voters
- Present recommendations and documents to the Board of Directors for formal approval

References

Conejo Valley Unified School District

Jeff Baarstand

Retired Superintendent

(805) 766-7012

jeffbaarstad@gmail.com

Monterey Peninsula Regional Parks

Rafael Payan

General Manager

(831) 372-3196 Ext 101

payan@mprpd.org

Santa Clara County Open Space Authority

Andrea Mackenzie, ED

General Manager

(408) 224-7476

amackenzie@openspaceauthority.org

Fees & Costs

As is the standard in our industry, TBWBH Props & Measures contracts on a fixed-fee basis. Our standard consulting fee for this type of measure is \$6,500 per month. Reimbursable business expenses will be billed separately along with any other hard costs associated with any required production of informational materials.

Partial months of services would be billed at a prorated amount. If the results of the feasibility study do not show a viable path forward, our contract may be terminated at any time with no further obligation.

APPENDIX A
SUCCESSFUL CALIFORNIA LOCAL CITY, COUNTY, & SPECIAL DISTRICTS
FINANCE MEASURES APPROVED USING FM3'S RESEARCH
(1988 – PRESENT)

SUCCESSFUL TAX & BOND MEASURES FOR CALIFORNIA CITIES, COUNTIES, & SPECIAL DISTRICTS

Utility User Tax Measures

City of Canyon Lake (CA), Measure S	No rate change	November 2018
City of Desert Hot Springs (CA), Measure C	No rate change	November 2017
City of Alameda (CA), Measure K1	No rate change	November 2016
City of Sunnyvale (CA), Measure N	No rate change	November 2016
City of Carson (CA), Measure C	No rate change	June 2016
City of Hercules (CA), Measure C	No rate change	November 2015
City of Paramount (CA), Measure P	2.5% Increase	March 2015
City of Seal Beach (CA), Measure DD	11% to 10% Reduction	November 2014
City of Norwalk (CA), Measure B	No rate change	November 2014
City of Canyon Lake (CA), Measure DD	3.95% UUT	November 2014
City of Cloverdale, Measure O	3% UUT	November 2014
City of Palo Alto, Measure C	5% to 4.75% Reduction	November 2014
City of Hercules, Measure A	2% UUT Increase/Modernization	June 2013
City of Bellflower (CA), Measure P	2% UUT Increase	November 2012
City of South Pasadena (CA), Measure UT	8% to 7.5% Reduction	November 2011
City of Huntington Beach (CA), Measure P	.1% Reduction	November 2010
City of Indio (CA), Measure S	3% to 6% Increase UUT	November 2010
City of Santa Fe Springs (CA), Measure S	5% UUT	November 2010
City of Coachella (CA), Measure I	5% UUT	June 2010
City of Dinuba (CA), Measure M	Continue Existing 7% UUT	November 2009
City of Vallejo (CA), Measure U	No rate change	November 2009
City of Desert Hot Springs (CA), Measure A	2% Increase UUT	May 2009
City of Bellflower (CA), Measure A	No rate change	March 2009
City of Carson (CA), Measure C	2% UUT	March 2009
City of Gardena (CA), Measure A	No rate change	March 2009
City of Redondo Beach (CA), Measure RB-A	No rate change	March 2009
City of San José (CA), Measure K	5% to 4.5% Reduction	November 2008
City of Cathedral City (CA), Measure L	3% UUT	November 2008
City of San José (CA), 911 System Access Fee Change, Measure J	\$0.18/yr per Line Reduction	November 2008
City of Inglewood (CA), Measure UUT	10% to 8% Reduction	November 2008
City of Lakewood (CA), Measure L	No rate change	November 2008
Los Angeles County (CA), Measure U (Unincorporated Areas)	5% to 4.5% Reduction	November 2008
City of Sacramento (CA) Measure O	7.5% to 7% Reduction	November 2008
City of Santa Barbara (CA), Measure G	6% to 5.75% Reduction	November 2008

City of Santa Monica (CA), Measure SM	No rate change	November 2008
City of Stockton (CA), Measure U	No rate change	November 2008
City of Los Angeles (CA), Measure S	10% to 9% Reduction	February 2008
City of Pasadena (CA), Measure D	No rate change	February 2008
City of San Bernardino (CA), Measure L	7.83% to 7.75% Reduction	February 2008
City of Hermosa Beach (CA), Measure H	6% to 5.5% Reduction	November 2007
City of Grover Beach (CA), Measure O-04	No rate change	November 2004
City of Fairfield (CA), Measure H	No rate change	November 2002
City of Los Alamitos (CA), Measure Q	No rate change	November 2002
City of Lawndale (CA), Measure A	No rate change	April 2002
City of La Habra (CA), Measure II	No rate change	March 2002
City of La Palma (CA), Measure JJ	No rate change	March 2002

General-Purpose Sales Tax Measures

City of Moreno Valley (CA), Measure G	1 Cent Sales Tax	November 2021
City of Indio (CA), Measure E	1 Cent Sales Tax Extension	November 2021
City of Corona (CA), Measure X	1 Cent Sales Tax	November 2020
City of Los Alamitos (CA), Measure Y	1.5 Cent Sales Tax	November 2020
City of Oxnard (CA), Measure E	1.5 Cent Sales Tax	November 2020
City of Carson (CA), Measure K	$\frac{3}{4}$ Cent Sales Tax	November 2020
City of San Bernardino (CA), Measure S	1 Cent Sales Tax Extension & Increase	November 2020
City of Turlock (CA), Measure A	$\frac{3}{4}$ Cent Sales Tax	November 2020
City of Paso Robles (CA), Measure J	1 Cent Sales Tax	November 2020
City of Palmdale (CA), Measure AV	$\frac{3}{4}$ Cent Sales Tax	November 2020
Contra Costa County (CA), Measure X	$\frac{1}{2}$ Cent Sales Tax	November 2020
City of San Luis Obispo (CA), Measure G	1.5 Cent Sales Tax Extension & Increase	November 2020
City of Morro Bay (CA), Measure E	1 Cent Sales Tax	November 2020
City of Orinda (CA), Measure R	1 Cent Sales Tax Extension & Increase	November 2020
City of Milpitas (CA), Measure F	$\frac{1}{4}$ Cent Sales Tax	November 2020
City of Lomita (CA), Measure L	$\frac{3}{4}$ Cent Sales Tax	November 2020
City of Petaluma (CA), Measure U	1 Cent Sales Tax	November 2020
City of Healdsburg (CA), Measure T	$\frac{1}{2}$ Cent Sales Tax Extension	November 2020
City of South Lake Tahoe (CA), Measure S	1 Cent Sales Tax	November 2020
City of Bellflower (CA), Measure M	$\frac{3}{4}$ Cent Sales Tax	November 2020
City of San Jacinto (CA), Measure V	1 Cent Sales Tax	November 2020
City of Commerce (CA), Measure VS	$\frac{1}{4}$ Cent Sales Tax	November 2020
City of Montclair (CA), Measure L	1 Cent Sales Tax	November 2020
City of Imperial Beach (CA), Measure I	1 Cent Sales Tax	November 2020
City of South El Monte (CA), Measure ES	$\frac{1}{4}$ Cent Sales Tax	November 2020
City of Exeter (CA), Measure P	1 Cent Sales Tax	November 2020
City of Daly City (CA), Measure Q	$\frac{1}{2}$ Cent Sales Tax	November 2020
City of West Hollywood (CA), Measure E	$\frac{3}{4}$ Cent Sales Tax	November 2020
City of Cotati (CA), Measure S	1 Cent Sales Tax Extension	November 2020
City of Scotts Valley (CA), Measure Z	1.25 Cent Sales Tax	March 2020
City of Azusa (CA), Measure Z	$\frac{3}{4}$ Cent Sales Tax	March 2020

City of Paramount (CA), Measure Y	¾ Cent Sales Tax	March 2020
City of Whittier (CA), Measure W	¾ Cent Sales Tax	March 2020
City of San Gabriel (CA), Measure SG	¾ Cent Sales Tax	March 2020
City of Norwalk (CA), Measure P	¾ Cent Sales Tax	March 2020
City of Lakewood (CA), Measure L	¾ Cent Sales Tax	March 2020
City of Montebello (CA), Measure H	¾ Cent Sales Tax	March 2020
City of Monterey (CA), Measure G	½ Cent Sales Tax	March 2020
City of Gardena (CA), Measure G	¾ Cent Sales Tax	March 2020
City of Duarte (CA), Measure D	¾ Cent Sales Tax	March 2020
City of Culver City (CA), Measure CC	½ Cent Sales Tax Extension	March 2020
City of Reedley (CA), Measure B	¾ Cent Sales Tax	March 2020
City of Alhambra (CA) Measure AL	¾ Cent Sales Tax	March 2020
City of Long Beach (CA), Measure A	1 Cent Sales Tax Extension	March 2020
City of Arcadia (CA) Measure A	¾ Cent Sales Tax	June 2019
Santa Cruz County (CA), Measure G	½ Cent Sales Tax	November 2018
Humboldt County (CA), Measure O	½ Cent Sales Tax Extension	November 2018
Yuba County (CA), Measure K	1 Cent Sales Tax	November 2018
City of Wildomar (CA), Measure AA	1 Cent Sales Tax	November 2018
City of Santa Fe Springs (CA), Measure Y	1 Cent Sales Tax	November 2018
City of Santa Ana (CA), Measure X	1.5 Cent Sales Tax	November 2018
City of Sacramento (CA), Measure U	1 Cent Sales Tax Extension & Increase	November 2018
City of Roseville (CA), Measure B	½ Cent Sales Tax	November 2018
City of Porterville (CA), Measure I	1 Cent Sales Tax	November 2018
City of Pomona (CA), Measure PG	¾ Cent Sales Tax	November 2018
City of Pasadena (CA), Measure I	¾ Cent Sales Tax	November 2018
City of Norco (CA), Measure R	1 Cent Sales Tax	November 2018
City of Martinez (CA), Measure X	½ Cent Sales Tax	November 2018
City of Los Banos (CA), Measure H	½ Cent Sales Tax	November 2018
City of Lawndale (CA), Measure L	¾ Cent Sales Tax	November 2018
City of La Puente (CA), Measure LP	½ Cent Sales Tax	November 2018
City of Glendale (CA), Measure S	¾ Cent Sales Tax	November 2018
City of Garden Grove (CA), Measure O	1 Cent Sales Tax	November 2018
City of Culver City (CA), Measure C	¼ Cent Sales Tax	November 2018
City of Covina (CA), Measure CC	¾ Cent Sales Tax	November 2018
City of Carpinteria (CA), Measure X	1.25 Cent Sales Tax	November 2018
City of Burbank (CA), Measure P	¾ Cent Sales Tax	November 2018
City of Bakersfield (CA), Measure N	1 Cent Sales Tax	November 2018
City of Antioch (CA), Measure W	1 Cent Sales Tax Extension	November 2018
City of Alameda (CA), Measure F	½ Cent Sales Tax	November 2018
City of El Monte (CA), Measure EM	½ Cent Sales Tax Extension	November 2017
City of Hawthorne (CA), Measure HH	¾ Cent Sales Tax	November 2017
City of Larkspur (CA), Measure B	¾ Cent Sales Tax Extension & Increase	November 2017
City of Santa Barbara (CA), Measure C	1 Cent Sales Tax	November 2017
City of Palm Springs (CA), Measure D	½ Cent Sales Tax	November 2017

City of Seaside (CA), Measure L, Seaside Vital City Services Measure	½ Cent Sales Tax	June 2017
City of Delano (CA), Measure U	1 Cent Sales Tax Extension	November 2016
City of Santa Paula (CA), Measure T	1 Cent Sales Tax	November 2016
City of Ventura (CA), Measure O, Clean Water/Beaches/Street Repairs/Safety	½ Cent Sales Tax	November 2016
City of Visalia (CA), Measure N	½ Cent Sales Tax	November 2016
City of Vallejo (CA), Measure V, Sales Tax Measure	1 Cent Sales Tax Extension	November 2016
City of Santa Rosa (CA), Measure N, City Services Measure	¼ Cent Sales Tax Extension	November 2016
City of East Palo Alto (CA), Measure P	½ Cent Sales Tax	November 2016
City of Hollister (CA) Measure W, Public Safety/Essential Services	1 Cent Sales Tax Extension	November 2016
City of Temecula (CA), Measure S, 911 Emergency Response & Vital Services	1 Cent Sales Tax	November 2016
City of La Quinta (CA), Measure G	1 Cent Sales Tax	November 2016
City of Menifee (CA), Measure DD, Public Safety/Traffic Congestion/Vital Services	1 Cent Sales Tax	November 2016
City of Indio (CA), Measure X, Neighborhood Safety/Essential City Services	1 Cent Sales Tax	November 2016
City of Hemet (CA), Measure U, Public Safety & City Services Measure	1 Cent Sales Tax	November 2016
City of Riverside (CA), Measure Z, Public Safety/Vital City Services	1 Cent Sales Tax	November 2016
City of Fountain Valley (CA), Measure HH, 911/Police/Fire/Essential Services	1 Cent Sales Tax	November 2016
City of Westminster (CA), Measure SS, Police/911/Essential City Services	1 Cent Sales Tax	November 2016
City of St. Helena (CA), Measure D	½ Cent Sales Tax	November 2016
City of Wasco (CA), Measure X	1 Cent Sales Tax	November 2016
City of Lynwood (CA), Measure PS, Public Safety & Vital City Services Protection	1 Cent Sales Tax	November 2016
City of Downey (CA), Measure S, Transactions & Use Tax	½ Cent Sales Tax	November 2016
City of Lakeport (CA), Measure Z, Public Safety/Essential City Services Measure	1 Cent Sales Tax	November 2016
City of Compton (CA), Measure P	1 Cent Sales Tax	June 2016
City of San José (CA), Measure B	¼ Cent Sales Tax	June 2016
City of Long Beach (CA), Measure A	1 Cent Sales Tax	June 2016
City of Pittsburg (CA), Measure M	½ Cent Sales Tax Extension	June 2016
City of Hercules (CA), Measure B	½ Cent Sales Tax Extension	November 2015
City of Sausalito (CA), Measure O	½ Cent Sales Tax	November 2014
City of Benicia (CA), Measure C	1 Cent Sales Tax	November 2014
City of San Luis Obispo (CA), Measure G-14	½ Cent Sales Tax Extension	November 2014
Humboldt County (CA), Public Safety/Essential Services Measure, Measure Z	½ Cent Sales Tax	November 2014
City of Stanton (CA), Measure GG	1 Cent Sales Tax	November 2014
City of National City (CA), Proposition D	1 Cent Sales Tax Extension	November 2014
City of Cotati (CA), Transactions & Use Tax, Measure G	1 Cent Sales Tax Extension & Increase	June 2014
City of Cathedral City (CA), Measure B	1 Cent Sales Tax Extension	June 2014
City of Larkspur (CA), Street Repair Sales Tax, Measure C	½ Cent Sales Tax	November 2013
City of Rohnert Park (CA), Measure A	½ Cent Sales Tax Extension	November 2013
City of Stockton (CA), Measure A	¾ Cent Sales Tax	November 2013
Town of San Anselmo (CA), Sales Tax Measure D	½ Cent Sales Tax	November 2013
City of Orinda (CA), Transactions and Use Tax, Measure L	½ Cent Sales Tax	November 2012
City of Capitola (CA), Sales Tax Increase, Measure O	¼ Cent Sales Tax	November 2012
City of Commerce (CA), Sales Tax Increase, Measure AA	½ Cent Sales Tax	November 2012
City of Culver City (CA), Temporary Sales Tax, Measure Y	½ Cent Sales Tax	November 2012
City of Healdsburg (CA), Measure V	½ Cent Sales Tax	November 2012

City of Lathrop (CA), Sales Tax Increase, Measure C	1 Cent Sales Tax	November 2012
City of Hercules (CA), Temporary Emergency Funding Measure, Measure O	½ Cent Sales Tax	June 2012
City of Vallejo (CA), Measure B	1 Cent Sales Tax	November 2011
City of Santa Monica (CA), Proposition Y	½ Cent Sales Tax	November 2010
City of Santa Rosa (CA), Measure P	¼ Cent Sales Tax	November 2010
City of South El Monte (CA), Measure R	½ Cent Sales Tax	November 2010
City of Cathedral City (CA), Measure H	1 Cent Sales Tax	June 2010
City of Rohnert Park (CA), Public Safety Sales Tax, Measure E	½ Cent Sales Tax	June 2010
City of Cotati (CA), Sales Tax Increase, Measure A	½ Cent Sales Tax	April 2010
City of Arvin (CA), City Sales Tax, Measure L	1 Cent Sales Tax	November 2008
City of Capitola (CA), City Sales Extension, Measure D	¼ Cent Sales Tax Extension	November 2008
City of La Habra (CA), Measure T	½ Cent Sales Tax	November 2008
City of La Mesa (CA), Proposition L	¾ Cent Sales Tax	November 2008
City of Oxnard (CA), Measure O	½ Cent Sales Tax	November 2008
City of South Gate (CA), Measure P	1 Cent Sales Tax	June 2008
City of Pacific Grove (CA), Measure U	1 Cent Sales Tax	June 2008
City of Seaside (CA), Measure R, Vital City Services Measure	1 Cent Sales Tax	February 2008
City of Hollister (CA), Measure T	1 Cent Sales Tax	November 2007
City of Delano (CA), Measure I	1 Cent Sales Tax	November 2007
City of Vista (CA), 911 Emergency & Public Safety Sales Tax, Proposition L	½ Cent Sales Tax	November 2006
City of Inglewood (CA), Measure IT	½ Cent Sales Tax	November 2006
City of Grover Beach (CA), Measure X-06	½ Cent Sales Tax	November 2006
City of Morro Bay (CA), Measure Q-06	½ Cent Sales Tax	November 2006
City of San Luis Obispo (CA), Measure Y-06	½ Cent Sales Tax	November 2006
City of Merced (CA), Measure C	½ Cent Sales Tax	November 2005
City of Salinas (CA), Measure V	½ Cent Sales Tax	November 2005
City of Tulare (CA), Measure I	½ Cent Sales Tax	November 2005
City of West Sacramento (CA), Measure K	½ Cent Sales Tax	November 2002

Dedicated Sales Tax Measures

Peninsula Corridor Joint Powers Authority [Caltrain] (CA), Measure RR	1/8 Cent Sales Tax	November 2020
Sonoma County (CA), Measure M, Parks & Conservation Sales Tax	1/8 Cent Sales Tax	November 2018
City of Chowchilla (CA), Measure N, Chowchilla Public Safety Sales Tax	1 Cent Sales Tax	November 2018
City of Monterey (CA), Measure S, Street & Infrastructure Sales Tax	1 Cent Sales Tax Extension	November 2018
Santa Cruz County (CA), Transportation Sales Tax, Measure D	½ Cent Sales Tax	November 2016
Santa Clara County (CA), Transportation Sales Tax, Measure B	½ Cent Sales Tax	November 2016
Los Angeles County (CA), Traffic Improvement Plan, Measure M	1 Cent Sales Tax Ext & Increase	November 2016
City of Clearlake (CA), Measure V, Transactions & Use Tax for Road Maintenance	1 Cent Sales Tax	November 2016
City of Sanger (CA), Measure S, Public Safety Sales Tax Extension	¾ Cent Sales Tax Extension	November 2016
City of Monterey (CA), Measure P, Special Transactions & Use Tax	1 Cent Sales Tax	November 2014
Fresno County (CA), Measure Z, Keep our Zoo	1/10 Cent Sales Tax Extension	November 2014
City of Los Banos (CA), Public Safety Sales Tax Renewal, Measure K	½ Cent Sales Tax Extension	November 2013
Fresno County (CA), Measure B, Libraries Protection Measure	1/8 Cent Sales Tax Extension	November 2012
Napa County (CA) Measure T, Sales Tax for Road Repairs	½ Cent Sales Tax Extension	November 2012
City of Los Banos (CA), Public Safety Sales Tax Renewal, Measure A	½ Cent Sales Tax Extension	November 2009

