

In compliance with the Americans with Disabilities Act, if you need special assistance in this meeting, please contact the District Secretary at (951) 699-1630. Notification 72-hours prior to the meeting will generally enable District staff to make reasonable arrangements to ensure accessibility. (28 CFR 35.102.35.104 ADA Title II)

MINUTES
April 20, 2023 @ 8:00 a.m.
REGULAR BOARD MEETING
TEMECULA PUBLIC CEMETERY DISTRICT
41911 C St, Temecula, Ca 92592
951-699-1630

1. **CALL TO ORDER:** Trustee Davis-8:00 am

2. **FLAG SALUTE :** Trustee Davis- 8 :01 am

3. **ROLL CALL:**-8:03 am

Chair- Davis, Vice Chair- Dugan, Trustee Qualm,
Trustee Vanderhaak, Trustee Kelleher, General Manager, Beaudet,
Administration, Santos

4. **MOTIONS TO EXCUSE:** None

5. **VISITORS:** None

6 PUBLIC COMMENTS:

At this time, members of the public are invited to address the Board concerning any items on the agenda, or on any other matters that are not on the agenda but are within the subject matter jurisdiction of the district. Request must be submitted in writing or in person prior to the start of the meeting. Every person will be allowed 5 minutes to address the Board of Trustees; in accordance with State Law (Brown Act) all items to be acted on must be posted 72 hours in advance.

7.CONSENT CALENDAR: A motion was made by Trustee Dugan to accept the consent calendar as presented, seconded by Trustee Vanderhaak and passed with a 5/0 vote.

All matters listed under Consent Calendar are considered routine and may all be approved by one motion. There will be no discussion of these items unless members of the Board or the public may request an item be removed from the Consent Calendar for separate action. A total of five minutes is provided for members of the public to address the Trustees on items that appear on the consent calendar. Unless otherwise specified in the request to remove an item from the Consent Calendar, all items shall be considered immediately following action on the remaining items on the Consent Calendar.

A. APPROVAL OF MINUTES

Recommendation: That the Board approve the minutes of the Regular Board Meeting of March 16, 2023

B. APPROVAL OF CHECK REGISTERS

Recommendation: That the Board approves the March 2023 Check Register Nos. 101100, 101200 and 101300.

C. APPROVAL OF BOOKKEEPER REPORT

Recommendation: That the Board receives and files the March 2023 Bookkeeper Report

8. **ACTION ITEMS:**

- A. **RESOLUTION 2022-2023-1-** A motion was made by Trustee Kelleher to move the Endowment principal and interest from the Riverside County Controllers office over to Stifel, seconded by Trustee Dugan and passed with a 5/0 vote.

Recommendation: The Board approves the transfer of endowment funds from the county auditor controller's office to our investment firm Stifel.

Endowment Principle-\$173,618.46

Endowment Interest- \$877.12

- B. **RESOLUTION 2023-2-** A motion was made by Trustee Kelleher to move the money held in our General fund at the Riverside Auditor Controller office to our in house ACO fund, the motion was seconded by Trustee Qualm and passed with a 5/0 vote.

The Board approves the transfer of money from our General Fund 51425 held at the auditor controller office to our dedicated ACO fund 51440.

Transfer- 1,000,000.00

- C. **RESPONSE LETTER TO MRS. CAROLE PHILLIP**

9. **FINANCIAL REPORTS: A motion was made by Trustee Vanderhaak to receive and file the March financials, seconded by Trustee Qualm and passed with a 5/0 vote.**

- A. March 2023 Balance Sheet
- B. March 2023 Profit and Loss
- C. March 2023 Stifel Investments; principal and interest

10. **GENERAL MANAGERS REPORTS: RECEIVED**

- A. February 2023 Revenues
- B. February 2023 Inventory
- C. February Burial Calendar
- D. Redlines from the county -CUP03606S01
- E. Trustees to sign certificate of completion- Harassment Prevention
- F. Reports from Trustee Kelleher and Trustee Qualm from Seaside Conference

11. FISCAL YEAR 2023-2024 SUBCOMMITTEES-

- A. 52-acre Cemetery Property (**Qualm, Dugan**)
- B. Landscape Plan (**Vanderhaak, Davis**)
- C. Cenotaph/ Ossuary (**Dugan, Qualm**)
- D. Conférence Liaison (**Kelleher, Vanderhaak**)
- E. Polices (**Dugan, Kelleher**)
- F. General Price List (**Davis-Vanderhaak**)
- G. Investments (**Qualm-Dugan**)

12. ITEMS FOR FUTURE TRUSTEE AGENDAS

Any Trustee may request an item to be placed on a future agenda. Any such request will be discussed only under this section. In making the request, a Trustee may briefly describe the topic of the proposed agenda item. This description shall not exceed 5 minutes. No substantive discussion on the subject or a motion may occur.

13. GENERAL COUNSEL REPORTS: Nothing to Report

14. CLOSED SESSION ITEMS:

A. CONFERENCE WITH LEGAL COUNSEL—ANTICIPATED INITIATION OF LITIGATION

Pursuant to Government Code of Section 54956.9 (d) (**one potential case**)

B. CONFERENCE WITH LEGAL COUNSEL—ANTICIPATED LITIGATION

Significant Exposure to Litigation

Pursuant to Government Code of Section 54956.9 (d) (**one potential case**)

C. CLOSED SESSION ANNOUNCEMENT:

The Next Regular Meeting of the Temecula Public Cemetery Board of Trustees will be held on Thursday, ~~May 18, 2023~~, at 8:00 a.m. ~~May 25, 2023~~

15. ADJOURNMENT: 9:19 am

1st Motion: Vanderhaak made the motion to move the next meeting of the board to 05/25/2023

2nd Motion: Kelleher seconded the motion.