Imperial County (CA), Safe Roads, Air Quality, Pothole Repair, Measure D	½ Cent Sales Tax Extension	November 2008
City of Galt (CA), Anti-Gang Sales Tax, Measure R	½ Cent Sales Tax	November 2008
Los Angeles County (CA), Transportation Sales Tax, Measure R	½ Cent Sales Tax	November 2008
Santa Barbara County (CA), Transportation Sales Tax, Measure A	½ Cent Sales Tax Extension	November 2008
City of Reedley (CA), Public Safety Sales Tax, Measure G	½ Cent Sales Tax	February 2008
City of Sanger (CA), Public Safety Sales Tax, Measure S	¾ Cent Sales Tax	February 2008
City of Ceres (CA), Public Safety Sales Tax, Measure H	½ Cent Sales Tax	November 2007
City of Selma (CA), Public Safety Sales Tax, Measure S	½ Cent Sales Tax	November 2007
Fresno County (CA), Transportation Safety, Road Repair, Measure C	½ Cent Sales Tax Extension	November 2006
Tulare County (CA), Transportation-Air Quality, Measure R	½ Cent Sales Tax	November 2006
Sonoma County (CA), Open Space, Clean Water Protection, Measure F	¼ Cent Sales Tax Extension	November 2006
Orange County (CA), Transportation Investment Plan, Measure M	½ Cent Sales Tax Extension	November 2006
City of Manteca (CA), 911 Emergency & Public Safety Sales Tax, Measure M	½ Cent Sales Tax	November 2006
City of Dinuba (CA), 911 Emergency & Public Safety Sales Tax, Measure F	½ Cent Sales Tax	November 2005
City of Porterville (CA), 911 Emergency & Public Safety Sales Tax, Measure H	½ Cent Sales Tax	November 2005
Fresno County (CA), Zoo Sales Tax, Measure Z	1/10 Cent Sales Tax	November 2004
San Mateo County (CA), Transportation Sales Tax, Measure A	½ Cent Sales Tax Extension	November 2004
San Diego County (CA), Transportation Sales Tax, Proposition A	½ Cent Sales Tax Extension	November 2004
City of Los Banos (CA), Public Safety Sales Tax, Measure P	½ Cent Sales Tax	November 2004
City of Stockton (CA), Public Safety Sales Tax, Measure W	¼ Cent Sales Tax	November 2004
City of Visalia (CA), Public Safety Sales Tax, Measure T	¼ Cent Sales Tax	March 2004
Santa Clara County (CA), Transit Sales Tax, Measure A	½ Cent Sales Tax	November 2000
Los Angeles County (CA) Transportation Sales Tax, Proposition C	½ Cent Sales Tax	November 1990
Santa Cruz County (CA), Earthquake Recovery, Measure E	½ Cent Sales Tax	November 1990
San Bernardino County (CA) Transportation Sales Tax, Measure I	½ Cent Sales Tax	November 1989
Riverside County (CA) Transportation Sales Tax, Measure A	½ Cent Sales Tax	November 1988
Sacramento County (CA) Transportation Sales Tax, Measure A	½ Cent Sales Tax	November 1988

Parcel Tax Measures

San Geronio Memorial Healthcare District (CA), Measure H	Renew existing \$60.52 per parcel	December 2021
Santa Clara Valley Water District (CA), Measure S	Renew existing 0.6 cents per square foot	November 2020
City of Arcata (CA), Natural Open Space Preservation Parcel Tax, Measure A	\$37 per parcel	November 2020
Los Angeles County Flood Control District (CA), Measure W	2.5 cents per square foot	November 2018
Southern Marin Fire Protection District (CA), Measure I	\$200 per parcel	November 2018
City of Orinda (CA), Measure J, Library Parcel Tax	\$39 to \$69 Parcel Tax Increase	June 2018
City of Desert Hot Springs (CA), Measure B	Renew existing \$103-\$267.60 per parcel	November 2017
Mountain Communities Healthcare District/Trinity Hospitals (CA), 24 Hr. Emergency Room Parcel Tax, Measure G	Renew existing \$30-\$114 per parcel	November 2016
Apple Valley Fire Protection District (CA), Measure A	\$126.90 per parcel	November 2016
Monterey Peninsula Regional Park District (CA), Measure E	\$25.26 per parcel	November 2016
City of Culver City (CA), Safe/Clean Water Protection Measure, Measure CW	\$99 per parcel	November 2016
Los Angeles County (CA), Safe, Clean Neighborhood Parks, Open Space, Beaches, Rivers Protection, and Water Conservation, Measure A	1.5 cents per square foot	November 2016
Rodeo-Hercules Fire Protection District (CA), Measure O	\$216 per parcel	November 2016
San Francisco Bay Restoration Authority (CA), Clean & Healthy Bay, Measure AA	\$12 per parcel	June 2016

Marin County (CA), Marin Emergency Radio Authority, Measure A	\$29 per parcel	November 2014
City of San José (CA), Measure B, Library Parcel Tax	Renew existing \$29 per parcel	June 2014
Santa Clara Valley Water District (CA), Clean Safe Creeks Parcel Tax, Measure B	Renew existing 0.6 cents per square foot	November 2012
City of Wildomar (CA), Special Parcel Tax, Measure Z	\$28 per parcel	November 2012
City of Riverside (CA), Measure I, Library Parcel Tax	\$19 per parcel	November 2011
Mountain Communities Healthcare District/Trinity Hospitals (CA), 24 Hr. Emergency Room Parcel Tax, Measure T	Renew existing \$32-\$118 per parcel	June 2011
Marin County Service Area 28 (CA), Paramedic Services Special Tax, Measure M	\$64 per parcel	November 2010
City of Desert Hot Springs (CA) 911 Emergency Response Police, Fire & Safe Streets Measure, Measure G	Renew existing \$39-\$121 per parcel	June 2010
City of Santa Cruz (CA), Clean Beach Tax, Measure E	\$28-\$94 per parcel	November 2008
City of Orinda (CA), Measure E, Library Parcel Tax	\$27 to \$39 Parcel Tax Increase	June 2008
City of Monrovia (CA), Measure L, Library Parcel Tax	\$62 per parcel	February 2008
Mountain Communities Healthcare District/Trinity Hospitals (CA), 24 Hr. Emergency Room Parcel Tax, Measure P	\$32-\$118 per parcel	November 2006
City of Santa Monica (CA), Measure V, Clean Beaches and Ocean Parcel Tax	\$84 per parcel	November 2006
City of San José (CA), Measure S, Library Parcel Tax	\$25 per parcel	November 2004
Palm Drive Health Care District (CA), Hospital Parcel Tax, Measure W	\$155 per parcel	November 2004
East Bay Regional Park District (CA), Park District Parcel Tax Measure CC	\$12 per parcel	November 2004
City of Oakland (CA), Library Parcel Tax Measure Q	\$75 per parcel	November 2004
Los Angeles County (CA), Preservation of Trauma Centers & Emergency Medical Services; Bioterrorism Response, Measure B	3 cents per square foot	November 2002
Consolidated Fire Protection District of Los Angeles County (CA), Proposition E	\$40 per parcel	June 1997

Bond Measures

City of San Francisco (CA), Health and Recovery Bonds, Proposition A	\$487.5 Million Bond	November 2020
City of Piedmont (CA), Community Pool Bond, Measure UU	\$19.5 Million Bond	November 2020
City of San Francisco (CA), Earthquake Safety And & Emergency Response Bond, Proposition B	\$628.5 Million Bond	March 2020
Fair Oaks Recreation & Park District (CA), Bond Measure J	\$26.9 Million Bond	November 2018
City of San José (CA) Public Safety & Infrastructure Bond, Measure T	\$650 Million Bond	November 2018
City of San Francisco (CA), Embarcadero Seawall Improvement Bond, Prop. A	\$425 Million Bond	November 2018
Bay Area Rapid Transit District (CA), Measure RR	\$3500 Million Bond	November 2016
City of Orinda (CA), Road and Storm Drain Repair Bond, Measure L	\$25 Million Bond	June 2016
City of San Francisco (CA), Public Health and Safety Bond, Proposition A	\$350 Million	June 2016
City of San Francisco (CA), Transportation and Road Improvement Bond, Proposition A	\$500 Million	November 2014
City of Grover Beach (CA), Measure K-14, Local Street Improvements	\$48 Million	November 2014
City of San Francisco (CA), Earthquake Safety and Emergency Response Bond, Proposition A	\$400 Million Bond	June 2014
City of Orinda (CA), Road and Storm Drain Repair Bond, Measure J	\$20 Million Bond	June 2014
City of San Francisco (CA), Parks Bond, Proposition B	\$195 Million Bond	November 2012
City of San Francisco (CA), Road Repaving And Street Safety Bond, Proposition B	\$248 Million Bond	November 2011

City of San Francisco (CA), Earthquake Safety And & Emergency Response Bond, Proposition B	\$412.3 Million Bond	June 2010
City of San Francisco (CA), General Hospital & Trauma Center Earthquake Safety Bond, Proposition A	\$887.4 Million Bond	November 2008
Santa Clara County (CA), Hospital Seismic Safety & Medical Facility Bond, Measure A	\$840 Million Bond	November 2008
City of Palo Alto (CA), Measure N, Library Facilities Bond	\$76 Million Bond	November 2008
Twin Cities (CA), Measure E, Public Safety/ 911 Response Bond,	\$20 Million Bond	November 2008
City of Gilroy (CA), Measure F, New Library Building Bond	\$37 Million Bond	November 2008
City of San Juan Capistrano (CA), Open Space, Natural Areas & Clean Water Protection & Preservation, Measure Y	\$30 Million Bond	November 2008
City of Martinez (CA), Safety Improvement Bond, Measure H	\$30 Million Bond	November 2008
Sierra Kings Health Care District (CA), Continuing Repair, Improvement and Emergency Care, Measure E	\$20 Million Bond	November 2006
Palomar Pomerado Health Care District (CA), Hospital Bond, Measure BB	\$496 Million Bond	November 2004
City of Los Angeles (CA), Storm Drain/Water Clean-up, Measure O	\$500 Million Bond	November 2004
City of Escondido (CA), Public Safety Bond, Proposition P	\$84.35 Million Bond	November 2004
City of La Mesa (CA), Public Safety Bond, Measure D	\$25 Million Bond	March 2004
City of Los Angeles (CA), Public Safety Bond, Measure Q	\$600 Million Bond	March 2002
City of San José (CA), Public Safety Bond, Measure O	\$159 Million Bond	March 2002
City of San José (CA), Library Bond, Measure O	\$211.79 Million Bond	November 2000
City of San José (CA), Safe Neighborhood Parks & Recreation, Measure P	\$228 Million Bond	November 2000
City of Saratoga (CA), Library Bond, Measure N	\$15 Million Bond	November 2000
City of Los Angeles (CA), Fire Protection & Animal Control Bond, Proposition F	\$532.6 Million Bond	November 2000
City of Los Angeles (CA), Zoo Bond, Proposition CC	\$47.6 Million Bond	November 1998
City of Los Angeles (CA), Library Bond, Measure DD	\$178 Million Bond	November 1998
City of Los Angeles (CA), Exposition Park Bond, Proposition EE	\$35 Million Bond	November 1998
City of Berkeley (CA), Seismic Safety Bond, Measure S	\$49 Million Bond	November 1996
City of Los Angeles (CA) 911 Dispatch System Bond, Proposition M	\$235 Million Bond	November 1992

Transient Occupancy Tax Measures

City of Inglewood (CA), Measure H	14% to 15.5% Increase	November 2021
Tuolumne County (CA), Measure U	10% to 12% Increase	November 2020
City of Half Moon Bay (CA), Measure U	12% to 15% Increase	November 2020
City of Pismo Beach (CA), Measure B	10% to 11% Increase	November 2020
City of Long Beach (CA), Measure B	6% to 7% Increase	March 2020
City of Diamond Bar (CA), Measure Q	10% to 14% Increase	November 2018
City of Daly City (CA), Measure VV	10% to 13% Increase	November 2018
City of Sunnyvale (CA), Measure K	10.5% to 12.5% Increase	November 2018
City of Palo Alto (CA), Measure E	14% to 15.5% Increase	November 2018
City of Milpitas (CA), Measure R	10% to 14% Increase	November 2018
Mariposa County (CA), Measure M	10% to 12% Increase	November 2018
Calaveras County (CA), Measure G	6% to 12% Increase	November 2018
Sonoma County (CA), Measure L	9% to 12% Increase	November 2016
City of Moreno Valley (CA), Measure L	8% to 13% Increase	November 2016

City of Palm Desert (CA), Measure T	9% to 11% Increase	November 2016
City of Laguna Beach (CA), Measure LL	10% to 12% Increase	November 2016
City of Glendale (CA), Measure O	10% to 12% Increase	April 2015
City of Palo Alto (CA), Measure B	12% to 14% Increase	November 2014
City of Indio (CA), Vital City Services Measure, Measure O	10% to 13% Increase	November 2014
City of Carpinteria (CA), Transient Occupancy Tax, Measure E	10% to 12% Increase	November 2012
North Lake Tahoe (CA), Transient Occupancy Tax, Measure F	Reauthorize 10%	June 2012
Los Angeles County (CA), Hotel Occupancy Tax, Measure H	Reauthorize 12%	June 2012
City of Riverside (CA), Transient Occupancy Tax, Measure V	11% to 13% Increase	November 2010
City of Kingsburg (CA), Transient Occupancy Tax, Measure A	8% to 12% Increase	November 2008
City of Sunnyvale (CA), Transient Occupancy Tax, Measure E	8.5% to 9.5% Increase	November 2005
City of West Sacramento (CA), Measure T	8% to 12% Increase	November 2004
City of Santa Barbara (CA), Measure B	10% to 12% Increase	November 2000

Cannabis Tax Measures

City of La Habra (CA), Measure W	Cannabis Business Tax	November 2020
City of Costa Mesa (CA), Measure Q	Cannabis Business Tax	November 2020
City of El Monte (CA), Measure PC	Cannabis Business Tax	March 2020
City of West Hollywood (CA), Measure Y	Cannabis Business Tax	March 2019
City of Hemet (CA), Measure Z	Cannabis Business Tax	November 2018
City of Pomona (CA), Measure PC	Cannabis Business Tax	November 2018
City of Santa Paula (CA), Measure N	Cannabis Business Tax	November 2018
City of Santa Ana (CA), Measure Y	Cannabis Business Tax	November 2018
City of San Luis Obispo (CA), Measure F	Cannabis Business Tax	November 2018
City of Mountain View (CA), Measure Q	Cannabis Business Tax	November 2018
City of Moreno Valley (CA), Measure M	Cannabis Business Tax	November 2018
City of Daly City (CA), Measure UU	Cannabis Business Tax	November 2018
City of Merced (CA), Measure Y	Cannabis Business Tax	June 2018
City of Culver City (CA), Measure A	Cannabis Business Tax	April 2018
City of Palm Springs (CA), Measure E	Cannabis Business Tax	November 2017
City of Seaside (CA), Measure L	Cannabis Business Tax	June 2017
City of Bellflower (CA), Measure B	Cannabis Business Tax	March 2017
City of Long Beach (CA), Measure MA	Cannabis Business Tax	November 2016
City of Long Beach (CA), Measure MM	Cannabis Business Tax	November 2016
Humboldt County (CA), Measure S	Cannabis Business Tax	November 2016
Calaveras County (CA), Measure C	Cannabis Business Tax	November 2016
City of Santa Ana (CA), Measure BB	Cannabis Business Tax	November 2014
City of Sacramento (CA), Measure C	Cannabis Business Tax	November 2010
City of San José (CA), Measure U	Cannabis Business Tax	November 2010

Benefit Assessments

Sacramento Area Flood Control Agency (CA)	Property Assessment	June 2016
Vallejo Sanitation & Flood Control District (CA)	Property Assessment	May 2015
Sutter Butte Flood Control Agency (CA)	Property Assessment	June 2010
West Sacramento Area Flood Control Agency (CA)	Property Assessment	July 2007

Sacramento Area Flood Control Agency (CA)	Property Assessment	April 2007
City of San Ramon (CA) Lighting & Landscape District	Property Assessment	June 2006
Los Osos Community Service District (CA)	Property Assessment	June 2001
Sacramento Area Flood Control Agency (CA)	Property Assessment	April 2000
Los Angeles County (CA), Safe Neighborhood Parks, Proposition A	Property Assessment	November 1996
City of Los Angeles (CA) Safe Parks for Children, Proposition K	Property Assessment	November 1996
City of San José (CA), Library Assessment, Measure E	Property Assessment	November 1994

Sugar-Sweetened Beverage Tax Measures

City of Oakland (CA), Measure HH	1 cent/ounce Sugar-Sweetened Beverage Tax	November 2016
City of San Francisco (CA), Measure V	1 cent/ounce Sugar-Sweetened Beverage Tax	November 2016
City of Berkeley (CA), Measure D	1 cent/ounce Sugar-Sweetened Beverage Tax	November 2014

Utility Funds Transfer Measures

City of Riverside (CA), Measure C	Utility Funds Transfer	November 2021
City of Pasadena (CA), Measure P	Utility Funds Transfer	November 2020
City of Long Beach (CA), Measure M	Utility Funds Transfer	June 2018
City of Riverside (CA), Measure A, Local Services & Clean Water	Utility Funds Transfer	June 2013

Property Transfer Tax Measures

City of San José (CA), Measure E	Property Transfer Tax	March 2020
San Francisco County (CA), Real Property Transfer Tax, Proposition N	Property Transfer Tax	November 2010
City of Alameda (CA), Real Property Transaction Tax, Measure P	Property Transfer Tax	March 2008

Business Tax Measures

City of Richmond (CA), Measure I	Gross Receipts Tax	November 2020
City of Long Beach (CA), Measure US	\$0.15 per barrel increase oil production tax	November 2020
City of San José (CA), Measure H	Cardroom Tax Rate Increase	November 2020
City of Mountain View (CA), Measure P	Per Employee Tax	November 2018
City of Daly City (CA), Measure BB	Business License Tax	November 2018
City of Carson (CA), Measure C	Petroleum Business Tax	November 2017
City of San José (CA), Measure G	Business License Tax	November 2016
City of East Palo Alto (CA), Measure O	Landlord Business Tax	November 2016
City of Marina (CA), Measure U	Business License Tax	November 2016
City of San Francisco (CA), Gross Receipts Tax, Proposition E	Gross Receipts Tax	November 2012
City of San José (CA), Cardroom Measure, Measure K	Cardroom Tax Rate Increase	November 2010
City of Long Beach (CA), Measure H	\$0.25 per barrel increase oil production tax	May 2007
City of Sunnyvale (CA), Measure D	Business License Tax	November 2005

Other Financing Measures

Santa Clara Valley Transportation Authority (CA), Measure B	\$10 Vehicle Reg Fee Increase	November 2010
Metropolitan Transportation Commission (CA), Regional Measure 3	\$3 Bridge Toll Increase	June 2018

APPENDIX B

GRAPHIC PRESENTATION OF SURVEY RESULTS: MARCH 2018 FM3

SURVEY FOR THE FAIR OAKS RECREATION & PARK DISTRICT



Fair Oaks Recreation & Park District Voter Views of Parks Funding

*Key Findings of a Survey of FORPD Voters Conducted
March 23-April 2, 2018*

Methodology

- 876 interviews with likely November 2018 voters in the Fair Oaks Recreation & Park District
- Conducted March 23-April 2, 2018, online and via landline and cell phones
- Margin of sampling error of $\pm 4.0\%$ at the 95% confidence interval
- Due to rounding, some percentages do not add up to 100%

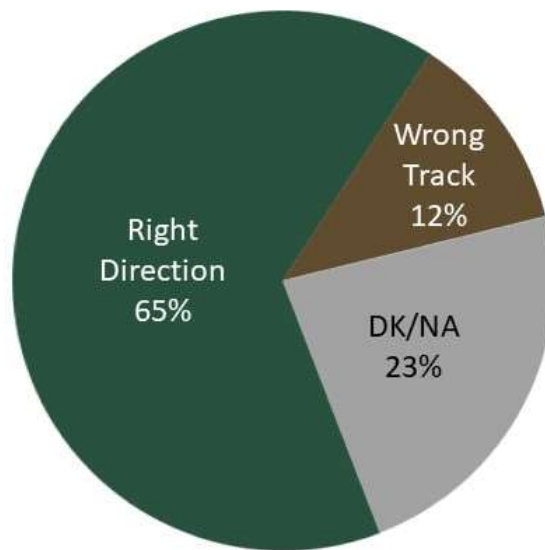




Community Context

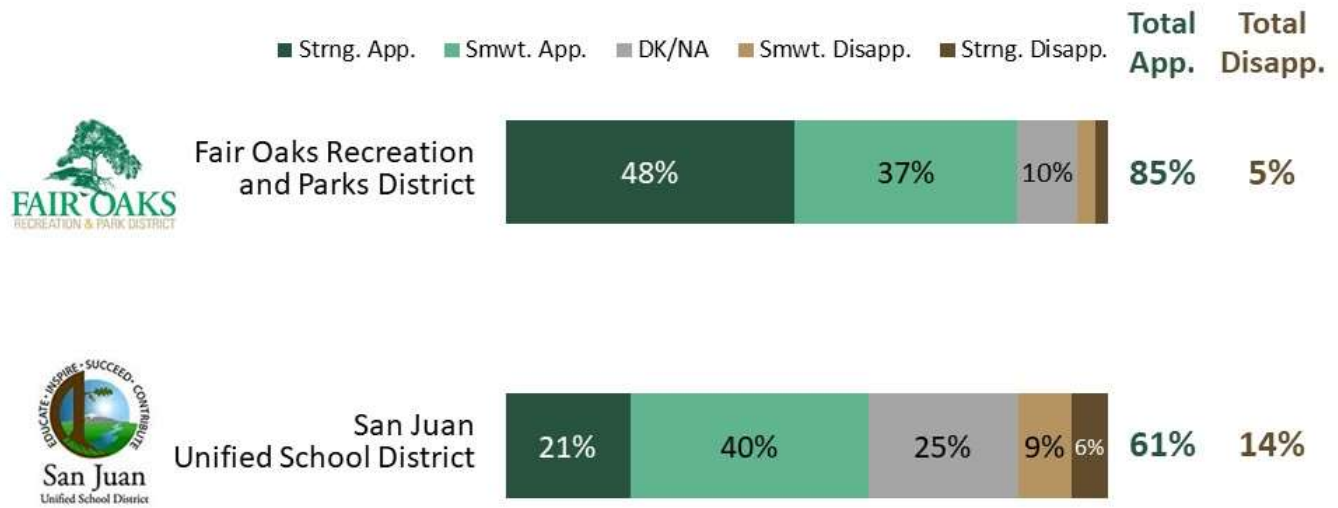
Two-thirds of voters believe the area is headed in the right direction.

Would you say things in Fair Oaks are generally headed in the right direction, or do you feel that they are pretty seriously on the wrong track?

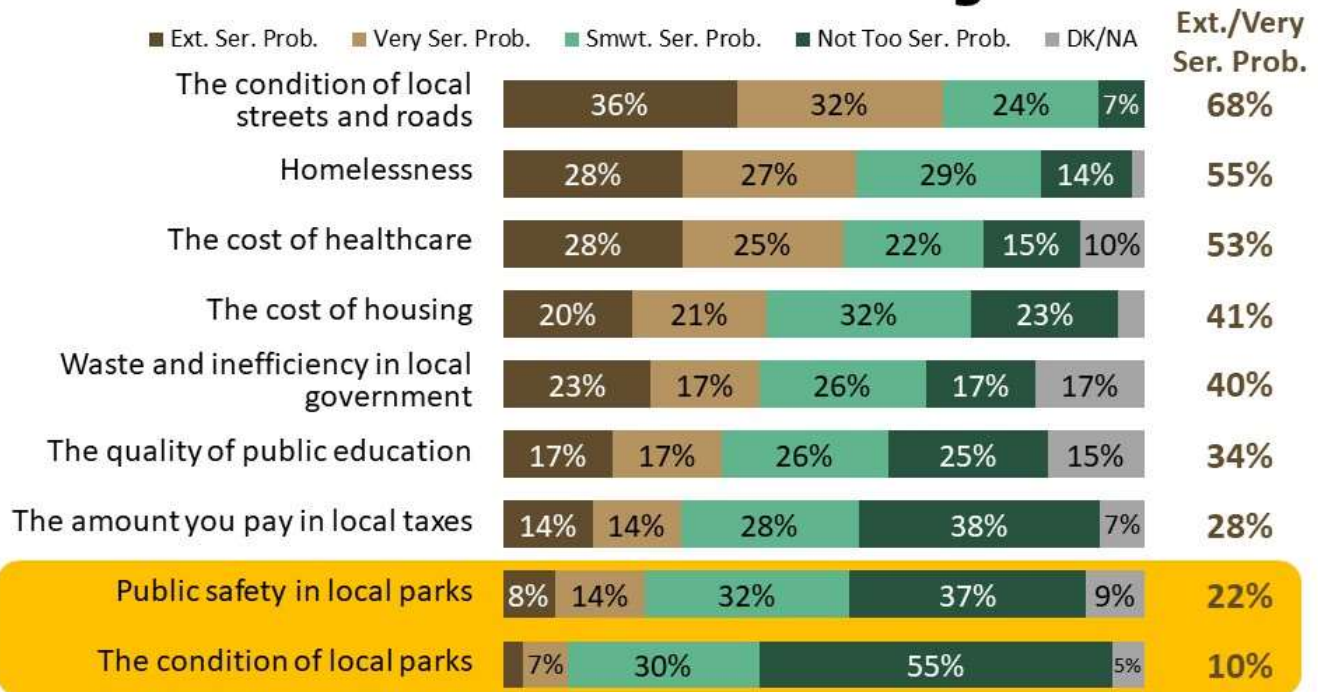


Voters have overwhelmingly positive views of the District.

I'm going to read you a short list of public institutions in the region. For each one you have heard of, please tell me whether you approve or disapprove of the job each is doing.

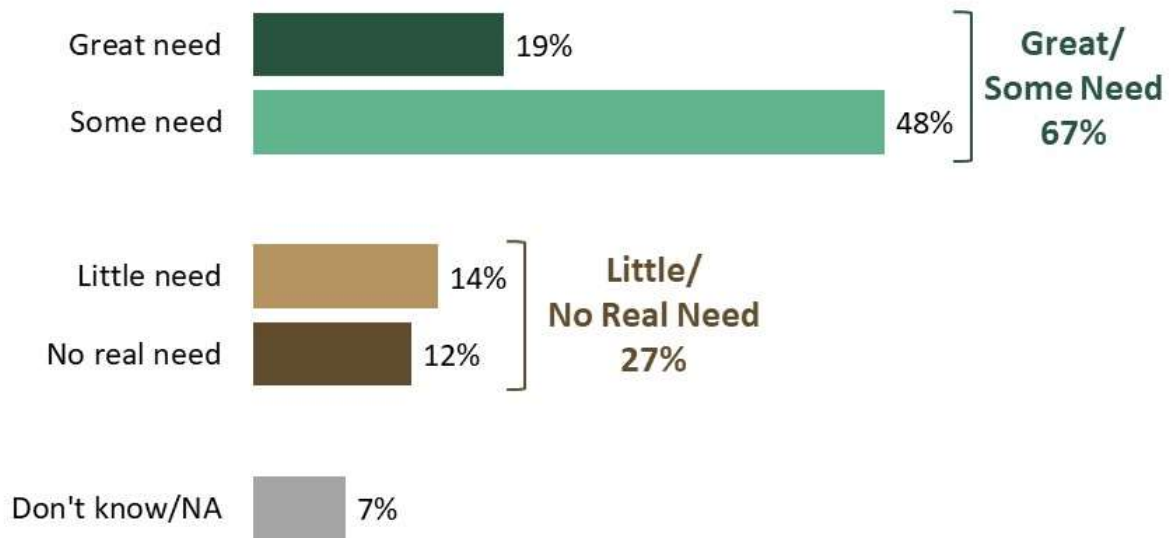


Road conditions, homelessness and health care costs are top concerns, while park conditions are much less urgent.



Two-thirds see at least “some need” for additional parks and community center funds.

Generally speaking, would you say that Fair Oaks Recreation and Park District has a great need, some need, a little need, or no real need for additional funding for neighborhood parks, open space, and community centers?



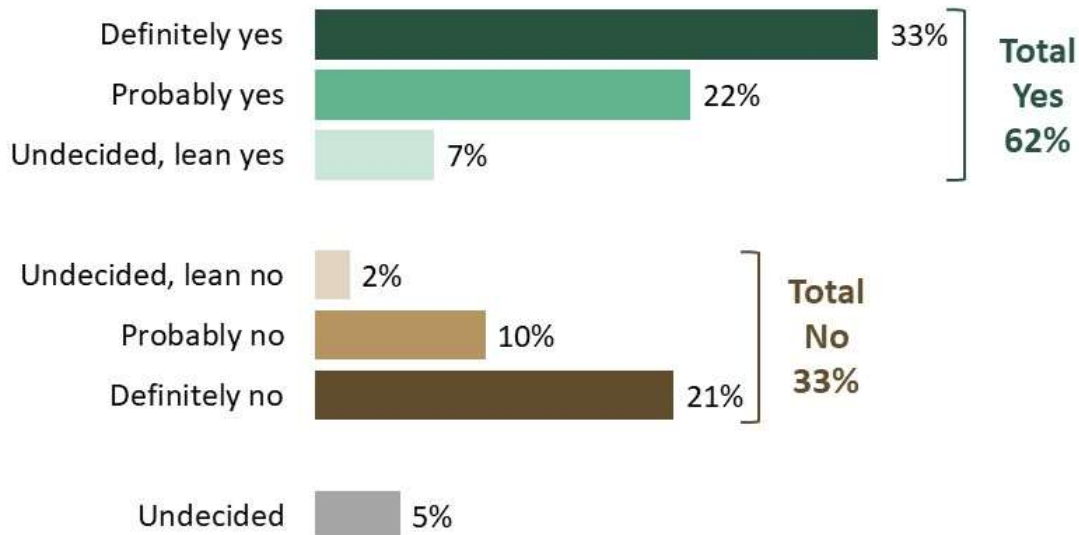


Voter Support for a Bond Measure

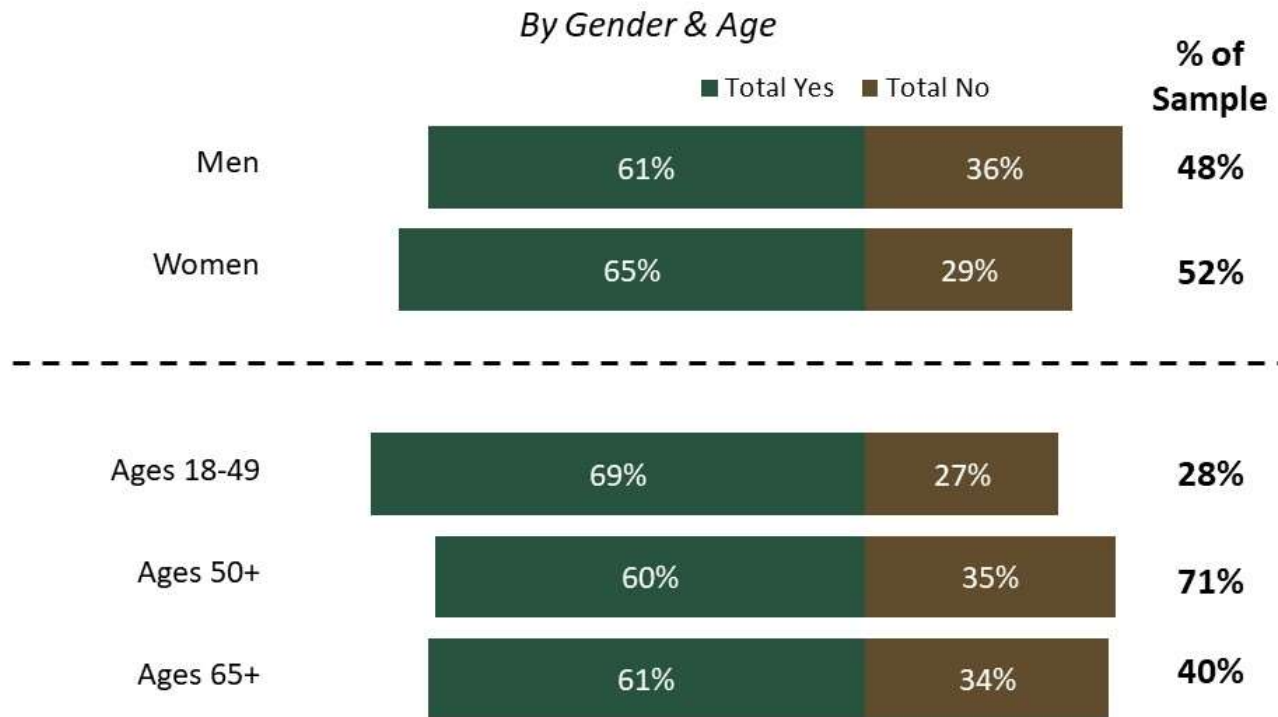


FAIR OAKS RECREATION AND PARK MEASURE. To build a community center for senior/youth/adult arts/wellness/education programs/events; repair/upgrade amphitheater/community parks/facilities/playgrounds; improve disabled access/energy/water efficiency/seismic safety/parking, shall the Fair Oaks Recreation and Park District issue \$30 million in bonds with an average levy of \$19 per \$100,000 of assessed value, generating approximately \$893,000 annually to pay back the bonds over 30 years, requiring independent oversight and published audits?

Three in five support the measure initially, falling short of the two-thirds needed for passage.

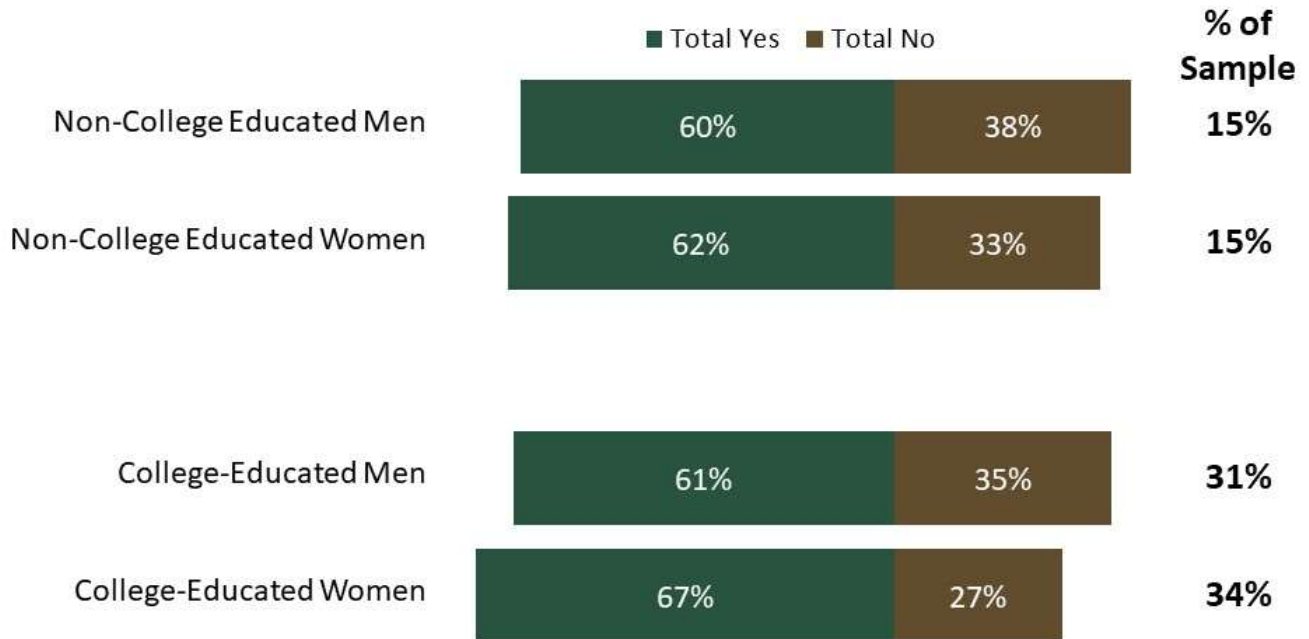


The measure has greater than two-thirds support among voters under age 50.

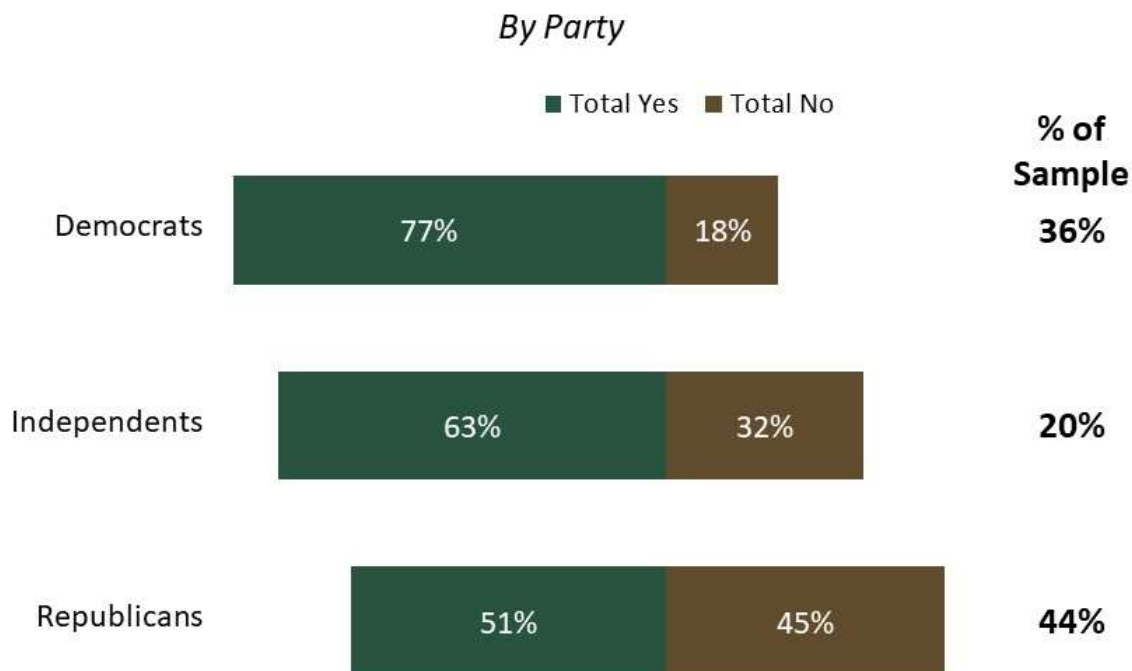


College-educated women also offer support just above the margin needed.

By Education by Gender

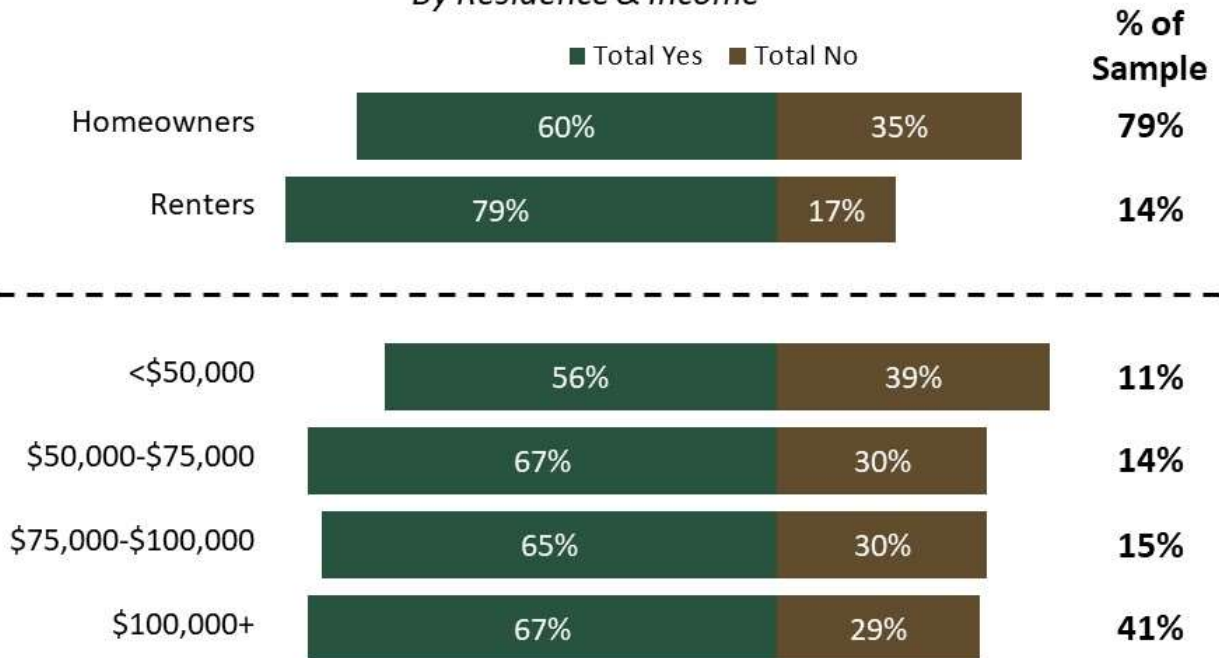


More than three-quarters of Democrats back the measure, as do three in five independents.



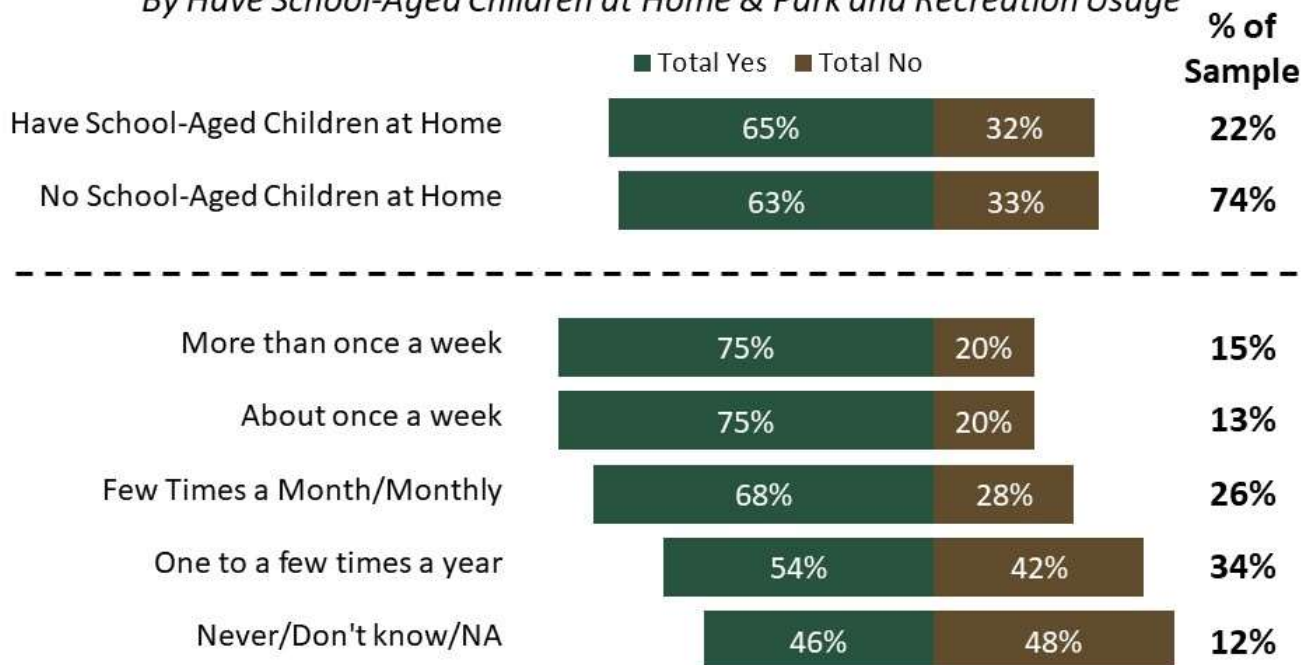
Renters are more supportive than homeowners, though they are relatively small share of the electorate.