All in Favor: 5/0

Temecula Public Cemetery District

5/15/2023 10:56 AM

Register: 101100 · US Bank Checking

From 04/01/2023 through 04/30/2023

Sorted by: Date, Type, Number/Ref

Date	Number	Payee	Account	Memo	Payment	C	Deposit	Balance
04/03/2023	8775	American Mini Storage	201100 · Accounts Pay...	April	115.00	X		47,560.07
04/03/2023	8776	Asco Pacific	201100 · Accounts Pay...	4057	5,279.75	X		42,280.32
04/03/2023	8777	Complete Office	201100 · Accounts Pay...	4035920-0	39.15	X		42,241.17
04/03/2023	8778	Hank's Hardware & ...	201100 · Accounts Pay...	449504	36.93	X		42,204.24
04/03/2023	8779	Protection One (corp)	201100 · Accounts Pay...	149843031-April	228.97	X		41,975.27
04/03/2023	8780	Prudential Overall Su...	201100 · Accounts Pay...	March	337.35	X		41,637.92
04/03/2023	8781	South County Pest C...	201100 · Accounts Pay...	0282337	46.00	X		41,591.92
04/03/2023	8782	Verizon Wireless	201100 · Accounts Pay...	9559703646	218.68	X		41,373.24
04/04/2023	8783	US Bank	201100 · Accounts Pay...	March	2,692.92	X		38,680.32
04/06/2023	040623	Compass HR	201100 · Accounts Pay...	HR	225.00	X		38,455.32
04/07/2023			101200 · US Bank Pay...	Funds Transfer	11,712.69	X		26,742.63
04/08/2023	JE 21044		515100 · Life Insuranc...	Automatic with...	35.64	X		26,706.99
04/10/2023	041023	CalPers 457 Plan	201100 · Accounts Pay...	pay period 04/14	1,277.44	X		25,429.55
04/10/2023			101200 · US Bank Pay...	Funds Transfer	411.30	X		25,018.25
04/11/2023	8784	Asco Pacific	201100 · Accounts Pay...	69583	392.39	X		24,625.86
04/11/2023	8785	Brown Family Servic...	201100 · Accounts Pay...	0001873-April	300.00	X		24,325.86
04/11/2023	8786	California Associatio...	201100 · Accounts Pay...		12.00	X		24,313.86
04/11/2023	8787	CR&R Incorporated	201100 · Accounts Pay...	001-1412466	371.20	X		23,942.66
04/11/2023	8788	Craig Davis	201100 · Accounts Pay...	Conference Rei...	531.29	X		23,411.37
04/11/2023	8789	Dale Qualm.	201100 · Accounts Pay...	Seaside- CAPC...	284.39	X		23,126.98
04/11/2023	8790	EcoFert Inc	201100 · Accounts Pay...	5571 March	515.00	X		22,611.98
04/11/2023	8791	Linda Glau CPA	201100 · Accounts Pay...	April	544.50	X		22,067.48
04/11/2023	8792	Nieves Landscape Inc	201100 · Accounts Pay...	ash trees	14,440.00	X		7,627.48
04/11/2023	8793	PureRite Drinking W...	201100 · Accounts Pay...	290491-April	71.68	X		7,555.80
04/11/2023	8794	Southern California ...	201100 · Accounts Pay...	2-03-325-4707	477.14	X		7,078.66
04/11/2023	8795	Standard Insurance C...	201100 · Accounts Pay...	160-513170-00...	264.16	X		6,814.50
04/11/2023	8796	Streamline	201100 · Accounts Pay...	7235D26B-002...	50.00	X		6,764.50
04/11/2023	8797	Whited Cemetery Ser...	201100 · Accounts Pay...	IN-053514	938.00	X		5,826.50
04/11/2023	8798	Wildlife Control Ser...	201100 · Accounts Pay...	WL3543	500.00	X		5,326.50
04/11/2023	8799	Crowne Hill Consulti...	201100 · Accounts Pay...		552.46	X		4,774.04
04/12/2023			523290 · Bank Charges	Service Charge	21.00	X		4,753.04
04/13/2023			101100G · Cash - Gen...	Deposit		X	68,053.73	72,806.77
04/13/2023	8800	Agriscap	201100 · Accounts Pay...		23.93	X		72,782.84
04/13/2023	8801	The Village News	201100 · Accounts Pay...	VOID: silent a...		X		72,782.84
04/20/2023	042823	CalPers 457 Plan	201100 · Accounts Pay...	pay period 04/28	1,262.10	X		71,520.74
04/20/2023	050123	California Public Em...	201100 · Accounts Pay...	7490021932 ...	2,995.71	X		68,525.03
04/20/2023			101200 · US Bank Pay...	Funds Transfer	10,897.51	X		57,627.52
04/21/2023	8802	California Dept of Ta...	201100 · Accounts Pay...	1st QTR 2023	291.00	X		57,336.52
04/24/2023			-split-	Deposit		X	291.92	57,628.44
04/24/2023	8803	Brown Family Servic...	201100 · Accounts Pay...	0001876-April	375.00	X		57,253.44

Temecula Public Cemetery District

5/15/2023 10:56 AM

Register: 101100 · US Bank Checking

From 04/01/2023 through 04/30/2023

Sorted by: Date, Type, Number/Ref

Date	Number	Payee	Account	Memo	Payment	C	Deposit	Balance
04/24/2023	8804	County of Riverside I...	201100 · Accounts Pay...	IT 5573-MAR...	210.54			57,042.90
04/24/2023	8805	Dale Qualm.	201100 · Accounts Pay...	Seaside- CAPC...	10.70	X		57,032.20
04/24/2023	8806	Home Depot Credit S...	201100 · Accounts Pay...	3512239-April	168.05			56,864.15
04/24/2023	8807	RJM Design Group I...	201100 · Accounts Pay...	#35646-April	2,426.25	X		54,437.90
04/24/2023	8808	Sun City Granite	201100 · Accounts Pay...	engraving-259...	320.00			54,117.90
04/24/2023	8809	Verizon Wireless	201100 · Accounts Pay...	95-75890695	215.26			53,902.64
04/24/2023	8810	County of Riverside ...	201100 · Accounts Pay...	CAPC 03/23/23	291.92			53,610.72
04/24/2023	8811	Law Offices Of Quin...	201100 · Accounts Pay...	1857-JANUARY	3,685.00			49,925.72
04/24/2023	041123	Downs Energy	201100 · Accounts Pay...	CL-83949-AP...	254.75	X		49,670.97

Temecula Public Cemetery District

5/15/2023 10:57 AM

Register: 101200 · US Bank Payroll
 From 04/01/2023 through 04/30/2023
 Sorted by: Date, Type, Number/Ref

Date	Number	Payee	Account	Memo	Payment	C	Deposit	Balance
04/07/2023			101100 · US Bank Che...	Funds Transfer		X	11,712.69	14,419.28
04/10/2023			101100 · US Bank Che...	Funds Transfer		X	411.30	14,830.58
04/14/2023	JE 21045		510040 · Regular Salar...	Bank Draft Am...	8,173.85	X		6,656.73
04/14/2023	JE 21045		510040 · Regular Salar...	Bank Draft Am...	3,401.49	X		3,255.24
04/14/2023	JE 21045		510040 · Regular Salar...	Monthly charg...	137.35	X		3,117.89
04/20/2023			513130 · CA SUI	Deposit		X	260.84	3,378.73
04/20/2023			101100 · US Bank Che...	Funds Transfer		X	10,897.51	14,276.24
04/28/2023	JE 21046		510040 · Regular Salar...	Bank Draft Am...	7,559.73	X		6,716.51
04/28/2023	JE 21046		510040 · Regular Salar...	Bank Draft Am...	3,215.43	X		3,501.08
04/28/2023	JE 21046		510040 · Regular Salar...	Monthly charg...	122.35	X		3,378.73

Temecula Public Cemetery District

5/15/2023 10:57 AM

Register: 101300 · US Wash Account

From 04/01/2023 through 04/30/2023

Sorted by: Date, Type, Number/Ref

Date	Number	Payee	Account	Memo	Payment	C	Deposit	Balance
04/25/2023	5050	Judy Moreno	777030 · Marker Setting		600.00			7,532.56
04/28/2023			-split-	Deposit		X	28,450.00	35,982.56
04/28/2023	5051	County of Riverside ...	-split-	April Revenues	27,850.00			8,132.56



SPECIAL DISTRICT RISK MANAGEMENT AUTHORITY

2023 BOARD OF DIRECTORS ELECTION

OFFICIAL ELECTION BALLOT ATTACHED

This is an official election packet that contains items that require ACTION by your Agency's governing body for the selection of up to three (3) candidates to the SDRMA Board of Directors.

ELECTION PACKET ENCLOSURES

- Election Ballot Instructions
- Official Election Ballot (Action Required)
- Candidate's Statements of Qualifications (4)



SDRMA'S BOARD OF DIRECTORS ELECTION BALLOT INSTRUCTIONS

Notification of nominations for three (3) seats on the Special District Risk Management Authority's (SDRMA's) Board of Directors was mailed to the membership in January 2023.

On May 11, 2023, SDRMA's Election Committee reviewed the nomination documents submitted by the candidates in accordance with SDRMA's Policy No. 2022-06 Establishing Guidelines for Director Elections. The Election Committee confirmed that (4) candidates met the qualification requirements, and those names are included on the Official Election Ballot.