By Residence & Income



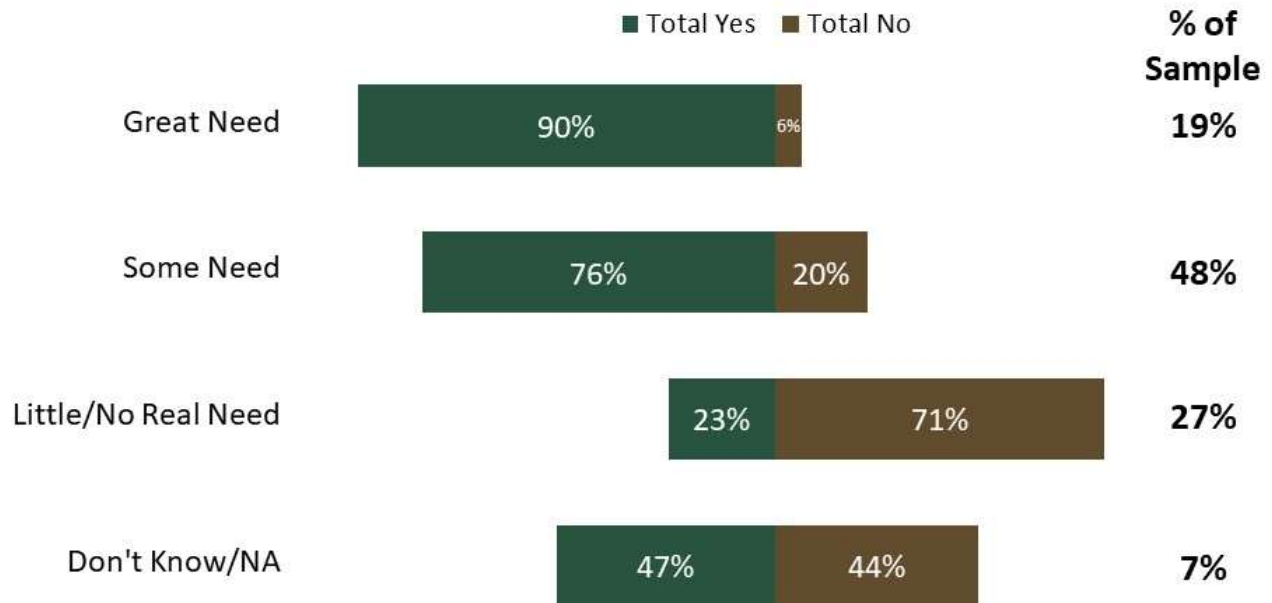
Three-quarters of frequent parks-goers support the bond measure.

By Have School-Aged Children at Home & Park and Recreation Usage



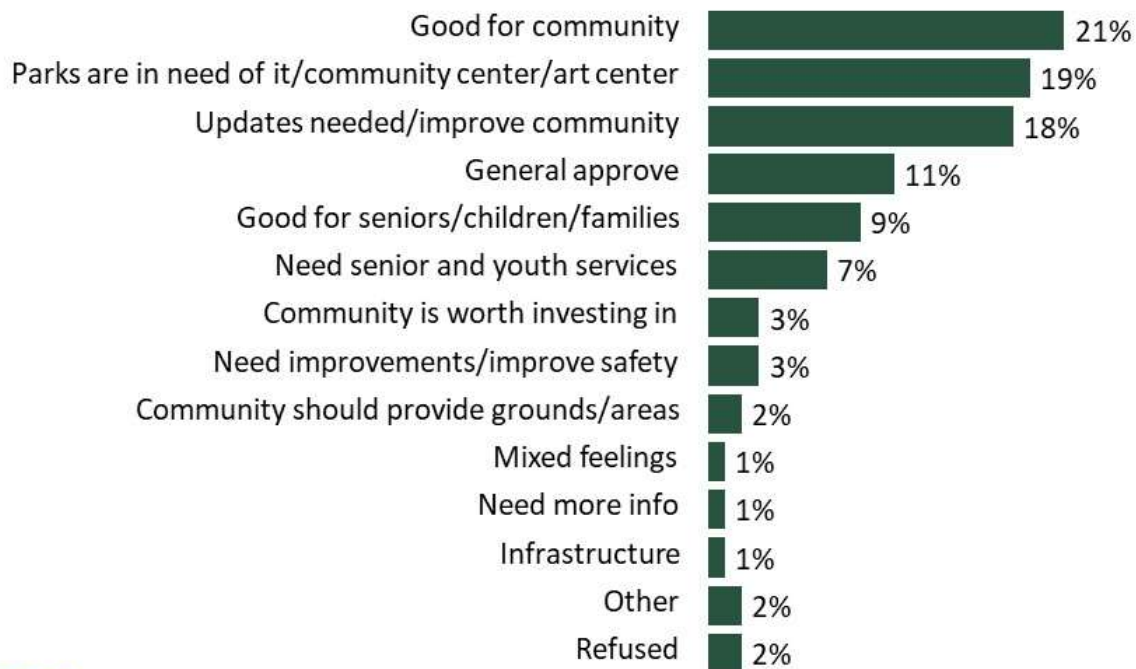
Voters who see a need for funding are much more likely to back the measure.

By Need for Funding



Supporters of the measure frequently mention its benefits for the community at large.

*In a few words of your own, why would you vote YES on this ballot measure?
(Open-ends; Grouped Responses Shown; Asked of Yes Voters Only, N=547)*



Verbatim Responses from Supporters

It's overdue. It's a project that should have been done years ago.

Because I think a senior center would be wonderful in this area

I support creating a place or facility that serves seniors adults and children in the community. Orangevale has a community center, and Folsom and Roseville do, too.

My family uses the parks and I want my kids to have positive experiences in the parks.

The recreation and park district provides a positive impact on our community and they do a wonderful job.

My brother just had a little girl, and I want her to have parks to play in.

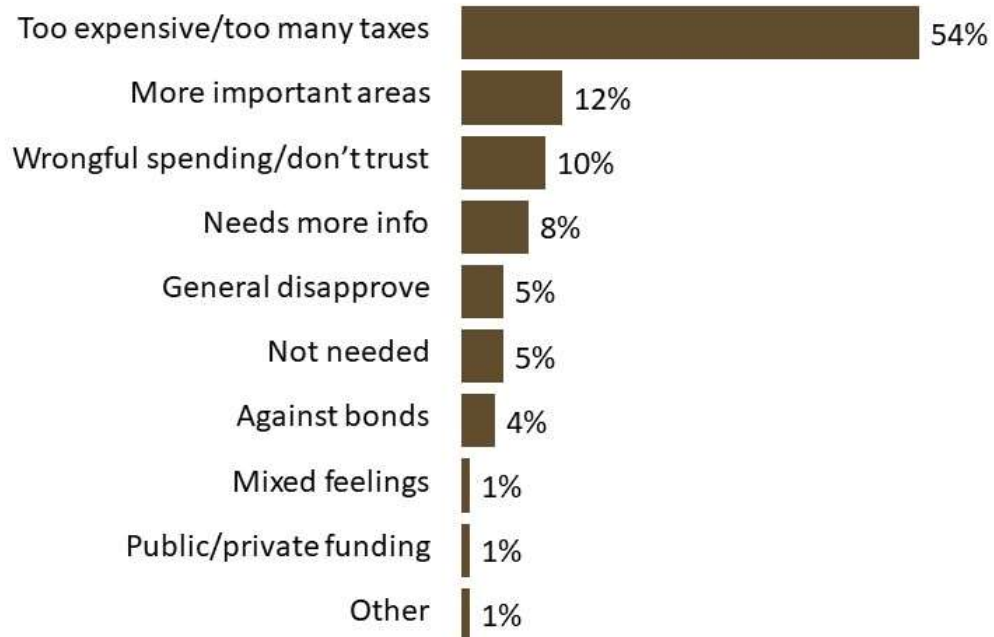
The community center seems to be getting old. It was built in the 1950s and doesn't have handicap access. There are probably restrooms that need to be upgraded.

Everything is falling apart. We need to provide more safer places for kids to play.

We use the park almost every day.

Opponents of the bond are largely anti-tax.

*In a few words of your own, why would you vote **NO** on this ballot measure?
(Open-ends; Grouped Responses Shown; Asked of No Voters Only, N=288)*



Verbatim Responses from Opponents

I don't think Fair Oaks needs something of that caliber, that expensive. ... I think that to pay back that amount of money over 30 years is kind of stupid.

In California we have too many bonds. We raised too many taxes and go into more debt. We need to put an end to it.

I think the tax money needs to fix what we already have and not make more. The roads need to be fixed before anything rather than new amphitheaters. Yes in the future but not now.

We can't drive without hitting potholes. We should fix that instead of building a new recreation center.

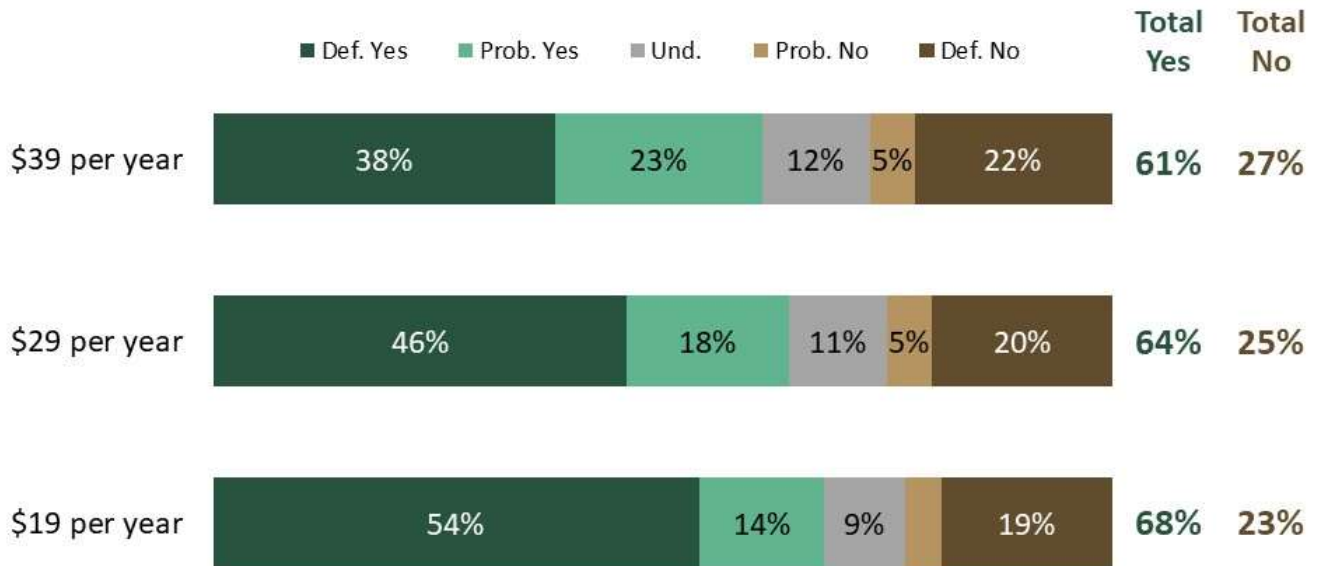
We don't need to go in debt for the parks. We have parks already, we have plenty of places for recreation.

We don't need money to be spending on stupid stuff like that when it can go to roads.

California taxes are so high already. They just keep going up and up and it's just getting out of hand.

Just over two-thirds of voters support a measure that would cost them \$19 annually.

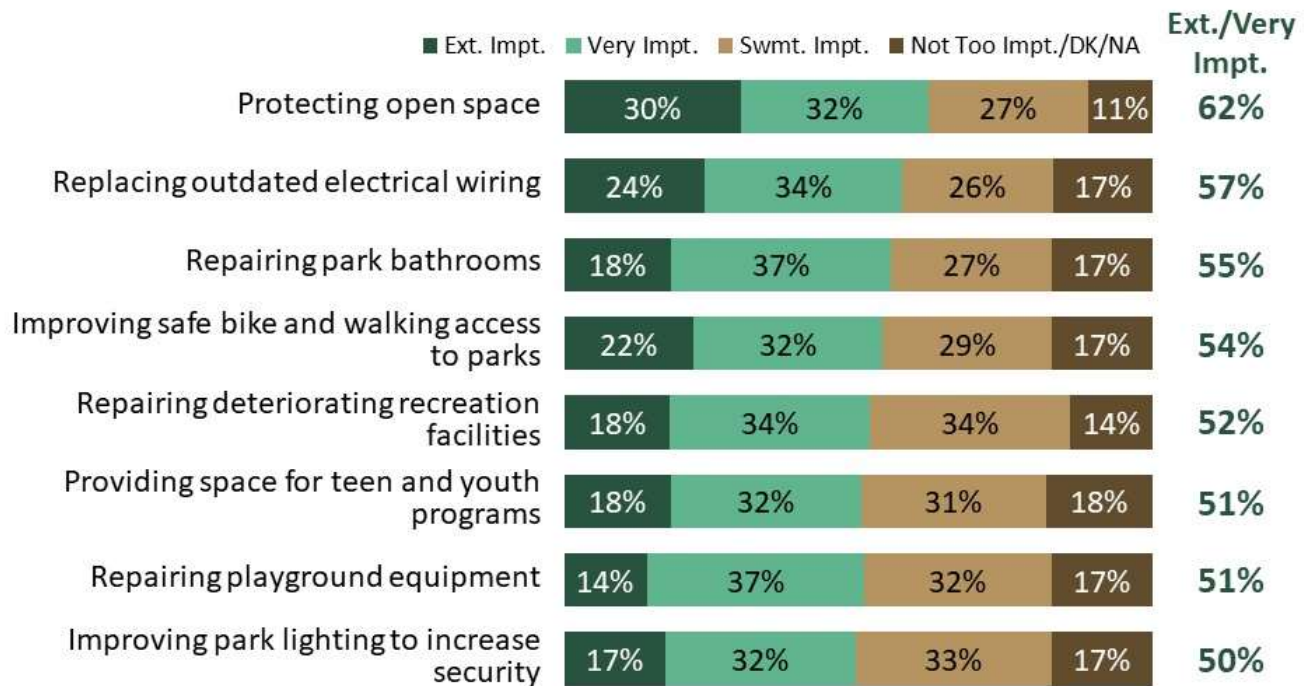
The final amount of the bond measure has not yet been determined. If the measure cost you _____, do you think you would vote yes in favor of the measure or vote no to oppose it?



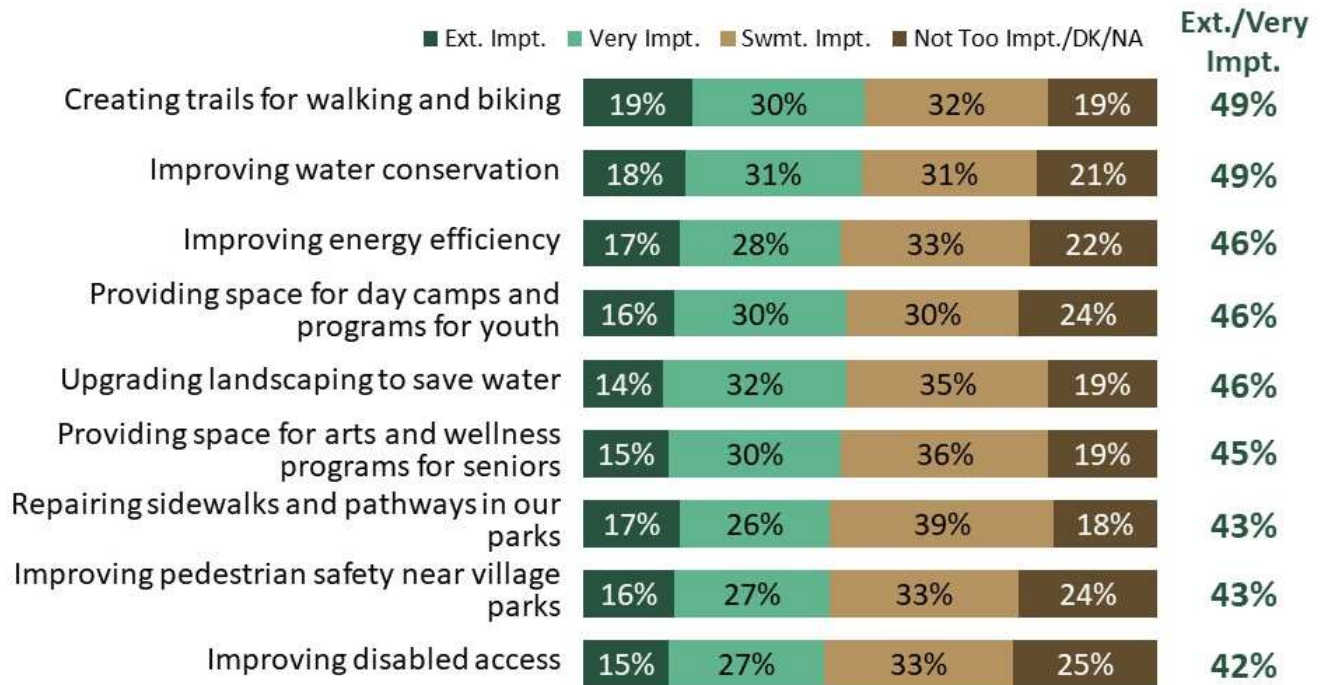


Priorities for Recreation and Park Funding

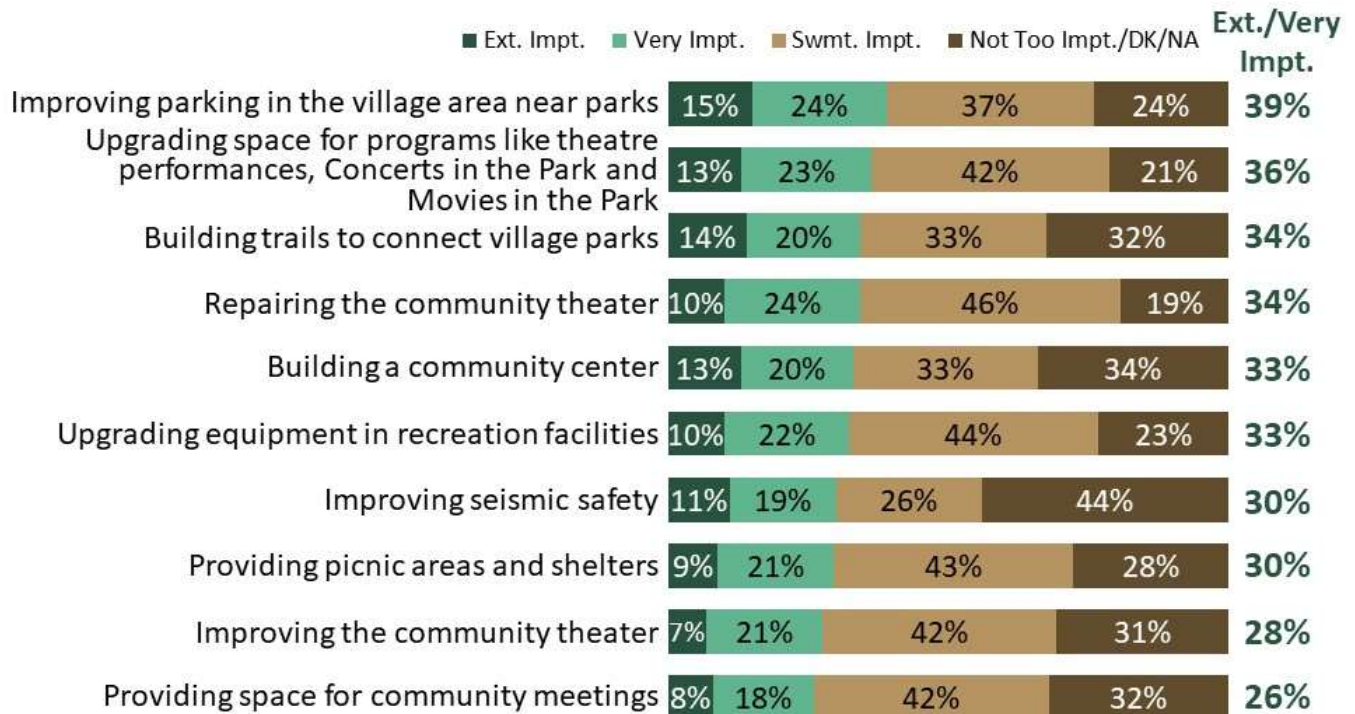
Voters' highest priorities are protecting open space and making basic repairs.