The Official Election Ballot along with a Statement of Qualifications as submitted by each candidate is posted to the SDRMA MemberPlus portal along with these instructions. Election instructions are as follows:

1. The Official Election Ballot must be used to ensure the integrity of the balloting process.
2. Print a copy of this ballot, then select up to three (3) candidates. Your agency's governing body must approve the Official Election Ballot at a public meeting. **Ballots containing more than four (4) candidate selections will be considered invalid and not counted.**
3. The signed Official Election Ballot **MUST** be sealed and received by mail or hand delivery at SDRMA's office on or before 4:30 p.m. on Tuesday, August 8, 2023 to the address below. Faxes or electronic transmissions are NOT acceptable.
Special District Risk Management Authority
Election Committee
1112 "I" Street, Suite 300
Sacramento, California 95814
4. The four-year terms for newly elected Directors will begin on January 1, 2024, and terminate on December 31, 2027.
5. Important balloting and election dates are:
 - **August 8, 2023: Deadline for members to return the signed Official Election Ballot.**
 - **August 9-11, 2023:** Ballots are opened and counted.
 - **August 10-11, 2023:** Election results are announced, and candidates notified.
 - **November 1-2, 2023:** Newly elected Directors are invited to attend SDRMA board meeting (Sacramento).
 - **January 2024:** Newly elected Directors are seated, and Board officer elections are held.

Please do not hesitate to contact SDRMA's Management Analyst Candice Richardson at crichardson@sdrma.org or 800-537-7790 if you have any questions regarding the election and balloting process.

**Special District Risk Management Authority
Board of Directors
Candidate's Statement of Qualifications**

This information will be distributed to the membership with the ballot, "exactly as submitted" by the candidates – no attachments will be accepted. No statements are endorsed by SDRMA.

Candidate* Bob Swan
District/Agency Groveland Community Services District (GCSD)
Work Address P.O. Box 350, Groveland CA 95321
Work Phone (209) 962-7131 Cell Phone (408) 398-4731

*The name or nickname and any designations (i.e. CPA, SDA, etc.) you enter here will be printed on the official ballot, exactly as submitted.

Why do you want to serve on the SDRMA Board of Directors? (Response Required)

I have been a member of the SDRMA Board for two terms. I would like to be elected to a third term because:

1. As a board member of Groveland CSD, I am very aware of the great value that smaller districts get from their membership in SDRMA, and I'd like to continue to support the Authority's great member services.
2. While the organization continues to operate well, thanks to its experienced and motivated staff, we are once again going through a period of management change. I believe that Board continuity is particularly important at such a time.
3. The California re-insurance market continues to be challenging. I believe that my eight years of board experience will be helpful as we negotiate the potentially tricky economic future.
4. Personally, I feel that we have a very well-functioning and collegial Board, and I find it both challenging and enjoyable to be part of it.

What Board or committee experience do you have that would help you to be an effective Board Member? (SDRMA or any other organization) (Response Required)

1. SDRMA Board: Member since 2016, presently Vice President. I am our representative on the CSDA Legislative Committee (and a member in my own right), and on the Alliance Executive Council.
2. Groveland CSD Board: Member since appointment in June 2013. I was Board President 2014-2018.
3. Member of Board of Southside Community Connections, which is a 501(c)(3) nonprofit in Groveland that provides transportation, educational, social and recreational services to seniors and differently-abled folks in the Groveland area. I was on this Board from 2018 through 2022, mostly as Treasurer.
4. Board Member (Treasurer) of Pine Cone Performers, a local community choral and acting group, since 2010.

**Special District Risk Management Authority
Board of Directors
Candidate's Statement of Qualifications**

What special skills, talents, or experience (including volunteer experience) do you have? (Response Required)

Background: BS Physics, MS Computer Science. 3 years in USAF. 30 years in the semiconductor industry as engineer, engineering manager, business unit director.

Skills, etc.: Very familiar with financial reports and cost accounting. Working knowledge of computer and communications technology. In my work life, I managed geographically distributed organizations with up to 150 technical personnel and up to \$120 million in annual sales. I'm pretty good at helping groups work together to achieve consensus (or, failing that, acceptable compromise).

In recent years, most of my volunteer work has been in driving folks (who can't drive themselves) to medical appointments, shopping, and the like. This is one of the services of Southside Community Connections.

I'm also a pretty decent choral singer, but that's not relevant to this application.

What is your overall vision for SDRMA? (Response Required)

Our vision statement is "To be the exemplary public agency risk pool of choice for California special districts and other public agencies". To achieve this vision, I believe we must focus on:

(1) maintaining long-term financial stability, by ensuring that there is a fair allocation of cost versus risk across the membership, continuously evaluating the appropriate level of risk retention, and using creative ideas like our "captive" reinsurance agency to enhance our cash position.

(2) continue to expand our risk management training and assistance services. We have made significant improvements in this area by bring it internal to the Authority.

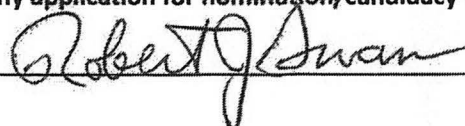
(3) continue to emphasize services to our core membership: small to mid-sized districts with limited options for insurance.

(4) ensure that SDRMA remains a desirable workplace, and maintain our highly-qualified and responsive staff.

Above all, remember that this is an insurance pool, owned by its member agencies, and maintain an overarching focus on member service and support. Make certain that we will be here for our members.

I certify that I meet the candidate qualifications as outlined in the SDRMA election policy. I further certify that I am willing to serve as a director on SDRMA's Board of Directors. I will commit the time and effort necessary to serve. Please consider my application for nomination/candidacy to the Board of Directors.

Candidate Signature



Date

4/11/2023

**Special District Risk Management Authority
Board of Directors
Candidate's Statement of Qualifications**

This information will be distributed to the membership with the ballot, "exactly as submitted" by the candidates – **no attachments will be accepted**. No statements are endorsed by SDRMA.

Candidate* ACQUANETTA WARREN
District/Agency Local Agency Formation Commission (LAFCO) for San Bernardino County
Work Address 1170 W. Third Street, Unit 150, San Bernardino, CA 92415-0490
Work Phone (909)388-0480 Home Phone

*The name or nickname and any designations (i.e. CPA, SDA, etc.) you enter here will be printed on the official ballot, exactly as submitted.

Why do you want to serve on the SDRMA Board of Directors? (Response Required)

As a City Mayor I have been fortunate to serve on regional boards that include special district representation: San Bernardino Countywide Oversight Board and Southern California Water Coalition's Board of Trustees. I realize that special districts, especially the smaller districts, are not included in the conversation for a variety of matters. Currently, I serve on San Bernardino LAFCO and the California Association of LAFCOs, which do have robust special district representation. I believe that my skills, experience, and understanding can contribute to SDRMA. Specifically, I want to contribute by developing programs that would help member agencies maximize their protection and minimize their risks.

What Board or committee experience do you have that would help you to be an effective Board Member? (SDRMA or any other organization) (Response Required)

I currently serve as mayor for the City of Fontana. This is my fourth term, and my focus has been bolstering economic development, creating educational opportunities, improving public safety, and advocating for a healthier community. As mayor, I have been fortunate to serve on:

- San Bernardino LAFCO since 2014, serving currently as Vice Chair of the Commission. I am also a Board Member of the statewide organization of LAFCOs, CALAFCO, serving as Treasurer
- San Bernardino County Transportation Authority: Board of Directors, General Policy Committee, and Transit Committee
- San Bernardino County Racial Equity Committee for the San Bernardino Council of Governments
- San Bernardino Countywide Oversight Board

In addition, I am the current Chair for the Southern California Water Coalition's Board of Trustees as well as Co-Chair of its Task Force for Water Equity, Access, and Affordability.

**Special District Risk Management Authority
Board of Directors
Candidate's Statement of Qualifications**

**What special skills, talents, or experience (including volunteer experience) do you have?
(Response Required)**

Aside from being Mayor for the City of Fontana, I am currently the District Director for the Second Supervisorial District for San Bernardino County and I coordinate district services and communications with constituents, I oversee community outreach efforts, as well as supervise district staff.