Relatively less-urgent priorities include walking and biking trails and efficiency improvements.



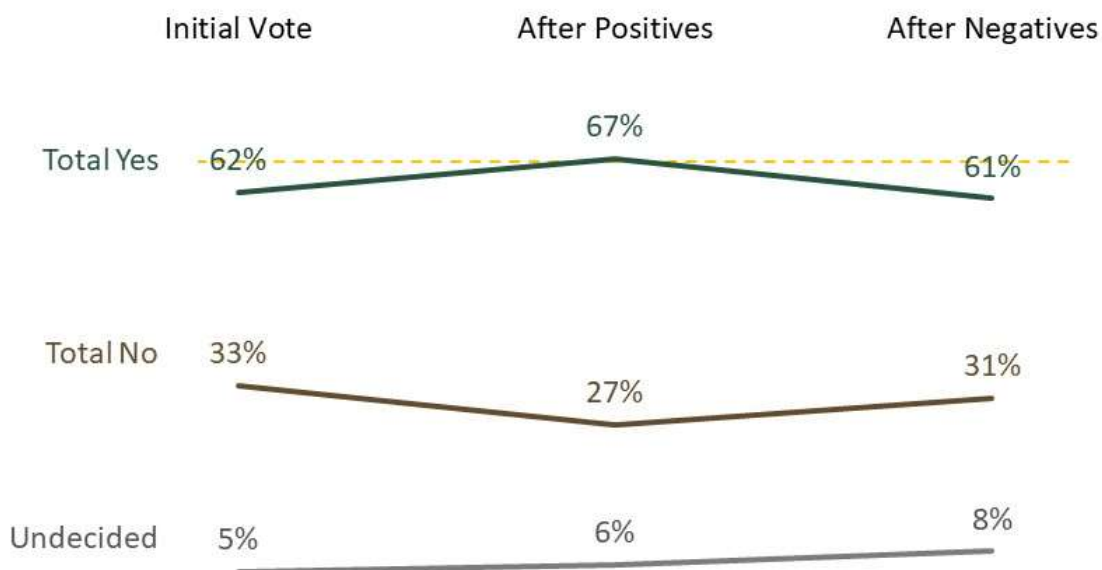
Fewer than two in five rate building anything new as very important.



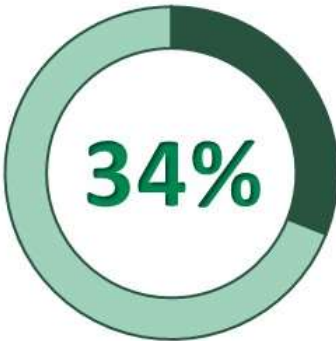


Messaging and Movement

The measure just meets the vote threshold after positive messaging, but support erodes again after critical statements.



About one-third of voters begin softly supportive of the bond measure.

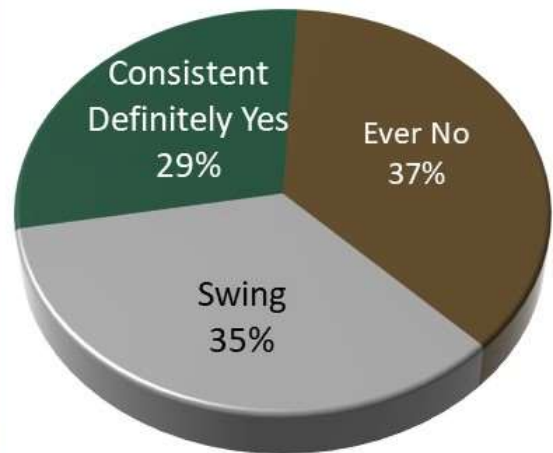


Voters Who Disproportionately Begin Probably/Lean Yes or Undecided ...

- ✓ Renters
- ✓ Voters under 50
- ✓ Independents
- ✓ Monthly park/recreation users

Segmenting the Electorate by Consistency of Support

- **Consistent Definitely Yes:** Voters who consistently indicated they would “definitely” vote yes – frequent park-goers, Democrats, and moms.
- **Ever No:** Voters who at any point indicated they would oppose the measure – Republicans, low-income voters, and those who do not visit the parks.
- **Swing:** Voters who do not fall into the other categories – remaining consistently undecided or switching intensity of their position. These are disproportionately voters under 50, particularly independents, Democrats and women.



Support Messages

(Ranked in Order of Effectiveness)

(HEALTH: KIDS) In today's digital age it is more important than ever to preserve places where children can run, play and experience nature. This measure will improve our system of parks, trails and natural areas - as well as youth sports and recreation programs - giving more kids access to outdoor activities that will improve their overall physical health and well-being.

(SECURITY) These measures would fund vital upgrades to safety at our parks, and facilities, such as improved lighting and more security patrols to prevent vandalism, car break-ins and drug use. This will ensure our parks and facilities are safe for everyone who wants to use them.

(PROPERTY VALUES) The presence of well-maintained, quality neighborhood parks increases local property values and helps to attract and retain businesses. By investing in our parks, this measure will help protect the value of our homes.

(NEEDS) The majority of our recreation facilities and parks were built decades ago, and some haven't seen major upgrades in 50 years. This measure will upgrade disabled access, seismic safety, and energy and water efficiency at our facilities and parks.

(INDEPENDENT) Funding from this measure will go only to the Fair Oaks Recreation and Park District, which is an entity independent of any city or county government. That means all funds can only be spent on parks and recreation projects right here in our community.

^(COST OF LIVING) Good-quality parks and community centers provide an affordable place for recreation close to home. As the cost of living increases, it is more important than ever to invest in keeping places to exercise, learn and play that are available to all.

Support Messages; Continued

(Ranked in Order of Effectiveness)

^(ACCOUNTABILITY) This measure sets firm standards for accountability and taxpayer protection. It requires annual audits, citizens oversight, and that money be spent according to a specific plan that voters can read before the election.

^(LONG RUN) The longer we wait to repair our parks and recreation infrastructure, the more it will cost us in the long run. By making the investment to take care of our parks and recreation system today, we can avoid more costly problems in future years.

(SAFETY) This measure will make parks safer for our children to play in. It will pay for new lighting, security cameras, and repairs to equipment. It will also provide positive recreation alternatives to help keep kids out of trouble and off the streets.

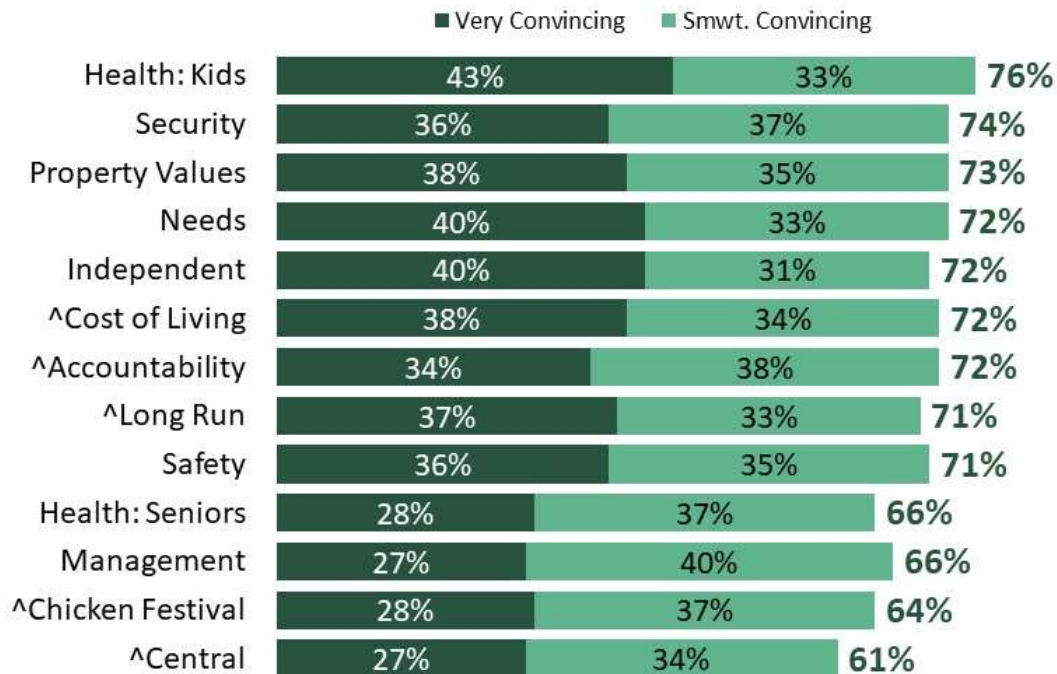
(HEALTH: SENIORS) In the next five years, more than one-third of Fair Oaks' population will be over age 55. This measure will improve our system of parks, trails and facilities - as well as wellness programs for seniors - giving seniors access to activities that will improve their overall physical health and well-being.

(MANAGEMENT) Unlike other governments throughout the state, Fair Oaks Recreation and Parks Department was able to maintain service levels and maintenance during the Recession. They have proven their ability to manage taxpayer dollars effectively and efficiently.

^(CHICKEN FESTIVAL) Each year, approximately 15,000 people attend the Chicken Festival, supporting our local businesses and boosting our economy. This measure would invest in improving our park landscaping, bathrooms and parking, making our community welcoming for even more visitors in the coming years.

^(CENTRAL) Fair Oak's recreation programs are currently fragmented in sites all over the community, with many classes and events held in buildings that are aging and in need of major repairs. This measure would build one, central community center that meets current disabled access and seismic safety standards, and is more energy and water efficient.

A message about kids' health is the most persuasive among a set that resonate broadly.



Support message ranking is similar for persuadable voters as for voters overall.

(Very Convincing)

Support Message	All Voters	Initially Undecided	Cons. Def. Yes	Ever No	Swing
Health: Kids	43%	50%	63%	18%	52%
Independent	40%	38%	72%	15%	42%
Needs	40%	44%	65%	13%	46%
^Cost of Living	38%	40%	65%	13%	43%
Property Values	38%	42%	64%	15%	42%
^Long Run	37%	37%	68%	13%	38%
Security	36%	35%	58%	17%	38%
Safety	36%	37%	70%	9%	39%
^Accountability	34%	35%	55%	14%	37%
Health: Kids	28%	24%	61%	6%	27%
^Chicken Festival	28%	24%	48%	13%	26%
^Central	27%	25%	56%	7%	25%
Management	27%	25%	45%	9%	29%

Opposition Messages

(Ranked in Order of Effectiveness)

***(TOO MUCH)** This measure would fund an entirely new community center and fully remodeled theater that are used by a small subset of the community. We should consider other, less costly options like repairing what we have first.

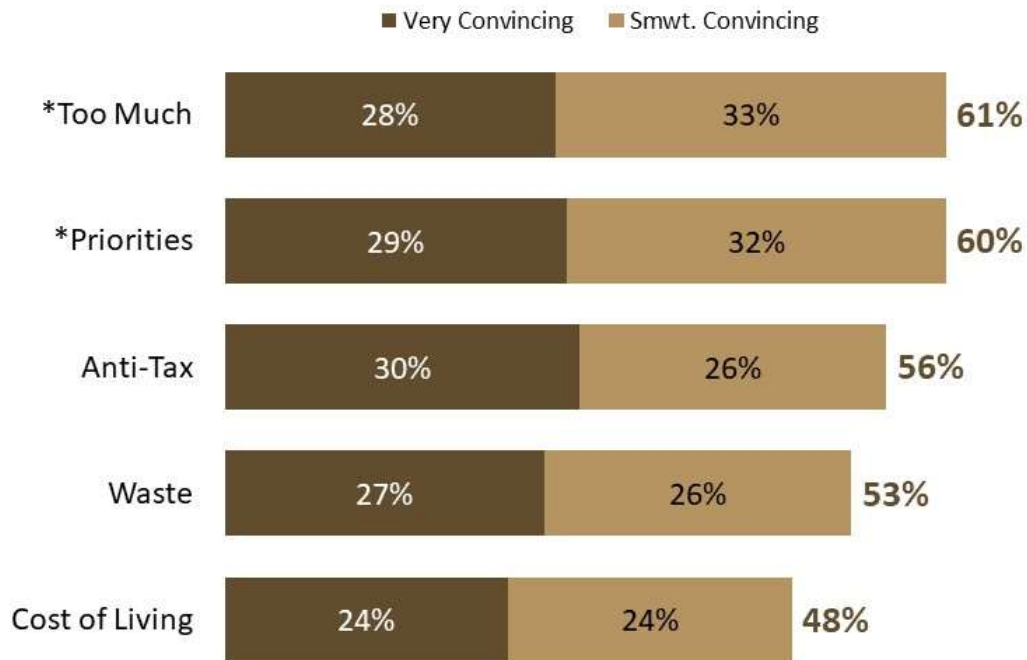
***(PRIORITIES)** Now is not the time to dedicate more taxes to pay for a brand-new recreation center - not when our community has so many more urgent needs, like public safety, road repairs, and attracting and retaining local businesses.

(ANTI-TAX) Voters just approved a statewide school bond in November. Now the gas tax is going up again and the federal tax law is going to be particularly hard on California homeowners. We should not vote for anything that will increase our taxes.

(WASTE) The District has enough taxpayer dollars to repair and upgrade our parks if they would just cut waste and mismanagement. Rather than raising our taxes, District officials should tighten their belts and find money in the existing budget.

(COST OF LIVING) The cost of living is already too high, and this measure will cost the average taxpayer over \$85 per year.

These messages are less persuasive in general than the positive ones.



Opposition messages are not particularly effective among persuadable voters.

(Very Convincing)

Support Message	All Voters	Initially Undecided	Cons. Def. Yes	Ever No	Swing
Anti-Tax	30%	19%	5%	65%	14%
*Priorities	29%	19%	6%	60%	16%
*Too Much	28%	17%	13%	51%	14%
Waste	27%	17%	8%	56%	13%
Cost of Living	24%	19%	7%	46%	15%



Conclusions

Conclusions

- ✓ A two-thirds requirement park bond for November 2018 does not appear viable.
 - The bond measure tested begins with support below the 67% required.
 - While positive messaging improves the share of the “yes” vote, it is still within the margin of error for passage, and critical statements erode support.
 - The condition and safety of local parks are much less-urgent concerns in the community than things like road repairs.
- ✓ However, voters are feeling positive about life in the area generally, and the District has very high approval ratings.
- ✓ Many see a need for funding generally, though this is not particularly intense. More education about the District’s needs will be important to the success of a future ballot measure.
- ✓ Protection of open space and basic repairs are their top priorities for the system; very few prioritize upgrades and new building of a community center, amphitheater or theater.
- ✓ More than one-quarter use District facilities at least once a week, and those are the voters most supportive of a measure.

For more information, contact:



OPINION
RESEARCH
& STRATEGY

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Oakland, CA 94612
Phone (510) 451-9521
Fax (510) 451-0384

Dave Metz

Dave@FM3research.com

Miranda Everitt

Miranda@FM3research.com

**PROFESSIONAL SERVICES AGREEMENT
BETWEEN THE PLEASANT VALLEY
RECREATION & PARK DISTRICT
AND
CONSULTANT, INC.**

This agreement is made and entered into, effective [REDACTED] between the PLEASANT VALLEY RECREATION AND PARK DISTRICT, a public agency (“District”), and [REDACTED], a California [REDACTED] (“Consultant”).

RECITALS

WHEREAS, following District’s Request for Proposal process, the District desires to contract with Consultant for certain professional planning services necessary for the development of an Open Space, Trail, and Greenway Planning Study (“Project”).

WHEREAS, Consultant represents that it has the qualifications and technical skills, experience and expertise to perform these services for the District.

NOW THEREFORE, based on the terms and conditions herein, the parties agree as follows:

1. Scope of Services

Consultant shall perform the professional services required to complete the Project for the District as described in the Scope of Work August 2017 attached as Exhibit “B” and incorporated by reference herein.

All work and services by Consultant shall be performed in a diligent and professional manner.

Consultant warrants that its services shall be performed, within the limits prescribed by the District, in a manner consistent with the level of care and skill ordinarily exercised by environmental, planning, and engineering professionals under similar circumstances at the time its services are performed. No other warranty or representation, express or implied, is included or intended by Consultant’s Proposal, this Agreement, or any reports or documents prepared herewithin.

Consultant agrees to undertake the discrete tasks outlined in Exhibit “B” only upon consultation with and authorization from the District’s General Manager and Park Superintendent.

As further described on Exhibit “B”, Consultant’s Services include:

- c. Pursuant to this Agreement, Consultant is rendering professional services only and any payments made to it are compensation solely for such services as it may render and recommendations it may make in the performance of services.

5. Compliance with Laws

Consultant will be solely responsible for giving all notices and complying with any and all applicable laws, ordinances, rules, regulations and lawful orders of any public authority relating to Consultant's work, including but not limited to those relating to copyright, trademark or other intellectual property matters.

6. Licenses, Permits, Fees and Assessments.

Consultant shall obtain at its sole cost and expense, such licenses, permits and approvals as may be required by law for the performance of the services required by this Agreement. Consultant shall have the sole obligation to pay for any fees, assessments, taxes, including applicable penalties and interest, which may be imposed by law and arise from or are necessary for the Consultant's performance of the services required by this Agreement; and shall indemnify, defend and hold harmless District against any claim for such fees, assessments, taxes, penalties or interest levied, assessed or imposed against District hereunder.

7. Environmental Laws.

Consultant shall comply with all applicable environmental laws, ordinances, codes and regulations of Federal, State, and local governments. Consultant shall also comply with all applicable mandatory standards and policies relating to energy efficiency.

8. Acknowledgment of Relationship

Consultant agrees that all dealings of the parties under this Agreement shall be confidential, and writings, reports, data, information or communication developed, prepared or assembled by Consultant under this Agreement, or any information made available to Consultant by District, shall not be revealed, disseminated or made available by Consultant to any person or entity other than District without the prior written consent of District, unless otherwise required by subpoena or applicable law.

9. Payment to Consultant

- a. District shall pay Consultant monthly in proportion to the services performed plus reimbursable expenses and charges for additional services within thirty (30) days after receipt of Consultant's invoices in a form approved by District's, with the

exception of any disputed amounts which shall be withheld until resolution of the dispute. Payment terms are further described on Exhibit "C".

Total Project Cost not to Exceed: \$ _____

- b. No payment made under this Agreement shall be conclusive evidence of Consultant's performance of the Agreement, either wholly or in part, and no payment shall be construed to be an acceptance of Consultant's work.

10. Assistance by District

District agrees to provide to Consultant available information of relevance to Consultant's work, including all data and documents pertaining to the Project. District pledges to work cooperatively with Consultant and render all reasonable assistance toward completion of Consultant's work.

The District's Project Manager shall be Mary Otten, General Manager.

11. Ownership of Documentation

All maps, data, reports and other documentation (other than Consultant's drafts, notes and internal memoranda), including duplication of same prepared by Consultant in the performance of these services, shall become the property of the District and shall be retained by the Consultant for a period of three years after completion of the Project. If requested by the District, all, or the designated portions of such documentation, shall be delivered to the District.

12. Termination of Contract

Consultant specifically acknowledges and agrees that the District may at any time during the term of this Agreement terminate Consultant's services with or without cause, and without penalty, at the completion of any phase of Consultant's services as set forth in Exhibit "B." Any termination or any special instructions hereunder from District shall be made in writing. In the event this Agreement is terminated, all data, specifications, documents and information generated by Consultant in connection with the Project shall be delivered to District and may be used by District. Copies of these materials may be retained by Consultant.

13. Indemnification and Hold Harmless; Insurance Requirements

- a. Indemnity for Professional Liability. When the law establishes a professional standard of care for Consultant's services, to the fullest extent permitted by law, Consultant shall indemnify, defend and hold harmless District and its officers, employees, agents (the "District's Parties") from and

against any and all losses, liabilities, damages, costs and expenses, including attorneys' fees and costs to the extent same are caused in whole or in part by any negligent or wrongful act, error or omission of Consultant, its officers, agents, employees of subcontractors (or any entity or individual for which Consultant shall bear legal liability) in the performance of professional services under this Agreement.

b. Indemnity for Other Than Professional Liability. Other than in the performance of professional services and to the full extent permitted by law, Consultant shall indemnify, defend and hold harmless District and District's Parties from and against any liability (including liability for claims, suits, actions, losses, expenses or costs of any kind, whether actual, alleged or threatened, including attorneys' fees and costs, court costs, defense costs and expert witness fees), where the same arise out of, are a consequence of, or are in any way attributable to, in whole or in part, the performance of this Agreement by Consultant or by any individual or entity for which Consultant is legally liable, including but not limited to officers, agents, employees or subcontractors of Consultant.

c. Submission of insurance certificates or other proof of coverage shall not relieve Consultant from liability under this indemnification and hold harmless provisions. These provisions shall survive the termination of this Agreement and shall apply whether or not such insurance policies shall have been determined to be applicable to any of such damages or claims for damages.

d. Prior to the commencement of the Project, Consultant shall provide District with proof of the types and amounts of insurance described on Exhibit "A".

14. No Assignment

This Agreement is a personal services contract and work hereunder shall not be delegated or assigned by Consultant to any person or entity without the advance written consent of District. Consultant shall not employ any subcontractors for its work.

15. Examination of Records

Consultant agrees that District shall have access to and the right to examine at any reasonable time and on reasonable notice Consultant's documents, papers and records, including accounting records, relating to or involving this Agreement.

16. Notice

All notices or other official correspondence relating to contractual matters between the parties shall be made by depositing the same as first-class, postage paid mail addressed as follows:

To Consultant: _____

To District: PLEASANT VALLEY RECREATION & PARK DISTRICT
Attn: Mary Otten, General Manager
1605 E. Burnley Street
Camarillo, CA 93010

or such other address as either party may designate hereinafter in writing delivered to the other party. All notices shall be agreed to have been received three (3) days after mailing.

17. No Waiver

No failure or delay by District in asserting any of District’s rights and remedies as to any default of Consultant shall operate as a waiver of the default, of any subsequent or other default by Consultant, or of any of District’s rights or remedies. No such delay shall deprive District of its right to institute and maintain any actions or proceeding which may be necessary to protect, assert or enforce any rights or remedies arising out of this Agreement or the performance of this Agreement.

18. Partial Invalidity

If any term, covenant, condition, or provision of this Agreement is found by a court of competent jurisdiction to be invalid, void, or unenforceable, the remainder of the provisions hereof shall remain in full force and effect, and shall in no way be affected, impaired, or invalidated thereby.

19. Terms

No alteration or variation of the terms of this Agreement shall be valid unless made in writing and signed by the parties. No oral understanding or agreement not incorporated herein shall be binding on any of the parties.

20. Incorporation of Recitals

The foregoing recitals are incorporated herein as though fully set forth.

21. California Law

This Agreement shall be interpreted and construed pursuant to the laws of the State of California. Any dispute between the parties shall be filed and heard in a court of competent jurisdiction in the County of Ventura, State of California.

22. Additional Provisions

Consultant agrees that no full time employee of District shall be employed by its firm during the period that this Agreement is in effect.

23. Attorneys' Fees.

If either party to this Agreement is required to initiate or defend or made a party to any action or proceeding in any way connected with this Agreement, the prevailing party in such action or proceeding, in addition to any other relief which may be granted, shall be entitled to reasonable attorneys' fees, whether or not the matter proceeds to judgment, and to all other reasonable costs for investigating such action, taking depositions and discovery, including all other necessary costs the court allows which are incurred in such litigation.

24. Conflict of Interest.

Consultant warrants that it has not paid or given and will not pay or give any third party any money or other consideration for obtaining this Agreement. Consultant shall comply with all conflict of interest laws and regulations.

25. Interpretation.

The terms of this Agreement shall be construed in accordance with the meaning of the language used and shall not be construed for or against either party by reason of the authorship of this Agreement or any other rule of construction which might otherwise apply.

26. Corporate Authority.

The persons executing this Agreement on behalf of the parties hereto warrant that (i) such party is duly organized and existing, (ii) they are duly authorized to execute and deliver this Agreement on behalf of said party, (iii) by so executing this Agreement, such party is formally bound to the provisions of this Agreement, and (iv) the entering into this Agreement does not violate any provision of any other Agreement to which said party is bound.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement the day and year first above written.

DISTRICT:
PLEASANT VALLEY RECREATION &
PARK DISTRICT

By: _____
Mary Otten, General Manager

ATTEST:

INSERT

CONSULTANT:
XXXX, a California corporation &
PARK DISTRICT

By: _____
Name: _____
Its: _____

By: _____
Name: _____
Its: _____

EXHIBIT "A"

**PLEASANT VALLEY RECREATION & PARK DISTRICT
INSURANCE REQUIREMENTS**

Consultant shall procure and maintain for the duration of the Agreement (and thereafter as specified herein) insurance against claims for injuries to persons or damage to property which may arise from or in connection with the performance of the work hereunder by Consultant, his agents, representatives, employees or subcontractors.

MINIMUM SCOPE OF INSURANCE

Coverage shall be at least as broad as:

1. Insurance Services Office Commercial General Liability coverage (occurrence form CG 00 01).
2. Insurance Services Office form number CA 00 01 covering Automobile Liability, Code 1 (any auto).
3. Workers' Compensation insurance as required by the State of California and Employer's Liability Insurance.

MINIMUM LIMITS OF INSURANCE

Consultant shall maintain limits no less than:

1. General Liability (Including operations, products and completed operations, as applicable): \$1,000,000 per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to this project/location or the general aggregate limit shall be twice the required occurrence limit.
2. Automobile Liability: \$1,000,000 per accident for bodily injury and property damage.
3. Employer's Liability: \$1,000,000 per accident for bodily injury or disease.
4. Errors and Omissions Liability: A policy of professional liability insurance in an amount not less than \$1,000,000 per occurrence.

5. Contractors Pollution Liability: N/A
6. Asbestos Pollution Liability: N/A

DEDUCTIBLES AND SELF-INSURED RETENTION

Any deductibles or self-insured retentions must be declared to and approved by the District. At the option of the District, either (1) the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects the District and its directors, officers, employees, agents and volunteers (collectively "District Parties"), or (2) Consultant shall provide a financial guarantee satisfactory to the District guaranteeing payment of losses and related investigations, claim administration and defense expenses.

OTHER INSURANCE PROVISIONS`

The commercial general liability and automobile liability policies are to contain, or be endorsed to contain, the following provisions:

1. The District and District Parties are to be covered as insured's as respects: liability arising out of work or operations performed by or on behalf of the Architect; or automobiles owned, leased, hired or borrowed by Consultant.
2. For any claims related to this Agreement, Consultant's insurance coverage shall be primary insurance as respects the District and District Parties. Any insurance or self-insurance maintained by the District and District Parties shall be excess of the Consultant's insurance and shall not contribute with it.
3. Each insurance policy required by this clause shall be endorsed to state that coverage shall not be canceled by either party, except after thirty (30) day's prior written notice has been provided to the District.

If General Liability, Contractors Pollution Liability and/or Asbestos Pollution Liability and/or Errors & Omissions coverage's are written on a claims-made form:

1. The retroactive date must be shown, and must be before the date of this Agreement or the beginning of work on the Project.
2. Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after completion of the contract of the Project.
3. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a retroactive date prior to the Agreement

effective date, Consultant must purchase an extended period coverage for a minimum of five (5) years after completion of the Project.

4. A copy of the claims reporting requirements must be submitted to the District for review and approval.

ACCEPTABILITY OF INSURERS

Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A: VII, unless otherwise acceptable to the District. Exception may be made for the State Compensation Insurance Fund when not specifically rated.

VERIFICATION OF COVERAGE

Consultant shall furnish the District with original certificates and amendatory endorsements effecting coverage required by this clause. The endorsements should be on forms provided by the District, or on other than the District's forms provided those endorsements conform to District requirements and are acceptable to the District. All certificates and endorsements are to be received and approved by the District before work commences. However, failure to do so shall not operate as a waiver of these insurance requirements. The District reserves the right to require complete, certified copies of all required insurance policies, including endorsements affecting the coverage required by these specifications at any time.

SUB-CONTRACTORS

Consultant shall include all subcontractors as insured's under its policies or shall furnish separate certificates and endorsements for each subcontractor. All coverage's for subcontractor shall be subject to all of the requirements stated herein.

END OF PAGE

EXHIBIT "B"
SCOPE OF WORK

DRAFT

EXHIBIT "C"
COMPENSATION

DRAFT



OPINION
RESEARCH
& STRATEGY

TO Mary Otten, General Manager
Pleasant Valley Recreation & Park District

FROM Dr. Richard Bernard
FM3 Research

RE: Scope of Work for Pleasant Valley Recreation & Park District Professional Polling/Public Opinion
Research Services

DATE June 14, 2022

Fairbank, Maslin, Maullin, Metz & Associates (FM3) is pleased to submit this scope of work to conduct research assessing community attitudes in the Pleasant Valley Recreation & Park District.

PROPOSED RESEARCH SPECIFICATIONS AND ESTIMATED COSTS

Methodology Dual-mode survey, conducted online and via telephone (cellular and landline)

Contact Methodology Email, Telephone (cellular and landline), Text messages

Questionnaire 15- to 20-minutes

Sample 400 registered Pleasant Valley Recreation & Park District voters likely to vote in the November 2024 General Election

Margin of Sampling Error ± 4.9 percent in 95 out of 100 cases for a sample of 400

Language English and Spanish

Deliverables Following the completion of the survey, we will provide:

- A final questionnaire
- A complete analysis of survey results
- Presentation of the survey results

Cost FM3 is prepared to conduct the proposed research for a cost of \$29,000 to \$32,000, depending on the length of survey selected. This price is comprehensive, and includes all costs for questionnaire design, translation, sample acquisition, programming, email invitations, online survey hosting in English, telephone interviewing in English and Spanish,

data entry and analysis, and reporting. While meetings can occur on Zoom, if travel to the District office occurs, mileage will be billed at the IRS Business Mileage Rate. A round trip is 98.6 miles.

FM3 can begin the research immediately. We look forward to working with you on this research, and if you have any questions or if there is any further information we can provide, please do not hesitate to contact us. Thank you for your consideration and you may reach us as follows:

Dr. Richard Bernard, Partner
Fairbank, Maslin, Maullin, Metz & Associates (FM3)
12100 Wilshire Boulevard, Suite 350
Los Angeles, CA 90025
(310) 428-1809 (Cell)
Bernard@FM3Research.com

**PLEASANT VALLEY RECREATION AND PARK DISTRICT
STAFF REPORT / AGENDA REPORT**

TO: BOARD OF DIRECTORS

FROM: MARY OTTEN, GENERAL MANAGER
By: Kathryn Drewry, Human Resources Specialist

DATE: July 6, 2022

**SUBJECT: CONSIDERATION AND APPROVAL OF FULL-TIME
AND PART-TIME YEAR-ROUND SALARY SCHEDULE**

BACKGROUND

The Salary Schedule is utilized by staff when hiring as well as using it as a guide when awarding merit increases to staff. The schedule is typically updated when job classifications are added or changed, if there is an adjustment made in minimum wage, or when the Board awards a COLA.

ANALYSIS

The 2022/2023 budget that was presented to the Board of Directors in April 2022 and again in May 2022 included the 2% COLA for SEIU Local 721 members as well as a 2% COLA for non-represented employees.

FISCAL IMPACT

There is no additional impact to the budget.

RECOMMENDATION

It is recommended the Board consider and approve the updated 2022/2023 Salary Schedule which includes the 2% COLA for both represented and non-represented employees.

ATTACHMENTS

- 1) FY 2022/2023 Salary Schedule (1 page)



FULL TIME/PART TIME YEAR ROUND CLASSIFICATIONS AND SALARY RANGES

	Bi-Weekly Hourly		Bi-Weekly Hourly	
GENERAL MANAGER	\$5,743.29 \$71.79		\$6,464.12 \$80.80	
ADMINISTRATIVE SERVICES MANAGER	\$4,423.08 \$55.29	\$4,511.54 \$56.39	\$5,307.70 \$66.35	\$5,413.85 \$67.67
ADMINISTRATIVE ANALYST	\$2,709.20 \$33.87	\$2,763.39 \$34.54	\$3,444.14 \$43.05	\$3,513.02 \$43.91
DEVELOPMENT ANALYST	\$2,709.20 \$33.87	\$2,763.39 \$34.54	\$3,444.14 \$43.05	\$3,513.02 \$43.91
HUMAN RESOURCES SPECIALIST	\$2,077.47 \$25.97	\$2,119.02 \$26.49	\$2,639.29 \$32.99	\$2,692.07 \$33.65
ACCOUNTING SPECIALIST	\$2,077.47 \$25.97	\$2,119.02 \$26.49	\$2,639.29 \$32.99	\$2,692.07 \$33.65
CUSTOMER SERVICE REP LEAD WORKER	\$1,848.58 \$23.11	\$1,885.55 \$23.57	\$2,348.81 \$29.36	\$2,395.78 \$29.95
CUSTOMER SERVICE REPRESENTATIVE I	\$1,528.97 \$19.11	\$1,559.55 \$19.49	\$1,942.63 \$24.28	\$1,981.49 \$24.77
CUSTOMER SERVICE REPRESENTATIVE II	\$1,681.29 \$21.02	\$1,714.91 \$21.44	\$2,136.57 \$26.71	\$2,179.30 \$27.24
RECREATION SERVICES MANAGER	\$3,280.17 \$41.00	\$3,345.78 \$41.82	\$4,166.59 \$52.08	\$4,249.93 \$53.12
RECREATION SUPERVISOR	\$2,709.20 \$33.87	\$2,763.39 \$34.54	\$3,444.14 \$43.05	\$3,513.02 \$43.91
RECREATION COORDINATOR	\$2,260.58 \$28.26	\$2,305.79 \$28.82	\$2,871.50 \$35.89	\$2,928.93 \$36.61
MARKETING SPECIALIST	\$1,694.60 \$21.18	\$1,728.50 \$21.61	\$2,152.38 \$26.90	\$2,195.43 \$27.44
RECREATION SPECIALIST	\$1,528.14 \$19.10	\$1,558.70 \$19.48	\$2,152.38 \$26.90	\$2,195.43 \$27.44
AQUATIC SPECIALIST	\$1,528.14 \$19.10	\$1,558.70 \$19.48	\$2,152.38 \$26.90	\$2,195.43 \$27.44
PARK SERVICES MANAGER	\$3,280.17 \$41.00	\$3,345.78 \$41.82	\$4,166.59 \$52.08	\$4,249.93 \$53.12
PARK SUPERVISOR	\$2,709.20 \$33.87	\$2,763.39 \$34.54	\$3,444.14 \$43.05	\$3,513.02 \$43.91
PARK MAINTENANCE LEAD WORKER	\$2,302.20 \$28.78	\$2,348.24 \$29.35	\$2,924.77 \$36.56	\$2,983.27 \$37.29
LEAD PARK RANGER	\$2,302.20 \$28.78	\$2,348.24 \$29.35	\$2,924.77 \$36.56	\$2,983.27 \$37.29
MECHANIC	\$2,302.20 \$28.78	\$2,348.24 \$29.35	\$2,924.77 \$36.56	\$2,983.27 \$37.29
IRRIGATION SPECIALIST	\$2,302.20 \$28.78	\$2,348.24 \$29.35	\$2,924.77 \$36.56	\$2,983.27 \$37.29
GROUNDS/FACILITIES I	\$1,731.23 \$21.64	\$1,765.85 \$22.07	\$2,200.65 \$27.51	\$2,244.67 \$28.06
GROUNDS/FACILITIES II	\$1,990.08 \$24.88	\$2,029.88 \$25.37	\$2,529.42 \$31.62	\$2,580.01 \$32.25

**PLEASANT VALLEY RECREATION AND PARK DISTRICT
STAFF REPORT / AGENDA REPORT**

TO: BOARD OF DIRECTORS

FROM: MARY OTTEN, GENERAL MANAGER
By: Nick Marienthal, Park Supervisor

DATE: July 6, 2022

**SUBJECT: CONSIDERATION AND APPROVAL OF CAMARILLO
GROVE PARK SEPTIC TANK REMOVAL AND
REPLACEMENT**

SUMMARY

Camarillo Grove Park was deeded to the District by the County of Ventura in 2001. The lifespan of a septic system varies widely from 15 years to 30 years. This is because there are many factors that affect a septic tank's life expectancy, including its materials and whether it has experienced damage from flooding, clogging by roots as well as maintenance protocols upon installation. Camarillo Grove Park hosts several large events throughout the year and is one of the District's busiest parks especially during the summer months. Currently, there are two sets of restrooms, however, due to the amount of use and the monthly cost (\$800) of port-a-potties, staff recommends replacing a septic tank system as soon as possible.

BACKGROUND

Septic tanks allow a safe disposal of wastewater and hence are widely popular in areas that are off the main sewage network. They work by collecting the wastewater in one big underground tank. The tank has two separate chambers which allow the solids to settle to the bottom in one chamber and can be pumped out when necessary and the second chamber is liquid which will go through a leach field. The tank is connected with two pipes (for inlet and outlet). The inlet pipe collects the water waste in the septic tank, for long enough that the solids and liquid waste separate. The outlet pipe also called the drain field, moves out the preprocessed wastewater from the septic tank and spreads it evenly into the soil and leach field to percolate into the ground.

The records provided by the County show the septic tank was installed in the early 1980's. On an annual basis in March, District staff has the septic tanks pumped out in preparation for the upcoming summer season. It was brought to staff's attention in March of 2022 that there were issues with restrooms located at the lower area of the park. Upon further inspection it was determined that the entire septic system had failed, the leach field was clogged, and the baffle wall which separates the waste and liquid had become delaminated from the tank. This allowed all the solids and liquids to be in the same chamber and overflow which led to the system completely giving up and backing up as well.

ANALYSIS

District staff was able to contact a contractor (ACCO) through Sourcewell, and use an existing Cooperative Purchasing Agreement, which will allow the District to forego the RFP process and expedite this project. There was a job walk May 18th with the District and ACCO to determine the scope of the project. The scope of the project will include the contractor to excavate the old system and dispose of it, install a new leach field, install a new 1,200-gallon septic tank, back fill with appropriate material, apply for all applicable permits from the County, and install temporary fencing around the site. Staff recommends closing the entire park for one week for safety reasons and so staff can do rodent abatement, which is difficult to do when there are patrons in the park.

FISCAL IMPACT

The Board of Directors allocated \$120,000 in its Capital Projects for Fiscal Year 22/23 for this project. ACCO's bid came back at \$72,605.21 and the District added a 15% contingency of \$10,891 for a total project cost of \$83,496.

STRATEGIC PLAN COMPLIANCE

Meets the 2021 Strategic Plan Goal and Strategy 3.1: Renovate and Modernize Existing Parks and Recreational Facilities.

RECOMMENDATION

It is recommended that the Board of Directors approve and authorize the General Manager to enter into an agreement with ACCO for the installation of a new septic system at the lower restrooms of Camarillo Grove Park in the amount of \$72,605.21 with a 15% contingency for a total not to exceed \$83,496 and allow a one-week closure of the entire park.

ATTACHMENTS

- 1) Contract (11 pages)
- 2) Scope of Service (7 pages)

CONTRACT FOR CAMARILLO GROVE PARK SEPTIC SYSTEM AGREEMENT

PLEASANT VALLEY RECREATION & PARK DISTRICT

1605 E. Burnley Street
Camarillo, CA 93010
Telephone (805) 482-1996 - FAX (805) 482-3468

Important terms of this **Construction Work** (“Agreement”) are printed on the following pages. For your protection, make sure that you read and understand all provisions before signing. The terms and conditions are incorporated in this document and will constitute a part of the contract between the parties when signed.

TO: ACCO Engineered Systems

Date: 07/6/2022

888 East Walnut St.
Pasadena, Ca 91101
PH (424) 201-0153

Pleasant Valley Recreation & Park District (“District”) retains Contractor, and Contractor agrees to perform the following work (the “work”) per its attached proposal (incorporated herein) dated. In the event of any conflict between the terms of Contractor’s proposal, the terms of this agreement shall govern.

DESCRIPTION OF WORK

Contractor will provide and install septic system, per agreed upon detailed scope of service, per manufacturer’s specifications.

Contract price: **\$72,605.21**
(Time and Materials) (Maximum Not-to-Exceed)
Completion Date/Working Days Allowed: 30 working days

Instructions: Please sign and return both originals along with appropriate insurance documentation. Upon acceptance by District a copy will be signed and promptly returned to you. Insert below the names of your authorized on-site representatives.

District:
Pleasant Valley Recreation and Park District
1605 E. Burnley St.
Camarillo, CA 93010

Contractor:
ACCO
888 East Walnut St.
Pasadena, Ca 91101

By: _____
Mary Otten
General Manager

By: _____
Name:
Title:

ATTEST: _____
Dylan Gunning
Clerk of Board

By: _____
Name:
Title:

**PLEASANT VALLEY RECREATION & PARK DISTRICT
CAMARILLO GROVE PARK SEPTIC SYSTEM
TERMS AND CONDITIONS**

Scope of Construction Work - Contractor shall diligently undertake and perform the construction work described in its proposal referenced above. District reserves the right in its discretion to award work outside the scope of Contractor's proposal to other contractors. Contractor represents and warrants that it, and applicable subcontractors, currently possesses the contractor's license(s) C-42 required by the State of California for performance of the type of work to be undertaken pursuant to this Agreement. At all times during the term of this Agreement, Contractor shall maintain in good standing such license(s) with the State of California. This contract prohibits work by contractors or subcontractors who are ineligible under [Lab C §§1777.1](#) and [1777.7](#).