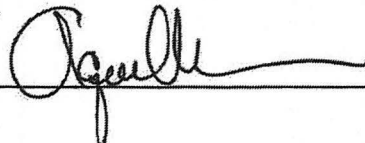
In addition to local-level involvement, I have served on the State Park Commission and as a trustee of the United States Conference of Mayors, an official non-partisan organization of cities in the United States with populations of 30,000 or more. I have also served in community organizations such as Water/Recycled Water Projects and Development Processing for New Communities, Casa Colina Rehabilitation Hospital Board of Directors, and the Upland YMCA Board of Directors.

What is your overall vision for SDRMA? (Response Required)

My vision for SDRMA is to ensure that it continues to be the best risk management agency, who will continue to listen and communicate with its member agencies. I would strive to make sure SDRMA continues to provide excellent service, provide educational and training programs that are beneficial to its member agencies, and offer more resources that add value to its members. Lastly, I want to make sure SDRMA operates in the highest ethical manner with complete transparency.

I certify that I meet the candidate qualifications as outlined in the SDRMA election policy. I further certify that I am willing to serve as a director on SDRMA's Board of Directors. I will commit the time and effort necessary to serve. Please consider my application for nomination/candidacy to the Board of Directors.

Candidate Signature _____



Date _____

4/25/2023

**Special District Risk Management Authority
Board of Directors
Candidate's Statement of Qualifications**

This information will be distributed to the membership with the ballot, "exactly as submitted" by the candidates – no attachments will be accepted. No statements are endorsed by SDRMA.

Candidate* Jesse D. Claypool
District/Agency Honey Lake Valley Resource Conservation District
Work Address USDA Service Center 170 Russell Avenue, Suite C, Susanville, CA 96130
Work Phone 530-257-7271 Cell Phone 530-310-0232

*The name or nickname and any designations (i.e. CPA, SDA, etc.) you enter here will be printed on the official ballot, exactly as submitted.

Why do you want to serve on the SDRMA Board of Directors? (Response Required)

My interest for being on the SDRMA Board of Directors is because I believe it is imperative for there to be a knowledgeable and experienced voice on the Board with the perspective of the small to mid-size special district. In addition, I am eager to continue working with SDRMA staff and fellow Board members, providing relevant and affordable solutions, available to all special districts.

What Board or committee experience do you have that would help you to be an effective Board Member? (SDRMA or any other organization) (Response Required)

The vast amount of understanding and experience that I've gained as a current member of the SDRMA Board of Directors will undoubtedly aid as I continually strive to be an increasingly effective member of the SDRMA Board of Directors going forward.

In addition to being a current SDRMA Board member, I am currently Chairman of the Board for the Honey Lake Valley Resource Conversation District and a board member of a Regional Water Management Group. Previously I have served on the following, Lassen County's Civil Grand Jury, two terms, CSDA Professional Development committee, two terms, Janesville Union School District trustee, Technical Advisory Committee for the prevention of violence against schools K-12, two terms, and CSDA Member Services committee, two terms.

**Special District Risk Management Authority
Board of Directors
Candidate's Statement of Qualifications**

What special skills, talents, or experience (including volunteer experience) do you have? (Response Required)

I have attended various board member trainings and completed leadership and governance classes, including the following; CSDA's Extraordinary Leadership Training and CSDA's Special District Leadership Academy.

I have received CSDA's Recognition in Special District Governance certificate and successfully completed Executive Education in Public Policy at University of Southern California, Sol Price School of Public Policy.

What is your overall vision for SDRMA? (Response Required)

My continued vision for SDRMA is to be effective within the communities they serve. With focused attention to affordable solutions, administered by a team of highly dedicated professional staff, SDRMA will continue to be an industry leader providing affordable solutions to its members.

I certify that I meet the candidate qualifications as outlined in the SDRMA election policy. I further certify that I am willing to serve as a director on SDRMA's Board of Directors. I will commit the time and effort necessary to serve. Please consider my application for nomination/candidacy to the Board of Directors.

Candidate Signature 

Date 4/20/2023

**Special District Risk Management Authority
Board of Directors
Candidate's Statement of Qualifications**

This information will be distributed to the membership with the ballot, "exactly as submitted" by the candidates – no attachments will be accepted. No statements are endorsed by SDRMA.

Candidate* Sandy Seifert-Raffelson
District/Agency Herlong Public Utility District
Work Address P O Box 115, Herlong CA 96113
Work Phone (530)827-3150 Cell Phone (530)310-4320

*The name or nickname and any designations (i.e. CPA, SDA, etc.) you enter here will be printed on the official ballot, exactly as submitted.

Why do you want to serve on the SDRMA Board of Directors? (Response Required)

I am a current Board member of SDRMA and feel that I have added my financial and general manager background to make a better-informed decision for SDRMA members. As a Board member, I continue to Improve my education of insurance issues and look forward to representing small District's and Northern California as a voice on the SDRMA Board. I feel I am an asset to the Board with my degree in Business and my 35 plus years' experience in accounting and special districts.

I understand the challenges that small District face every day when it comes to managing liability insurance, worker's compensation and health insurance for a few employees with limited revenue and staff. My experience in small districts give me an appreciation of the importance of risk management services and programs, especially for smaller District that lack expertise within. I feel I am an asset to this Board, and would love a chance to stay on 4 more years!

What Board or committee experience do you have that would help you to be an effective Board Member? (SDRMA or any other organization) (Response Required)

While serving on the SDRMA Board, I have been privilege to be Secretary of the Board, Vice-President and currently President. I have served on CSDA's Audit and Financial committee's for several year. I have served on the SDLF Board and current President; Northeastern Rual Health Clinic Board; Fair Board; School and Church boards; 4-H Council and leader for 18 years; and UC Davis Equine Board. In the past 30 years, I have learn that there is no "I" in Board and it can be very rewarding to part of a team that makes a difference for others.

As part of my many duties working for Herlong PUD, I worked to form the District and was directly involved with LAFCo, Lassen County Board of Supervisors and County Clerk to establish the initial Board of Directors and first policies for HPUD. I have administered the financial portion of 2 large capital improvement projects with USDA as well as worked on the first ever successful water utility privatization project with the US Army and department of Defense. I am currently in the middle of a 14 million infrastructure project with SRF monies. I am also the primary administrator of two federal contract for utility services.

**Special District Risk Management Authority
Board of Directors
Candidate's Statement of Qualifications**

What special skills, talents, or experience (including volunteer experience) do you have? (Response Required)

I have my Bachelor's Degree in Business with a minor in Sociology. I have audit small districts and worked for a small district for almost 18 years. I am a good communicator and organizer. I have served on several Boards and feel I work well within groups or special committee. I am willing to go that extra mile to see things get completed.

~~I believe in recognition for jobs well done. I encourage incentive programs that get members motivated to participate and strive to do their very best to keep all losses at a minimum and reward those with no losses.~~

~~With HPUD and with SDRMA both boards and employees have worked hard to receive their District of Distinction and their District of Transparency.~~

~~I feel I am a good leader with people skills that can accomplish what is necessary to keep a District or JPA moving forward.~~

What is your overall vision for SDRMA? (Response Required)

SDRMA Staff and Board work together to bring Special Districts affordable insurance for the pool they serve. By

~~listening to the needs of all California Special Districts and meeting those needs at a reasonable price that Special Districts can afford. I would continue advocating for these continued efforts and rewarding continue education for all Districts and employees.~~

~~I see SDRMA pool continuing for centuries and serving those needs.~~

I certify that I meet the candidate qualifications as outlined in the SDRMA election policy. I further certify that I am willing to serve as a director on SDRMA's Board of Directors. I will commit the time and effort necessary to serve. Please consider my application for nomination/candidacy to the Board of Directors.