The District will compensate the Contractor for utilities relocation work not shown on the District's plans and agrees that liquidated damages shall not be imposed for any delay caused by the District's or a public utility's failure to provide for removal or relocation of utility facilities.

Term of Agreement - All work to be done under this contract shall be completed within **thirty (30) consecutive working days**, exclusive of maintenance periods, beginning on the date stipulated in the written Notice to Proceed issued by the Project Manager. Unless otherwise earlier terminated as specified elsewhere herein, this Agreement shall commence on the date first set forth above and shall expire on the completion date set forth above.

Liquidated Damages in the amount of \$200/day will apply to this project.

Authorized Representatives - Contractor shall not accept direction or orders from any person other than the District's General Manager or any District authorized representative(s) listed on the signature page hereto.

Payment Terms - District shall pay compensation to Contractor on a time and material reimbursement basis for a maximum not to exceed amount of Seventy-Two Thousand Six- Hundred Five Dollars and Twenty-One Cents. (\$72,605.21) in accordance with Contractor's proposal referenced above. District shall pay Contractor within thirty (30) days after receipt of an undisputed and properly submitted payment request from the contractor, with the exception of any disputed amount(s) which may be withheld until resolution of the dispute, or the District will pay Contractor interest at the legal rate on any delayed progress payment. Any payment request not to be a proper payment request suitable for payment shall be returned to Contractor as soon within 7 days of receipt with a document stating in writing the reasons why the payment request is not proper. No payment made pursuant to this Agreement shall be conclusive evidence of Contractor's performance of the Agreement, either wholly or in part, and no payment shall be construed to be an acceptance of Contractor's work.

Changes To Work, Method, Cost, etc. - Any change in the scope of work, method of performance, nature of materials or price thereof, or any other matter materially affecting the performance or nature of the work, will not be paid for or accepted by District unless such change, deletion or addition is

approved in advance, in writing, or by a supplemental or amended change order executed by District's General Manager or authorized representative listed hereto.

Prevailing Wages Requirements - In entering into a public works contract, or a subcontract, to supply goods, services, or materials pursuant to a public works contract, the Contractor and all subcontractors agree to follow the State Labor standards, and federal standards when applicable. State Labor standards provisions, including prevailing wage requirements, will be enforced and the general rate of per diem wages (prevailing wage) shall be paid for each craft, classification, or type of worker needed to undertake all work contemplated in this Agreement. Contractor and all subcontractors must furnish electronic certified payroll records directly to the Labor Commissioner (aka Division of Labor Standards Enforcement). The State General Prevailing Wage Determination is as established by the California Department of Industrial Relations (available at <http://www.dir.ca.gov/DLSR/PWD/index.htm>). The prevailing rate of per diem wages are on file at the Pleasant Valley Recreation & Park District, Department of Parks, 1605 E. Burnley Street, Camarillo, CA 93010, will be posted at the job site, and are available to any interested party on request. Contractor shall comply with all statutory requirements relating to certified copies of payroll records, including maintenance of the records, their certification, and their availability for inspection. The statutory penalties for failing to pay prevailing wages and/or comply with wages and hour laws will be enforced. Contractor agrees that eight hours' labor constitutes a legal day's work.

Employment of Apprentices - Contractor and any subcontractor under the Contractor must comply with the requirements of California Labor Code Sections 1777.5 and 1777.6 regarding the employment of apprentices. The Contractor shall have full responsibility for compliance with said Labor Code sections for all apprenticeable occupations, regardless of any other contractual or employment relationships alleged to exist.

Award of Contract - Each contractor and subcontractor listed on the bid must be registered with the Department of Industrial Relations pursuant to Labor Code Section 1725.5, subject to the limited exceptions set forth in Labor Code Section 1771.1(a) (regarding the submission of a bid as authorized by Business & Professions Code Section 7029.1 or Public Contract Code Section 10164 or 20103.5, provided the contractor is registered to perform public work pursuant to Section 1725.5 at the time the contract is awarded).

Independent Contractor - It is the express intention of the parties that Contractor is an independent contractor and not District's employee; and that the employees of Contractor, and Contractor's subcontractors and their respective employees, are not District employees and are not entitled to any of the rights, benefits or privileges attributable to District employees. Contractor shall have control of the means, methods and details of performance of its work and services and shall only be subject to the general direction and supervision of District's General Manager or authorized representative listed hereto to ensure the results contracted for are achieved. The parties do not intend and shall not act as agents, employees or partners of one another.

Termination of Agreement - During its term, this Agreement may be sooner terminated by written notice of termination as follows:

A. By either party, in the event the defaulting party fails to cure a material breach of this Agreement within five (5) days of receipt of a written notice from the non-defaulting party of such material breach.

B. By District, without cause and without penalty or cost to District, immediately upon written notice, given in the sole discretion of District's General Manager or authorized representative. Termination without cause does not excuse District's obligation to compensate Contractor reasonably for work performed up until termination.

C. In the event of termination as provided in this section, District without penalty may relet or award the work to another Contractor or perform such work itself.

Indemnification - To the fullest extent permitted by law, Contractor shall defend, indemnify and hold District and its directors, officers, employees and agents, from and against:

A. Any and all claims, damages, lawsuits, actions, costs, expenses, losses or liabilities, including reasonable attorneys' and experts' fees and costs incurred in litigation (hereinafter collectively "claims"), in law or equity, of every kind or nature whatsoever, but not limited to injury or death of any person or damage to or the destruction of any property of any person, including District, its directors, officers, employees, or agents, or Contractor or its employees, agents or subcontractors, arising out of or in any manner directly or indirectly related to the work to be performed under this Agreement including prevailing wages, however caused, except and only to the extent caused by the active negligence, sole negligence or willful misconduct of District, its directors, officers, employees or agents.

B. Any and all actions, proceedings, damages, costs, expenses, penalties, fines, or liabilities, in law or equity, of every kind and nature whatsoever, arising out of, resulting from, or on account of any violation of any applicable federal, state or local governmental law, ordinance, rule or regulation, compliance with which is Contractor's responsibility.

C. Submission of insurance certificates or other proof of insurance shall not relieve Contractor from liability under these provisions. Contractor's indemnification obligations herein shall apply whether or not Contractor's insurance policies shall have been determined to apply to any such claims. These indemnification obligations shall survive the expiration or termination of this Agreement.

The District will timely notify Contractor of any third-party claims received related to this Agreement.

Laws, Regulations and Permits - At its expense, Contractor shall give all notices and (unless otherwise provided herein) obtain all permits for the work required by law, and comply with all applicable laws, ordinances, rules and regulations pertaining to the conduct of the work. Contractor shall be liable for all violations of law in connection with its performance of the work. If Contractor observes that any drawings or specifications provided are at variance with any law or ordinance, rule or regulation, Contractor shall promptly notify District's General Manager or authorized representative in writing and any necessary changes shall be made by written instruction or change order. If Contractor performs any work knowing it to be contrary to such laws, ordinances, rules or regulations and without giving notice to

the District's General Manager or authorized representative, Contractor shall bear all costs arising therefrom.

Safety - Contractor shall execute and maintain its work so as to avoid injury or damage to any person or property. Contractor shall designate, in writing, a responsible representative at the worksite whose duty shall be the prevention of accidents, and the maintenance and supervision of safety precautions and programs. This person shall be Contractor's superintendent unless otherwise designated in writing by Contractor.

In carrying out its work, Contractor shall at all times exercise all necessary precautions for the safety of employees appropriate to the nature of the work and the conditions under which the work is to be performed. Contractor shall comply with all applicable federal, state and local statutory and regulatory requirements, including State of California Department of Industrial Relations (Cal/OSHA) regulations; construction safety orders and safety orders; and the U.S. Department of Transportation Omnibus Transportation Employee Testing Act. Safety precautions, as applicable, shall include but shall not be limited to: adequate life protection and lifesaving equipment; first aid; adequate illumination; instructions in accident prevention for all employees, such as the use of machinery guards, safe walkways, scaffolds, fall protection, ladders, bridges, gang planks, confined space procedures, trenching and shoring, and other safety devices; equipment and wearing apparel as are necessary or lawfully required to prevent accidents, injuries, or illnesses; and adequate facilities for the proper inspection and maintenance of all safety measures.

Contractor shall be responsible for the safeguarding of all utilities. At least two (2) working days before beginning work, Contractor shall call the Underground Service Alert (USA) in order to determine the location of sub-structures. Contractor shall immediately notify District and the utility owner if Contractor disturbs, disconnects, or damages any utility.

For any work involving excavation of trenches of five (5) feet or more in depth, Contractor shall comply with the requirements of Section 6705 of the California Labor Code (including but not limited to preparation and submission of excavation/trench safety plans), which provisions are incorporated herein as if fully set forth. For any work pertaining to the digging of trenches or other excavations extending deeper than four (4) feet below the surface and the discovery of hazardous waste or subsurface or unknown latent physical conditions differing materially from those ordinarily encountered, Contractor shall comply with the requirements of California Public Contract Code Section 7104, which provisions are incorporated herein as if fully set forth.

Commercial General Liability and Automobile Liability Insurance - Contractor shall provide to District and shall maintain at all times during the performance of this Agreement, the following commercial general liability and automobile liability insurance:

Coverage - Coverage for commercial general liability and automobile liability insurance shall be at least as broad as the following:

1. Insurance Services Office (ISO) Commercial General Liability Coverage (Occurrence Form CG 0001)

2. Insurance Services Office (ISO) Business Automobile Liability Coverage (Form CA 0001), covering Symbol 1 (any auto)

Limits - The Contractor shall maintain limits no less than the following:

1. General Liability - One million dollars (\$1,000,000) per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with a general aggregate limit or products-completed operations aggregate limit is used, either the general aggregate limit shall apply separately to the project/location (with the ISO CG 2503, or ISO CG 2504, or insurer's equivalent endorsement provided to District) or the general aggregate limit and products-completed operations aggregate limit shall be twice the required occurrence limit.
2. Automobile Liability - One million dollars (\$1,000,000) for bodily injury and property damage each accident limit.

Required Provisions - The general liability and automobile liability policies are to contain, or be endorsed to contain, the following provisions:

1. District, its directors, officers, employees and agents are to be given insured status (via ISO endorsement CG 2010, CG 2033, or insurer's equivalent for general liability coverage) as respects: liability arising out of the activities performed by or on behalf of Contractor; products and completed operations of the Contractor; premises owned, occupied or used by Contractor; and automobiles owned, leased, hired or borrowed by Contractor. The coverage shall contain no special limitations on the scope of protection afforded to District, its directors, employees, or agents.
2. For any claims related to the work, Contractor's insurance shall be primary insurance as respects District, its directors, officers, employees, or agents. Any insurance, self-insurance, or other coverage maintained by District, or its directors, officers, employees, or agents shall not contribute to it.
3. Any failure to comply with reporting or other provisions of the policies including breaches of warranties shall not affect coverage provided to District, its directors, officers, employees, or agents.
4. Contractor's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.
5. Each insurance policy required by this Agreement shall state, or be endorsed to state, that coverage shall not be canceled by the insurance carrier or Contractor, except after thirty (30) days (10 days for non-payment of premium) prior written notice by U.S. mail has been given to District.

Such liability insurance shall indemnify Contractor and its subcontractors against loss from liability imposed by law upon, or assumed under contract by, Contractor or its subcontractors for damages on account of such bodily injury (including death), property damage, personal injury, completed operations,

and products liability.

The general liability policy shall cover bodily injury and property damage liability, owned and non-owned equipment, blanket contractual liability, completed operations liability, explosion, collapse, underground excavation, and removal of lateral support.

The automobile liability policy shall cover all owned, non-owned, and hired automobiles.

All of the insurance shall be provided on policy forms and through companies satisfactory to District.

Deductibles and Self-Insured Retentions - Any deductible or self-insured retention must be declared to and approved by District. At the option of District, the insurer shall either reduce or eliminate such deductibles or self-insured retentions as respects District, its directors, officers, employees and agents; or Contractor shall procure a bond guaranteeing payment of losses and related investigations, claim administration and defense expenses.

Acceptability of Insurers - Insurance is to be placed with insurers meeting current A.M. Best rating of no less than A-: VII or equivalent or as otherwise approved by District.

Workers' Compensation Insurance - By its signature hereunder, Contractor certifies that it is aware of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and Contractor will comply with such provisions before commencing the performance of the work of this Agreement. Before starting work on this project, Contractor shall sign and file with the District this statement acknowledging these obligations:

"I am aware of the provisions of Section 3700 of the Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this contract.

Workers' Compensation and Employer's Liability Insurance - Contractor and all subcontractors shall insure (or be a qualified self-insured) under the applicable laws relating to workers' compensation insurance, all of their employees working on or about the construction site, in accordance with the "*Workers' Compensation and Insurance Act*," Division IV of the Labor Code of the State of California and any Acts amendatory thereof. Contractor shall provide employer's liability insurance in the amount of, at least, \$1,000,000 each accident, \$1,000,000 disease policy limit, and \$1,000,000 disease each employee. Contractor's Workers' Compensation policy shall be endorsed with a waiver of subrogation in favor of District for all work performed by Contractor, its employees, agents and subcontractors.

Responsibility for Work - Until the completion and final acceptance by District of all the work under and implied by this Agreement, the work shall be under Contractor's responsible care and charge. Contractor shall rebuild, repair, restore and make good all injuries, damages, re-erections, and repairs occasioned or rendered necessary by causes of any nature, except those beyond Contractor's control.

Contractor shall waive all rights of subrogation by any insurer of Contractor against District, its directors, officers, employees, and agents. Contractor shall procure and provide endorsement(s) to District to this effect.

Examination and Audit - All documents and records that relate in any way to this Agreement shall be maintained for a period of four years after the final payment under this Agreement. These records shall be subject to the examination and audit by the District and by the State Auditor, at the request of the District or as part of any audit of the District, for a period of three years after final payment under the Agreement.

Evidences of Insurance - Prior to execution of the Agreement, Contractor shall file with District a certificate of insurance (Acord Form 25-S or equivalent) signed by the insurer's representative evidencing the coverage required by this Agreement. Such evidence shall include an additional insured endorsement signed by the insurer's representative and evidence of waiver of rights of subrogation against District. Such evidence shall also include confirmation that coverage includes or has been modified to include Required Provisions 1-5.

Contractor shall, upon demand of District, deliver to District such policy or policies of insurance and the receipts for payment of premiums thereon.

Continuation of Coverage - If any of the required coverages expire during the term of this Agreement, Contractor shall deliver the renewal certificate(s) including the general liability additional insured endorsement and evidence of waiver of rights of subrogation against District at least ten (10) days prior to the expiration date.

Subcontractors - In the event that (with District's approval) Contractor employs other contractors (subcontractors) as part of the work covered by this Agreement, it shall be Contractor's responsibility to require and confirm that each subcontractor meets the minimum insurance requirements specified above. Contractor shall promptly pay all subcontractors and materials suppliers consistent with law.

Notices - All notices, requests, demands and other communications under this Agreement shall be in writing and shall be deemed to have been duly given on the date of service if personally served or on the second day after mailing if mailed by first-class mail, registered or certified, return receipt requested, postage prepaid and properly addressed to the signatories of the parties as set forth above. Any party may change their address for the purpose of this paragraph by giving the other party written notice of the new address in the above manner.

Anti-Discrimination - Contractor shall not exclude from its employment in the performance of this Agreement any person on the grounds of race, creed, color, sex, age, marital status, sexual orientation or place of national origin. Contractor shall comply with all applicable local, state and federal laws relating to equal employment opportunity rights.

No Assigns or Subcontractors Without Consent of District - Contractor shall not assign this Agreement, or utilize subcontractors in the performance of the work, without the written consent of District's General Manager. District may withhold such consent in its sole discretion.

No Waiver - No failure by District in asserting any of its rights or remedies as to any default of Contractor shall operate as a waiver of the default, or any subsequent or other default by Contractor, or of any of District's rights or remedies. No such delay shall deprive District of its right to institute and

maintain any actions or proceedings which may be necessary to protect, assert, or enforce any rights or remedies arising out of this Agreement or the performance thereof.

Partial Invalidity - If any term, covenant, condition or provision of this Agreement is found by a court of competent jurisdiction to be invalid, void or unenforceable, the remainder of the provisions herein shall remain in full force and effect and shall not be affected, impaired or invalidated thereby.

Integration - No alteration or variation of the terms of this Agreement shall be valid unless made in writing and signed by the parties. No oral understanding or agreement not incorporated herein shall be binding on any of the parties.

Rules of Interpretation - The terms of this Agreement have been negotiated by the parties and the language used herein shall be deemed to be the language chosen by the parties to express their mutual intent. This Agreement shall be construed without regard to any presumption or rule requiring construction against the party causing such instrument to be drafted, or in favor of the party receiving a particular benefit under this Agreement. No rule of strict construction shall be applied against any party to this Agreement.

California Law - This Agreement shall be interpreted and construed pursuant to the laws of the State of California. Any provisions of law which are applicable to this Agreement, even if not specifically included herein, are incorporated by reference herein as if set forth in full, and Contractor shall comply with such provisions.

Disputes - Any dispute between the parties shall be filed and heard in a court of competent jurisdiction in the County of Ventura.

District Employees - Contractor agrees that no employee of District shall be employed by Contractor during the period this Agreement is in effect.

Guarantee - Contractor hereby guarantees that the entire work constructed and/or performed by it under this Agreement will meet fully all requirements thereon as to quality of workmanship and of materials furnished by Contractor. If District notifies Contractor of any defects in quality of workmanship or materials within one (1) year following the completion of work, Contractor at its expense, with no charge to District, shall repair such work and/or replace such materials.

Payment Bond - If the cost of the construction work exceeds \$25,000.00, Contractor shall furnish to District a payment bond, in a form satisfactory to District, from a surety insurer admitted in California. Premiums for the payment bond shall be compensable to Contractor (without markup).

Retention - The District will deduct a five percent (5%) retention from all progress payments as specified in Section 9-3.2 of the Standard Specifications for Public Works Construction. The District in accordance with Public Contract Code Sect. 22300 shall permit the substitution of securities for any moneys withheld by the District. The District hereby incorporates herein all of the provisions set forth in Public Contract Code Sect. 22300.

Resolutions of Claims - When a Public Works claim is made to the District, the District will conduct a

reasonable review of the claim and, within 45 days, provide the claimant with a written statement identifying what portion of the claim is disputed and what portion is undisputed, and both parties shall work to resolve the claim as by Public Contract Code 9204. Said Code Sections shall apply for the purpose of filing claims and civil actions for claims as defined in Section 20104 of the Public Contract Code.

Counterparts - This Agreement may be executed in counterparts, a complete set of which shall be deemed an original and one single document. Signatures may be transmitted via facsimile or electronic transmission and are deemed given as of the date of transmittal.

This document shall become a valid contract only when accepted by Contractor, and subsequently by District, and together with the Contractor's Proposal shall constitute the entire agreement between the parties.



**engineered
systems**

ACCO ENGINEERED SYSTEMS | 2201 Park Place, Suite #400 | El Segundo, CA 90245

Camarillo Grove Park

Septic Tank Replacment

6968 E Camarillo Springs Rd,

Camarillo, CA 93012

May 31, 2022

RE: Camarillo Grove Park
6968 E Camarillo Springs Rd,
Camarillo, CA 93012

 **engineered
systems**
Mechanical Services
818 / 730-5845 Cell
2201 Park Place
Suite # 400
EI Segundo, CA 90245

May 31, 2022

Mr. Nick Marienthal

Park Supervisor | Pleasant Valley Recreation & Park District
Email: www.pvrpd.org
Phone: (805) 482-5396 ext. 304

Subject: Camarillo Grove Park – Septic Tank Replacement

ACCO is pleased to propose the following scope of work to furnish and install the new septic tank along with installing new outlet and vent piping.

MECHANICAL SCOPE OF WORK

1. Check in with facilities onsite
2. Perform hand detailing on-site for final piping lengths and required fittings
3. Furnish and install new 1200 gallon septic tank.
4. Run new waste line from shack to new Septic Tank system.
5. Install outlet pipe with new sample chamber.
6. Infill old leach field with engineered soils/ gravel /etc (may require new Percolation test)
7. Lay new leach field piping and new distribution chamber --approx 180' of perforated piping
8. Export bad/ left over spoils
9. Infill with approved fill
10. Once complete, ACCO will check, test and verify operations

Mechanical Clarifications:

1. Work to be completed **during normal hours**
2. **Once permit is obtained, ACCO to provide a supplemental for the cost of the permit.**

Site Clarifications:

1. District to take ownership and responsibility for the following:
 - a. new grass/landscaping/
 - b. protection of existing oak tree roots
 - c. Trimming of existing trees
 - d. percolation test if city/county mandates

PRICING: _____ \$per eziQC

Proposal Terms:

This proposal is valid for 30 days unless otherwise indicated. Thank you for this opportunity to quote this project and we look forward to working with you. Should you have any questions or require additional information, please call.

Respectfully,

ACCO Engineered Systems

Andy Lufkin
Senior Project Manager
(818) 730-5845

Manuel Felix
Service Sales Engineer
(424) 394-8559

Jose Robles
Service Sales Engineer
(949) 302-7384

Contractor's Price Proposal - Summary

Date: June 01, 2022

Re: IQC Master Contract #: CA-R8-SS01-123021-AES
Work Order #: 106072.00
Owner PO #:
Title: Camarillo Grove Park - Septic Tank Replacement
Contractor: ACCO Engineered Systems
Proposal Value: \$72,605.21

Section - 01	\$38,571.95
Section - 03	\$64.23
Section - 05	\$834.17
Section - 06	\$289.63
Section - 22	\$18,248.88
Section - 23	\$3,655.01
Section - 31	\$2,832.17
Section - 32	\$212.26
Section - 33	\$7,896.91
Proposal Total	\$72,605.21

This total represents the correct total for the proposal. Any discrepancy between line totals, sub-totals and the proposal total is due to rounding.

Contractor's Price Proposal - Detail

Date: June 01, 2022

Re: IQC Master Contract #: CA-R8-SS01-123021-AES
 Work Order #: 106072.00
 Owner PO #:
 Title: Camarillo Grove Park - Septic Tank Replacement
 Contractor: ACCO Engineered Systems
 Proposal Value: \$72,605.21

Sect.	Item	Mod.	UOM	Description	Line Total																
Labor	Equip.	Material	(Excludes)																		
Section - 01																					
1	01 22 16 00 0002		EA	Reimbursable Fees Reimbursable Fees will be paid to the contractor for eligible costs as directed by Owner. Insert the appropriate quantity to adjust the base cost to the actual Reimbursable Fee. If there are multiple Reimbursable Fees, list each one separately and add a comment in the "note" block to identify the Reimbursable Fee (e.g. sidewalk closure, road cut, various permits, extended warranty, expedited shipping costs, etc.). A copy of each receipt shall be submitted with the Price Proposal.	\$1,562.94																
				<table> <tr> <td>Installation</td> <td>Quantity</td> <td></td> <td>Unit Price</td> <td></td> <td>Factor</td> <td>=</td> <td>Total</td> </tr> <tr> <td></td> <td>1,420.85</td> <td>x</td> <td>1.00</td> <td>x</td> <td>1.1000</td> <td>=</td> <td>1,562.94</td> </tr> </table>	Installation	Quantity		Unit Price		Factor	=	Total		1,420.85	x	1.00	x	1.1000	=	1,562.94	
Installation	Quantity		Unit Price		Factor	=	Total														
	1,420.85	x	1.00	x	1.1000	=	1,562.94														
				PAYMENT AND PERFORMANCE BONDS PER SOURCEWELL AGREEMENT 2% OF \$71,042.27 = \$1,420.85																	
2	01 22 20 00 0092		HR	Maintenance Plumber With Truck And Tools This task will be used specifically for maintenance service calls.	\$6,912.19																
				<table> <tr> <td>Installation</td> <td>Quantity</td> <td></td> <td>Unit Price</td> <td></td> <td>Factor</td> <td>=</td> <td>Total</td> </tr> <tr> <td></td> <td>32.00</td> <td>x</td> <td>166.80</td> <td>x</td> <td>1.2950</td> <td>=</td> <td>6,912.19</td> </tr> </table>	Installation	Quantity		Unit Price		Factor	=	Total		32.00	x	166.80	x	1.2950	=	6,912.19	
Installation	Quantity		Unit Price		Factor	=	Total														
	32.00	x	166.80	x	1.2950	=	6,912.19														
				Tracing and location of leach fields 2 techs 8 hours 2 days to verify location and layout.																	
3	01 22 23 00 0348		WK	5/8 CY Hydraulic Excavator With Full-Time Operator	\$14,988.90																
				<table> <tr> <td>Installation</td> <td>Quantity</td> <td></td> <td>Unit Price</td> <td></td> <td>Factor</td> <td>=</td> <td>Total</td> </tr> <tr> <td></td> <td>2.00</td> <td>x</td> <td>5,787.22</td> <td>x</td> <td>1.2950</td> <td>=</td> <td>14,988.90</td> </tr> </table>	Installation	Quantity		Unit Price		Factor	=	Total		2.00	x	5,787.22	x	1.2950	=	14,988.90	
Installation	Quantity		Unit Price		Factor	=	Total														
	2.00	x	5,787.22	x	1.2950	=	14,988.90														
				Hydraulic Excavator is used for excavation and demolition purposes.																	
4	01 22 23 00 0401		DAY	48" Compaction Wheel Attachment For Hydraulic Excavators	\$690.21																
				<table> <tr> <td>Installation</td> <td>Quantity</td> <td></td> <td>Unit Price</td> <td></td> <td>Factor</td> <td>=</td> <td>Total</td> </tr> <tr> <td></td> <td>2.00</td> <td>x</td> <td>266.49</td> <td>x</td> <td>1.2950</td> <td>=</td> <td>690.21</td> </tr> </table>	Installation	Quantity		Unit Price		Factor	=	Total		2.00	x	266.49	x	1.2950	=	690.21	
Installation	Quantity		Unit Price		Factor	=	Total														
	2.00	x	266.49	x	1.2950	=	690.21														
				Compaction wheel for soil compaction.																	
5	01 22 23 00 1425		DAY	18 CY Rear Dump Truck With Full-Time Truck Driver	\$13,120.55																
				<table> <tr> <td>Installation</td> <td>Quantity</td> <td></td> <td>Unit Price</td> <td></td> <td>Factor</td> <td>=</td> <td>Total</td> </tr> <tr> <td></td> <td>5.00</td> <td>x</td> <td>2,026.34</td> <td>x</td> <td>1.2950</td> <td>=</td> <td>13,120.55</td> </tr> </table>	Installation	Quantity		Unit Price		Factor	=	Total		5.00	x	2,026.34	x	1.2950	=	13,120.55	
Installation	Quantity		Unit Price		Factor	=	Total														
	5.00	x	2,026.34	x	1.2950	=	13,120.55														
				Truck will be used over the course of 5 days to export the following:																	
				Debris																	
				Dirt																	
				Rock																	
				Septic Tank																	
				Damaged Pipe																	
				Site Clean Up																	

Contractor's Price Proposal - Detail Continues..

Work Order Number: 106072.00
 Work Order Title: Camarillo Grove Park - Septic Tank Replacement

Section - 01						
6	01 71 13 00 0004	EA	First 25 Miles, Equipment Delivery, Pickup, Mobilization And Demobilization Using A Tractor Trailer With Up To 53' Bed Includes loading, tie-down of equipment, delivery of equipment, off loading on site, rigging, dismantling, loading for return and transporting away. For equipment such as bulldozers, motor scrapers, hydraulic excavators, gradalls, road graders, loader-backhoes, heavy duty construction loaders, tractors, pavers, rollers, bridge finishers, straight mast construction forklifts, telescoping boom rough terrain construction forklifts, telescoping and articulating boom man lifts with >40' boom lengths, etc.			\$1,210.33
		Installation	Quantity	Unit Price	Factor	Total
			1.00	934.62	1.2950	1,210.33
			x	x	=	
		Equipment mobilization, backhoe and gradall				
7	01 74 19 00 0040	CYM	Hauling On Paved Roads, First 15 Miles			\$51.86
		Installation	Quantity	Unit Price	Factor	Total
			45.00	0.89	1.2950	51.86
			x	x	=	
		Hauling of the debris/dirt				
8	01 74 19 00 0041	CYM	Hauling On Paved Roads, Miles Over Initial 15 Miles			\$34.97
		Installation	Quantity	Unit Price	Factor	Total
			45.00	0.60	1.2950	34.97
			x	x	=	
		Hauling of the debris/dirt				
Subtotal for Section - 01						\$38,571.95
Section - 03						
9	03 21 11 00 0241	EA	3/8" Diameter x 24" Long, Deformed Straight Dowel			\$64.23
		Installation	Quantity	Unit Price	Factor	Total
			20.00	2.48	1.2950	64.23
			x	x	=	
		New straight dowel for septic tank piping system.				
Subtotal for Section - 03						\$64.23
Section - 05						
10	05 43 00 00 0015	LF	1-5/8" Wide x 13/16" High, 14 Gauge, 316 Stainless Steel Unistrut Channel			\$834.17
		Installation	Quantity	Unit Price	Factor	Total
			15.00	41.41	1.2950	804.39
			x	x	=	
		Demolition	Quantity	Unit Price	Factor	Total
			10.00	2.30	1.2950	29.79
			x	x	=	
		Unistrut channel used for new septic tank system.				
Subtotal for Section - 05						\$834.17
Section - 06						
11	06 05 23 00 0143	EA	3/8" Diameter x 6" Length, Hot Dipped Galvanized Steel, Hex Lag Bolt			\$289.63
		Installation	Quantity	Unit Price	Factor	Total
			15.00	14.91	1.2950	289.63
			x	x	=	
		Lag bolts used for septic tank piping system.				
Subtotal for Section - 06						\$289.63
Section - 22						
12	22 05 76 00 0011	EA	4" Heavy Duty Floor Cleanout, Round Top, Cast Iron With Cast Bronze Screw Plug And Nickel Bronze Cover			\$1,312.56
		Installation	Quantity	Unit Price	Factor	Total
			1.00	931.41	1.2950	1,206.18
			x	x	=	
		Demolition	Quantity	Unit Price	Factor	Total
			1.00	82.15	1.2950	106.38
			x	x	=	
		New cleanouts for septic tank piping system.				

Contractor's Price Proposal - Detail Continues..

Work Order Number: 106072.00

Work Order Title: Camarillo Grove Park - Septic Tank Replacement

Section - 22

13	22 11 16 00 0923	LF	4" Schedule 80 Chlorinated Polyvinyl Chloride (CPVC) Pressure Pipe				\$10,430.45
			Quantity	Unit Price	Factor	Total	
		Installation	160.00 x	46.56 x	1.2950 =	9,647.23	
		Demolition	160.00 x	3.78 x	1.2950 =	783.22	
		New 4" Chlorinated PVC piping for septic tank piping system.					
14	22 11 16 00 0935	EA	4" Schedule 80 Chlorinated Polyvinyl Chloride (CPVC) 90 Degree Elbow				\$627.97
			Quantity	Unit Price	Factor	Total	
		Installation	2.00 x	213.64 x	1.2950 =	553.33	
		Demolition	2.00 x	28.82 x	1.2950 =	74.64	
		New PVC piping 90 degree elbow fitting for septic tank piping system.					
15	22 13 16 00 0273	LF	4" No Hub Cast Iron Pipe				\$4,789.04
			Quantity	Unit Price	Factor	Total	
		Installation	90.00 x	29.74 x	1.2950 =	3,466.20	
		Demolition	90.00 x	11.35 x	1.2950 =	1,322.84	
		New 4" no hub piping for septic tank piping system.					
16	22 13 16 00 0470	EA	4" No Hub Coupling				\$24.79
			Quantity	Unit Price	Factor	Total	
		Installation	1.00 x	19.14 x	1.2950 =	24.79	
		New 4" no hub coupling for septic tank piping system.					
17	22 13 16 00 0492	EA	Cut And Prepare 4" Cast Iron Pipe, No Hub				\$158.40
			Quantity	Unit Price	Factor	Total	
		Installation	8.00 x	15.29 x	1.2950 =	158.40	
		No Hub cast iron pipe used for new septic tank system.					
18	22 13 16 00 0551	EA	4" Polyvinyl Chloride (PVC) DWV 1/8 Bends				\$135.29
			Quantity	Unit Price	Factor	Total	
		Installation	1.00 x	73.21 x	1.2950 =	94.81	
		Demolition	1.00 x	31.26 x	1.2950 =	40.48	
		New 4" PVC 1/8 bends for septic tank piping system.					
19	22 13 16 00 0551	EA	4" Polyvinyl Chloride (PVC) DWV 1/8 Bends				\$541.15
			Quantity	Unit Price	Factor	Total	
		Installation	4.00 x	73.21 x	1.2950 =	379.23	
		Demolition	4.00 x	31.26 x	1.2950 =	161.93	
		New 4" PVC 1/8 bends for septic tank piping system.					
20	22 13 16 00 0610	EA	4" Polyvinyl Chloride (PVC) DWV Wyes				\$229.23
			Quantity	Unit Price	Factor	Total	
		Installation	1.00 x	130.08 x	1.2950 =	168.45	
		Demolition	1.00 x	46.93 x	1.2950 =	60.77	
		New 4" PVC wyes for septic tank piping system.					

Subtotal for Section - 22

\$18,248.88

Section - 23

21	23 21 13 23 2233	LF	4" Schedule 40 Polyvinyl Chloride (PVC) Pressure Pipe				\$3,655.01
			Quantity	Unit Price	Factor	Total	
		Installation	90.00 x	21.27 x	1.2950 =	2,479.02	
		Demolition	90.00 x	10.09 x	1.2950 =	1,175.99	
		New 4" PVC piping for septic tank piping system.					

Subtotal for Section - 23

\$3,655.01

Section - 31

Contractor's Price Proposal - Detail Continues..

Work Order Number: 106072.00
 Work Order Title: Camarillo Grove Park - Septic Tank Replacement

Section - 31										
22	31	05	16	00	0014	CY	#9 Stone Aggregate Fill (3/32" To 3/16")			\$2,832.17
						Installation	Quantity	Unit Price	Factor	Total
							45.00	48.60	1.2950	2,832.17
							x	x	=	
Approx.45 yards of crushed rock (for leach field and bedding for sept tank)										
Subtotal for Section - 31										\$2,832.17
Section - 32										
23	32	84	23	00	0108	EA	10" Round Irrigation Valve Box With Lid (Rain Bird® VB-10RND)			\$212.26
						Installation	Quantity	Unit Price	Factor	Total
							1.00	119.42	1.2950	154.65
							x	x	=	
						Demolition	Quantity	Unit Price	Factor	Total
							1.00	44.49	1.2950	57.61
							x	x	=	
Valve box used for outdoor protection for septic tank system.										
Subtotal for Section - 32										\$212.26
Section - 33										
24	33	14	13	23	0247	EA	4" 90 Degree Elbow, AWWA C900/905, DR 18, PC 235 Polyvinyl Chloride (PVC)			\$520.56
						Installation	Quantity	Unit Price	Factor	Total
							2.00	189.76	1.2950	491.48
							x	x	=	
						Demolition	Quantity	Unit Price	Factor	Total
							2.00	11.23	1.2950	29.09
							x	x	=	
New 4" PVC elbows for septic tank piping system.										
25	33	31	11	00	0112	EA	4" Polyvinyl Chloride (PVC) Cleanout Tees With Plug, Sewer And Drain			\$616.48
						Installation	Quantity	Unit Price	Factor	Total
							1.00	374.73	1.2950	485.28
							x	x	=	
						Demolition	Quantity	Unit Price	Factor	Total
							1.00	101.32	1.2950	131.21
							x	x	=	
New 4" PVC cleanouts for septic tank piping system.										
26	33	34	13	13	0003	EA	1,250 Gallon Precast Septic Tank			\$6,206.79
						Installation	Quantity	Unit Price	Factor	Total
							1.00	4,086.90	1.2950	5,292.54
							x	x	=	
						Demolition	Quantity	Unit Price	Factor	Total
							1.00	705.99	1.2950	914.26
							x	x	=	
(1) new fiberglass septic tank.										
27	33	34	53	13	0003	EA	5 Outlet Concrete Distribution Box			\$553.08
						Installation	Quantity	Unit Price	Factor	Total
							1.00	347.23	1.2950	449.66
							x	x	=	
						Demolition	Quantity	Unit Price	Factor	Total
							1.00	79.86	1.2950	103.42
							x	x	=	
Distribution box used to divide the effluent flow from a septic tank.										
Subtotal for Section - 33										\$7,896.91
Proposal Total										\$72,605.21

This total represents the correct total for the proposal. Any discrepancy between line totals, sub-totals and the proposal total is due to rounding.

**PLEASANT VALLEY RECREATION AND PARK DISTRICT
STAFF REPORT / AGENDA REPORT**

TO: BOARD OF DIRECTORS

FROM: MARY OTTEN, GENERAL MANAGER
By: Brandon Lopez, Park Supervisor

DATE: July 6, 2022

**SUBJECT: CONSIDERATION AND APPROVAL OF THE DESIGNS
OF TURF REMOVAL SITES**

SUMMARY

Due to the recent drought conditions and water restrictions, the District has identified six parks for the removal of passive use areas of turf. Staff has created turf replacement designs using a variety of plants and materials. Staff will take immediate action, prioritizing projects based on staff capacity and budget.

BACKGROUND

On April 26th, 2022, Metropolitan Water conducted a public hearing where they adopted a resolution declaring a water shortage emergency. During May 2022 meetings, the City of Camarillo and Camarosa Water District both voted to reduce outdoor watering to one day per week. District staff held several discussions with the City of Camarillo and Camarosa Water District. The agencies agreed that it would be in the best interest for the District to reduce water throughout District parks by 30%, rather than limiting water to one day per week. In an effort to meet the 30% reduction goal, staff has identified six parks where turf can be removed to reduce water consumption.

The District started turf removal projects FY 2021/2022. Two of the turf removal projects were completed; one at Pitts Ranch Park and one at Arneill Ranch Park for a total of 75,000 square feet. Both projects were completed in accordance with *Be Water Wise*. The District is slated to receive more than \$150,000 in rebates from completion of these two projects.

During the May 2022 budget workshop, staff identified six parks in which turf could be replaced with drought tolerant landscape for a total of 235,000 sq ft.

ANALYSIS

As part of the 2021-2026 Strategic Plan, the District has committed to green initiatives to encourage a more efficient design and usage of our park system. The turf removal projects incorporate best practices in the design of District park space and the selection of materials to reduce environmental impacts and promote drought-tolerant landscapes.

Staff has identified six parks where passive use turf areas can be removed. Each site has been carefully designed with functionality, drought tolerance, and maintenance in mind. At each site where turf is being removed, there should be little impact to programming and active use. The

main goal is to minimize and, in some places, eliminate water waste. Staff is looking at a long-term approach to turf removal by creating an esthetically pleasing landscape that does not greatly increase maintenance. Staff is proposing the District remove about 235,000 sq ft of turf throughout the six parks. The removal of turf in these areas will have little impact to the use of these parks. Staff has estimated that the District will save around 3,770 HCF (2,800,000 gallons) of water per year, by eliminating turf throughout these parks.

Staff will take a phased approach to removing turf at these parks. The first phase will focus on Valle Lindo, Lokker, Bob Kildee, and the Community Center Parks.

Park	Sq. Ft.	HCFs Saved
Valle Lindo	68,000	1090
Lokker	75,000	1200
Bob Kildee	12,000	190
Community Center	20,000	320
Total	175,000	2800

Each area of turf will be replaced with a variety of materials. In most areas staff will use a combination of woodchips and decomposed granite. Select areas will be planted with walkable ground cover and there will be drought tolerant plants throughout the landscape. Staff will redesign and install the irrigation to each area and use a combination of low flow spray nozzles, drip irrigation, and subterranean irrigation to eliminate runoff and evaporation.

The District will continue to work closely with grant and rebate agencies to maximize these opportunities as long as funding is available. *Be Water Wise* has recently increased their turf removal rebate from \$2 per square foot to \$3 per square foot for public agencies. Staff took advantage of this increase for the current project at Bob Kildee to bring the total rebate for this project to more than \$30,000. *Be Water Wise* requires there to be at least 3 plants for every 100 sq. ft. as well as mulch, decomposed granite, or a permeable alternative.

FISCAL IMPACT

There is no fiscal impact at this time.

STRATEGIC PLAN COMPLIANCE

Meets 2021 Strategic Plan Goal 1.4: Create Green initiatives and sustainability program to encourage more efficient design and usage of our park system, respect of our natural environments, and to capitalize on the cost of savings of these methods as well as grant opportunities.

- A. Strategy: Incorporate best practices in the design of parks and selection of plant materials to reduce environmental impacts and promote drought-tolerant, resilient landscapes.

RECOMMENDATION

It is recommended the Board approve the proposed turf removal designs for Valle Lindo, Lokker, Bob Kildee, and the Community Center Parks.

ATTACHMENTS

- 1) Valle Lindo Design (1 page)
- 2) Lokker Design (1 page)
- 3) Bob Kildee Design (1 page)
- 4) Community Center Design (1 page)







Pleasant Valley Aquatic Center

The Snack Shack



9. ORAL COMMUNICATION - INFORMATIONAL ITEMS, which do not require action but relate to District business, will be reported by members of the Board and staff as follows:

- A. Chair Kelley
- B. Ventura County Special District Association/California Special District Association
- C. Ventura County Consolidated Oversight Board
- D. Santa Monica Mountains Conservancy
- E. Standing Committees – Finance, Liaison, Long Range Planning, Personnel and Policy
- F. Ad Hoc Committees – City of Camarillo Liaison, Miracle League, Pickleball/Tennis
- G. Foundation for Pleasant Valley Recreation and Parks
- H. General Manager’s Report
- I. Board Members