Candidate Signature *Fancy Jeffrey Raffelson* Date 4/17/2023

Temecula Public Cemetery District
Balance Sheet
As of April 30, 2023

	Apr 30, 23	Apr 30, 22	\$ Change
ASSETS			
Current Assets			
Checking/Savings			
101100 · US Bank Checking	49,670.97	68,748.69	
101200 · US Bank Payroll	3,378.73	2,847.76	
101300 · US Wash Account	8,132.56	8,494.38	
101100C · Cash -Accumulative Outlay Fund	405,640.66	2,591,240.60	
101100E · Cash - Endowment Fund	10,146.13	124,906.42	
1011004 · Cash - Retirement	180.00	180.00	
101100G · Cash - General	2,829,267.87	1,279,626.55	
Total Checking/Savings	3,306,416.92	4,076,044.40	-769,627.48
Other Current Assets			
102200 · Stifel Investments			
102210 · Stifel Endowment Care	2,522,494.97	2,374,005.97	
102220 · Stifel Endowment Interest	922,027.31	861,357.50	
Total 102200 · Stifel Investments	3,444,522.28	3,235,363.47	209,158.81
112011 · Inventory Asset	155,569.00	169,818.00	
102100 · Taxes Receivable	0.00	10,677.30	
116100 · Interest Receivable			
116100P · Interest Receivable - End Prin	11,779.18	11,818.63	
116100I · Interest Receivable - End Int	5,594.50	5,113.67	
Total 116100 · Interest Receivable	17,373.68	16,932.30	
117000 · PrePaid Expenses	9,522.39	8,086.75	
Total Other Current Assets	3,626,987.35	3,440,877.82	186,109.53
Total Current Assets	6,933,404.27	7,516,922.22	-583,517.95
Fixed Assets			
191650 · Intangible Assets	24,470.00	24,470.00	
198950 · Accum Depr - Software	-4,893.99	-3,262.66	
191000 · Future Cemetery Property	3,468,296.98	3,172,346.68	
191100 · Buildings and Improvements	318,605.07	318,605.07	
191400 · Structures and Improvements	363,678.03	363,678.03	
191500 · Equipment	188,672.05	188,322.08	
191700 · Non-Depreciable Assets	77,561.02	77,561.02	
191800 · Grounds Improvements	22,079.50	22,079.50	
191900 · Paving 2015	143,560.00	143,560.00	
198100 · Accumulated Depreciation - Bldg	-166,004.34	-147,187.18	
198400 · Accumulated Depr - Struct/Imp	-255,214.97	-237,860.30	
198500 · Accum Depr - Equipment	-163,194.07	-159,171.68	
198800 · Accum Depr- Grnd Imp	-5,473.71	-4,236.84	
198900 · Accum Depr-Pav 15	-51,238.02	-44,060.02	
Total Fixed Assets	3,960,903.55	3,714,843.70	246,059.85
TOTAL ASSETS	10,894,307.82	11,231,765.92	-337,458.10

Temecula Public Cemetery District
Balance Sheet
As of April 30, 2023

	Apr 30, 23	Apr 30, 22	\$ Change
LIABILITIES & EQUITY			
Liabilities			
Current Liabilities			
Accounts Payable			
201100 · Accounts Payable	7,304.71	5,438.08	
Total Accounts Payable	7,304.71	5,438.08	
Other Current Liabilities			
212200 · Accrued Vacation Pay	14,771.16	19,085.14	
Total Other Current Liabilities	14,771.16	19,085.14	
Total Current Liabilities	22,075.87	24,523.22	
Total Liabilities	22,075.87	24,523.22	-2,447.35
Equity			
36001 · Net Investments in Cap Assets	3,309,357.00	3,322,836.00	
36002 · Endowment Care Corpus	2,635,110.00	2,454,556.00	
36003 · Endowment Care Earnings	821,514.00	807,065.00	
36004 · Unrestricted Earnings ACO Fund	2,930,348.00	1,874,732.00	
36005 · Unrestricted Earnings Gen Fund	882,307.00	882,307.00	
308100 · General Reserve	3,634.00	198,834.00	
325100G · Unreserved Fund Balance - Gen	280,455.17	657,426.04	
390000 · Retained Earnings	512,942.98	634,295.13	
Net Income	-503,436.20	375,191.53	
Total Equity	10,872,231.95	11,207,242.70	-335,010.75
TOTAL LIABILITIES & EQUITY	10,894,307.82	11,231,765.92	-337,458.10

Temecula Public Cemetery District Profit & Loss Budget Performance April 2023

Jul '22 - Apr 23 Annual Budget

Ordinary Income/Expense

Income

700001 · Property Taxes

700020 · Prop Tax Current Secured	457,490.00	696,200.00
701020 · Prop Tax Current Unsecured	32,029.44	25,000.00
703000 · Prop Tax Prior Unsecured	547.33	0.00
704000 · Prop Tax Curr Supplemental	15,315.77	9,600.00
705000 · Prop Tax Prior Supplemental	7,527.84	4,500.00
706000 · Teeter Settlement	8,500.69	10,000.00
707000 · RDV Apportionment	53,312.78	40,000.00
752800 · CA-Homeowners Tax Relief	3,024.31	4,000.00
770100 · Property Tax - SBE	7,321.57	10,500.00
770102 · Other Taxes	0.00	200.00

Total 700001 · Property Taxes 585,069.73 800,000.00

740020 · Interest and Dividend Income

740024 · Dividend Income - Stifel	8,563.05	5,000.00
740023 · Interest - Stifel	61,975.66	68,900.00
740020G · Interest on General Fnd at Cnty	16,846.68	5,000.00
740020E · Interest on Endow Fnd at County	1,734.55	100.00
740020O · Interest on ACO at County	22,285.88	10,000.00

Total 740020 · Interest and Dividend Income 111,405.82 89,000.00

770001 · Other Revenue

777700 · Non-Resident Fee Income	33,000.00	0.00
770100E · Endowment	54,102.00	145,000.00
777030 · Marker Setting	14,750.00	18,000.00
777031 · Niche Engraving	2,230.00	3,000.00
777040 · Open, Close Fees	41,800.00	37,000.00
777520 · Sale of Lots	58,998.00	56,800.00
777530 · Cremation	36,900.00	17,000.00
777600 · Cenotaph	0.00	300.00
777650 · Graveside Service	23,800.00	16,000.00
780160 · Vaults, Flower Vases, etc.	20,318.69	16,000.00
781360 · Other Misc. Revenue	1,469.40	400.00

Total 770001 · Other Revenue 287,368.09 309,500.00

Total Income 983,843.64 1,198,500.00

Gross Profit 983,843.64 1,198,500.00

Temecula Public Cemetery District Profit & Loss Budget Performance April 2023

	<u>Jul '22 - Apr 23</u>	<u>Annual Budget</u>
Expense		
510000 · Salaries and Employee Benefits		
510040T · Regular Salaries.		
510040 · Regular Salaries	226,207.76	319,000.00
510330 · Incentive Pay	6,454.25	6,500.00
510335 · Hazard Pay	0.00	0.00
515100 · Life Insurance Policy	356.40	450.00
Total 510040T · Regular Salaries.	233,018.41	325,950.00
510320T · Temporary Salaries.		
510320 · Temporary Salaries	40.00	0.00
510320T · Temporary Salaries. - Other	0.00	0.00
Total 510320T · Temporary Salaries.	40.00	0.00
513000T · Retirement - Miscellaneous		
518000 · Employer Contributions-457	14,210.85	23,500.00
551000 · Employee Contributions	0.00	0.00
Total 513000T · Retirement - Miscellaneous	14,210.85	23,500.00
513120T · Retirement - Social Security		
513120 · Social Security	14,731.94	21,500.00
513140 · Medicare Tax	3,445.53	5,000.00
Total 513120T · Retirement - Social Security	18,177.47	26,500.00
515080T · Health Insurance (eer share)		
515081 · Health Insurance	30,219.01	52,000.00
515082 · Vision Insurance	322.64	800.00
515083 · Dental Insurance	2,650.60	3,200.00
Total 515080T · Health Insurance (eer share)	33,192.25	56,000.00
515260T · Unemployment Insurance		
517000 · Workers Comp Insurance	12,926.97	22,000.00
515060 · State Unemployment Ins EDD	0.00	1,500.00
513130 · CA SUI	693.86	2,000.00
515260T · Unemployment Insurance - Other	0.00	0.00
Total 515260T · Unemployment Insurance	13,620.83	25,500.00
Total 510000 · Salaries and Employee Benefits	312,259.81	457,450.00
520000 · Services and Supplies		
529540T · Utilities		
520845 · Trash	3,630.57	4,400.00
529500 · Electricity	5,260.69	6,000.00
Total 529540T · Utilities	8,891.26	10,400.00

Temecula Public Cemetery District Profit & Loss Budget Performance April 2023

	Jul '22 - Apr 23	Annual Budget
524520T · Administrative Expenses		
518160 · Board Stipend	4,950.00	11,250.00
520115 · Uniforms - Replacement Clothing	3,359.72	3,600.00
520230 · Cellular Phone	1,933.36	3,300.00
520705 · Food	86.90	1,200.00
520930 · Insurance - Liability	17,061.50	20,500.00
523100 · Memberships	3,495.00	3,600.00
523290 · Bank Charges	199.00	300.00
523621 · Subscriptions	0.00	500.00
523660 · Computer Service	7,073.17	7,000.00
523700 · Office Supplies	0.00	1,000.00
523720 · Photocopies	2,439.98	3,000.00
523760 · Postage/Mailing	275.00	1,000.00
523840 · Computer Equip/Software/T1	4,437.85	2,500.00
524520 · County Journal Recording	1,688.63	2,400.00
524530 · Storage Fees	1,160.00	1,400.00
524540 · Payroll Processing Services	3,463.25	4,100.00
524560 · Auditing	10,500.00	10,500.00
524561 · Accounting	8,159.75	9,500.00
524566 · Temp for e-File	0.00	9,000.00
524800 · Drug Testing/Pre-Employment	425.00	400.00
525025 · Legal - General Counsel	4,345.00	30,000.00
525030 · Compass HR Support	5,487.64	5,400.00
526420 · Advertising	275.50	1,800.00
527280 · Awards/Recognition	0.00	300.00
527880 · Training/ Staff	250.00	2,500.00
528140 · Conferences and Meetings	15,755.11	30,000.00
528980 · Meals	801.17	2,000.00
528990 · Semi-Annual Team Dinner	2,666.28	5,000.00
529040 · Private Mileage Reimbursement	1,081.40	2,500.00
529050 · Website	450.00	800.00
529550 · Water	729.41	1,600.00
Total 524520T · Administrative Expenses	102,549.62	177,950.00

Temecula Public Cemetery District Profit & Loss Budget Performance April 2023

	Jul '22 - Apr 23	Annual Budget
524500T · Operational Expenses.		
521420 · Maint-Field Equipment	6,468.77	15,000.00
522310 · Maint-Building Improvements	0.00	2,500.00
522320 · Maint - Grounds	14,864.85	18,000.00
522360 · Maintenance-Extermination	5,230.00	6,800.00
523250 · Repurchase	0.00	2,650.00
523800 · Engraving Expense	2,387.00	3,000.00
525320 · Security Guard Services	0.00	400.00
525600 · Security	2,289.70	7,500.00
527100 · Fuel	2,568.43	4,800.00
527180 · Operational Supplies	15,062.40	13,000.00
528020 · Inventory	14,307.67	8,500.00
Total 524500T · Operational Expenses.	63,178.82	82,150.00
Total 520000 · Services and Supplies	174,619.70	270,500.00
530000 · Other Charges		
530100 · Miscellaneous non-operating exp	204.45	4,000.00
Total 530000 · Other Charges	204.45	4,000.00
540000 · Capital Assets		
542060T · Cemetery Grounds		
542040 · - Buildings, Capital Projects	12,176.75	100,000.00
542060 · Improvements -Building	0.00	6,000.00
542065 · Tree Renovaton	16,540.00	7,500.00
548300 · Office Renovation	0.00	6,000.00
Total 542060T · Cemetery Grounds	28,716.75	119,500.00
540040T · Land, Purchase of Land		
540042 · Future Cemetery Property	940,144.03	1,600,000.00
Total 540040T · Land, Purchase of Land	940,144.03	1,600,000.00
546020T · Equipment, etc		
542070 · Well Motor	0.00	60,000.00
546020 · Equipment - Automotive	0.00	17,000.00
546240 · Mapping Software	2,040.00	6,000.00
Total 546020T · Equipment, etc	2,040.00	83,000.00
Total 540000 · Capital Assets	970,900.78	1,802,500.00
551100G · Contrib to Other Funds - Gen	0.00	145,100.00
551100E · Contrib to Other Funds - Endow	0.00	321,450.00
551100C · Cont from Other Funds - ACO	0.00	-1,802,500.00
Total Expense	1,457,984.74	1,198,500.00
Net Ordinary Income	-474,141.10	0.00

Temecula Public Cemetery District
Profit & Loss Budget Performance
 April 2023

	Jul '22 - Apr 23	Annual Budget
Other Income/Expense		
Other Income		
731000 · Realized Gain (Loss) on Invest	1,755.89	0.00
731100 · Unrealized Gain (Loss) on Invst	-31,050.99	0.00
Total Other Income	-29,295.10	0.00
Net Other Income	-29,295.10	0.00
Net Income	-503,436.20	0.00



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CARB Passes ZEV Mandate on Local Agency Medium-Duty and Heavy-Duty Fleets



By Kristin Withrow posted 20 hours ago

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Last week, CARB approved its Advanced Clean Fleet (ACF) regulation which will require local government medium and heavy-duty fleets to begin transition to zero emission vehicles (ZEVs) as soon as January 1, 2024. CARB passed the regulation unanimously, as amended to include amendments read by CARB Executive Officer Steven Cliff as well as a reference to CalOSHA as a stakeholder for implementation. CSDA testified in opposition, citing timeline, cost, infrastructure, and emergency response concerns.

In addition to providing public testimony, CSDA partnered with CalCities and the California State Association of Counties on joint comment letter, met with CARB staff, organized several virtual roundtables with CSDA members and CARB board members to share local examples of implementation concerns, and spoke with reporters covering the issue, gaining coverage in CalMatters and the Sacramento Bee. However, following many hours of testimony, CARB approved the regulation and corresponding resolution.

SB 1383 and 2025 “Check-In” Added to CARB Resolution in Response to Sanitation Agency Concerns

In response to concerns from sanitation agencies, CARB added a section to the end of its April 27 adopted resolution making reference to SB 1383 (Lara, 2016). In addition, CARB added a “report-back” in 2025 on progress that would include any other actions that are necessary that the board or others

might need to take to achieve the regulation's goals. Executive Officer Steven Cliff read into the record the following amendment to the final paragraph:

“Be it further resolved that, consistent with the latest Scoping Plan, the Board recognizes that the successful implementation of the food waste diversion requirements and methane emissions reductions mandated by SB 1383 are critical to the State's climate goals. The Board further recognizes that multiple reliable uses for non-fossil biomethane will be needed for successful implementation. The Board recognizes the need for coordination meetings with other state agencies such as CEC, CPUC, State Water Resources Control Board, CalRecycle, CDFA, CNRA, and other relevant stakeholders such as the California Association of Sanitation Agencies and the California Air Pollution Control Officers Association, to implement SB 1383 and SB 1440.54 As such, the Board directs staff to prioritize policy discussions related to SB 1383 and SB 1440 implementation and discussions on how to transition biomethane into hard to decarbonize sectors, or as a feedstock to produce hydrogen for FCEV fuel and to produce electricity to charge BEVs to achieve the SB 1383 target. The board further directs staff to report to the board by the end of 2025 on progress for alternative uses of biomethane, including identifying any appropriate regulatory actions as needed.

CARB Staff Outlines Added and Amended Exemptions and Extensions

Over the course of the regulation drafting process, CARB established a number of noteworthy exemptions and extensions to the ACF. However, CARB ultimately retained its fundamental implementation timeline requiring 50 percent of all newly purchased medium-duty and heavy-duty vehicles to be ZEV starting January 1, 2024 and 100 percent starting January 1, 2027.

The CARB board and staff detailed several exemption options and pathways for compliance in the regulation as part of their meeting presentation.

New Flexibilities Highlighted by CARB

State and Local Government Fleets: A number of changes were made to provide more flexibility for State and Local Government, including:

- **ZEV Milestone Phase-In Option:** State and local governments are now able to use the optional ZEV milestone phase-in option that provides flexibility for fleets to prioritize the phase-in of ZEVs based on suitability.
- **Fleets of 10 or less:** Divisions that have 10 or fewer vehicles, or agencies that are in certain designated counties will remain exempt from the ZEV purchase requirement until 2027.

- **Near Zero-Emission Vehicles (NZEVs):** State and local government fleets may now count NZEVs the same as ZEVs, for the purposes of determining compliance, until 2035. An NZEV is defined as a plug-in hybrid vehicle with a minimum all-electric range.

Waste and Wastewater Fleets Provisions: This provision provides more time for certain vehicles in waste and wastewater fleets who are implementing organic waste diversion programs and exclusively fueling eligible vehicles with biomethane. This provision would defer ZEV requirements until 2030 for eligible fleets who elect to comply with the ZEV Milestone option.

Accident/Non-Repairable Vehicle Provision: This provision allows for the purchase of another used internal combustion engine (ICE) vehicle with the same or newer model year engine as the vehicle that was rendered non-repairable due to a one-time event like a fire or accident without affecting the compliance date associated with the vehicle that was deemed to be non-repairable.

Intermittent Snow Removal Vehicle Exemption: In the original proposal, dedicated snow removal vehicles were already exempt from the ACF regulation. This provision would provide a temporary exemption for intermittent snow removal vehicles to exclude them from the ZEV requirements until 2030. Intermittent snow removal vehicles are trucks that operate as a snowplow part of the year and other uses when there is no snow to plow.

Transit Fleet Exemption: This provision temporarily excludes transit agencies subject to the Innovative Clean Transit regulation until 2030. This provides more time before ZEV purchases begin for their maintenance and support vehicles allowing them to focus their efforts on electrifying their transit buses first.

Updated Flexibilities Highlighted by CARB

ZEV Purchase Exemption: This provision allows fleets to delay adding certain vehicles to the fleet if they are not yet available and would now include two options to use the exemption.

- The existing proposal would require that CARB maintain a list of what vehicles can be purchased as an ICE vehicle if ZEVs are not available to purchase in given configuration type. Fleet owners would not need to apply for an exemption for vehicles on the list and would report the purchase when the vehicle is received.
- Fleet-specific exemption. In addition to vehicles on the list, a fleet owner may apply for an exemption if the ZEV cannot be configured to meet the primary intended function the fleet owner needs. For example, this would cover cases where the fleet needs a truck upfit with a bucket truck body with 100 ft. of reach and ZEVs are only available in a configuration with a 50 ft. reach.

CARB will verify no manufacturers can produce and sell the configuration and shall issue the exemption within 45 days.

- Fleet protections. Additional modifications were made include more fleet owner protections when assessing what ZEV configurations as considered to be available. For example, a newly added requirement for a ZEV to be considered available is that it will have to meet the Zero-Emission Powertrain certification requirements, it cannot be a demonstration vehicle, and it must be available to purchase within the next two model years.
- Exemption coverage. This exemption was also expanded to apply to all vehicle weight classes instead of just heavier trucks. This exemption does not apply to drayage trucks because there are multiple tractor models are already available.

Daily Usage Exemption: This provision allows fleet owners to apply for an exemption to purchase an ICE vehicle if ZEVs are available in a given configuration, but do not meet the fleet's daily mileage and stationary operational use needs.

- Miles and operations. Fleet owners would need to submit information to CARB about the daily mileage (or usage) of existing vehicles in the fleet to show that available ZEV could not be placed in the fleet to meet daily needs based on miles and hours of operation in a 30-day period within the prior year. Fleets with mutual aid agreements would also be able to use data from the prior 5 years.
- The provision was also expanded to give fleet owners the ability to use operational data to compare with fleets that operate ZEVs in a similar application and by shortening the time period fleets would need to collect vehicle data to support a fleet's exemption request.

Infrastructure Delay: This provision allows fleet owners to receive an extension if the installation of infrastructure at their site was delayed for reasons outside of their control and they took steps to start the project one-year ahead of the next compliance date. The provision was expanded in several ways to address construction delays and utility delays.

- Construction delays. Unexpected delays after construction started would qualify for an extension for up to two years instead of one and would include delays associated with ZEV infrastructure equipment (e.g., charger and hydrogen dispensing equipment).
- Utility delays. Site electrification delays by the utility could be used to support extensions for an initial 3-year period and an additional 2-year extension based on the utilities ability to provide sufficient power to the site and based on how many ZEVs can be supported each year.

Mutual Aid Exemption: Fleets that have mutual aid agreements (e.g., public fleets and utilities) would be able to purchase ICE vehicles for up to 25 percent of their fleet. Access to this option was improved by reducing the ZEV threshold before a fleet owner could claim the exemption to purchase ICE vehicles and the provision was expanded to allow for ICE vehicle purchases in all vehicle weight classes. The ZEV threshold was reduced from 75 percent ZEVs to a phased in threshold where fleet owners would become eligible if exceeding 25 percent ZEVs until 2032, 50 percent until 2035, and 75 percent thereafter.

CSDA will be working with CARB to get the most up to date information on the implementation. Please see [CARBs fact sheet](#), and visit the [CARBs website](#) for more information.

CARB has also planned a webinar on May 9, 2023 which you can sign up for here.

CSDA will share more as it becomes available. Please reach out to Heidi Hannaman if you have any questions at heidih@csda.net.

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CALIFORNIA CLASS



Hi Cindy,

My apologies for the late reply... I've been back out in the field for the last couple days.

We just finished calculating the Seepage Pit testing results. Both the Leach Line and Seepage Pit testing results "passed," however; both are on the County margin of failing.

The Leach Line testing is sitting at 60 min/inch (maximum per County - and previously 30 min/inch), and the Seepage Pit testing is sitting at 1.1 gal./sq.ft sidewall/day (maximum per County - and previously 1.7 gal./sq.ft sidewall/day).

In a nut-shell, the Leach Line area basically doubles, so we'll need to re-design the Leach Line area. We still need to calculate the linear feet of Seepage Pit required, but with the lower rate we'll need more linear feet of Seepage Pit wall to make it work... We'll get the required leach field areas over to the Team ASAP, so we can start working on the re-design of the Leach Line area. The Seepage Pits will still fit into designated areas...

Respectfully,

Todd A. Greer
Vice President, CEG 2377

Todd,

Thanks for your feedback on this.

Too bad about some of the results – but it sounds like we still have a heartbeat.

We'll be on the lookout for your estimate of the expanded leach field limits to address the new readings.

Thanks again Todd, enjoy the evening,

craig

Craig Sensenbach, LLA, ISA

Principal, Landscape Architect



STIFEL PRESTIGE® ACCOUNT STATEMENT

1 1 1 D377211 SSNO001003

**TEMECULA PUBLIC CEMETERY
DIST ENDOWMENT INTEREST
41911 C ST
TEMECULA CA 92592-3053**

Your Financial Advisor (LU04):
SANDRA HEDSTROM WHEELER
Telephone: (805) 783-2921

Office Serving Your Account:
4460 BROAD STREET
SUITE 210
SAN LUIS OBISPO, CA 93401

**PRIMARY INVESTMENT OBJECTIVE: Income
RISK TOLERANCE: Moderate**

For a full definition of this objective and risk tolerance, including the use of margin, please see www.stifel.com, IMPORTANT DISCLOSURES, or contact your Financial Advisor. If you have any questions concerning your investment objective or risk tolerance, or wish to make a change, please contact your Financial Advisor or the Branch Manager for this office.

**TRADING TAX LOT RELIEF METHOD: First In, First Out
INVESTOR UPDATE**

If you're switching jobs or preparing to retire, have you thought about what to do with the money you've saved in your employer-sponsored retirement plan? Your Stifel Financial Advisor can help you weigh your options so you can choose the one that's right for your goals.

ACCOUNT PROTECTION

Stifel, Nicolaus & Company, Incorporated provides up to \$150 million of coverage for securities held in client accounts, of which \$1.15 million may be in cash deposits. Ask your Financial Advisor for more details.

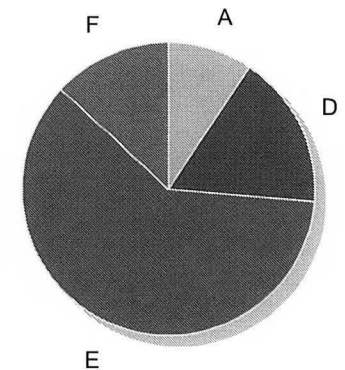
Thank you for allowing Stifel to serve you. In order to protect your rights, including rights under the Securities Investor Protection Act (SIPA), please promptly report, in writing, any inaccuracies or discrepancies in this account or statement to the Compliance Department of Stifel at the address below. If you have any questions regarding your account or this statement, please contact your Financial Advisor or the Branch Manager for this office. For additional information regarding your Stifel account, please refer to the current Stifel Account Agreement and Disclosure Booklet, which is available at www.stifel.com/disclosures/account-agreement.

PORTFOLIO SUMMARY	April 30	March 31
Net Cash Equivalents **	86,475.08	23,508.04
Net Portfolio Assets held at Stifel	834,675.11	884,671.59
Net Portfolio Assets not held at Stifel		
Net Portfolio Value	\$921,150.19	\$908,179.63
YOUR CHANGE IN PORTFOLIO VALUE	April 30	March 31
Net Cash Flow (Inflows/Outflows) ²	8,132.42	2,959.72
Securities Transferred In/Out		
Income and Distributions	3,182.99	1,934.05
Change in Securities Value	1,655.15	9,438.95
Net Change in Portfolio Value	\$12,970.56	\$14,332.72

** See the Stifel Insured Bank Deposit Program Disclosure Statements for additional information.
² Does not include cost or proceeds for buy or sell transactions.
You have securities maturing and/or options expiring.

YOUR ASSET SUMMARY

	Value on April 30, 2023 (\$)	Percentage of your account
A Net Cash Equivalents**	86,475.08	9.39%
D Fixed Income-Muni	156,278.95	16.97%
E Fixed Income-Other	557,374.45	60.51%
F Mutual Funds	121,021.71	13.14%
Total Assets	\$921,150.19	100.00%





STIFEL PRESTIGE® ACCOUNT STATEMENT

1 1 1 D377210 SSNO001003

**TEMECULA PUBLIC CEMETERY
DIST ENDOWMENT PRINCIPAL
41911 C ST
TEMECULA CA 92592-3053**

Your Financial Advisor (LU04):
SANDRA HEDSTROM WHEELER
Telephone: (805) 783-2921

Office Serving Your Account:
4460 BROAD STREET
SUITE 210
SAN LUIS OBISPO, CA 93401

PRIMARY INVESTMENT OBJECTIVE: Income
RISK TOLERANCE: Moderate

For a full definition of this objective and risk tolerance, including the use of margin, please see www.stifel.com, IMPORTANT DISCLOSURES, or contact your Financial Advisor. If you have any questions concerning your investment objective or risk tolerance, or wish to make a change, please contact your Financial Advisor or the Branch Manager for this office.

TRADING TAX LOT RELIEF METHOD: First In, First Out
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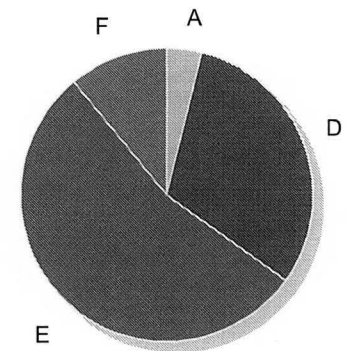
Thank you for allowing Stifel to serve you. In order to protect your rights, including rights under the Securities Investor Protection Act (SIPA), please promptly report, in writing, any inaccuracies or discrepancies in this account or statement to the Compliance Department of Stifel at the address below. If you have any questions regarding your account or this statement, please contact your Financial Advisor or the Branch Manager for this office. For additional information regarding your Stifel account, please refer to the current Stifel Account Agreement and Disclosure Booklet, which is available at www.stifel.com/disclosures/account-agreement.

PORTFOLIO SUMMARY	April 30	March 31
Net Cash Equivalents **	90,951.57	123,375.37
Net Portfolio Assets held at Stifel	2,257,924.94	2,222,679.84
Net Portfolio Assets not held at Stifel		
Net Portfolio Value	\$2,348,876.51	\$2,346,055.21
YOUR CHANGE IN PORTFOLIO VALUE	April 30	March 31
Net Cash Flow (Inflows/Outflows) ²	-8,132.42	-2,959.72
Securities Transferred In/Out		
Income and Distributions	6,445.46	5,987.42
Change in Securities Value	4,508.26	21,140.27
Net Change in Portfolio Value	\$2,821.30	\$24,167.97

** See the Stifel Insured Bank Deposit Program Disclosure Statements for additional information.
² Does not include cost or proceeds for buy or sell transactions.
You have securities maturing and/or options expiring.

YOUR ASSET SUMMARY

	Value on April 30, 2023 (\$)	Percentage of your account
A Net Cash Equivalents**	90,951.57	3.87%
D Fixed Income-Muni	729,207.40	31.04%
E Fixed Income-Other	1,270,470.05	54.09%
F Mutual Funds	258,247.49	10.99%
Total Assets	\$2,348,876.51	100.00%



A1 Monthly Revenues
July 2022-June 2023

<u>FYE 06/30/23</u>	<u>July</u>	<u>August</u>	<u>September</u>	<u>October</u>	<u>November</u>	<u>December</u>	<u>January</u>	<u>February</u>	<u>March</u>	<u>April</u>
Single	-	-	-	-	-	3,200.00	9,600.00	3,200.00	6,400.00	3,200.00
Single End	-	-	-	-	-	1,000.00	3,000.00	1,000.00	2,000.00	1,000.00
Single/Dual	0	0	3000	0	-	9000	0	0	0	0
S/D End	-	-	1,000.00	-	-	3,000.00	-	-	-	-
Dual	4,000.00	-	-	-	5,100.00	-	5,100.00	2,000.00	-	5,100.00
Dual End	2,000.00	-	-	-	1,000.00	-	1,000.00	1,000.00	-	1,000.00
Collum	-	1,400.00	1,400.00	2,600.00	-	2,600.00	2,700.00	-	-	-
Collum End	-	1,000.00	1,000.00	2,000.00	-	2,000.00	2,000.00	-	-	-
cenotaph	-	-	-	-	-	-	-	-	-	-
Ground Crem	-	5,500.00	1,700.00	7,200.00	1,700.00	1,700.00	1,700.00	3,400.00	3,400.00	1,200.00
G Crem End	-	3,000.00	1,000.00	4,000.00	1,000.00	1,000.00	1,000.00	2,000.00	2,000.00	1,200.00
O/C -B	2100	4000	2350	2150	2400	5700.00	5350.00	2750	4100.00	3750.00
O/C -C	-	200.00	400.00	1,000.00	1,500.00	200.00	900.00	1,000.00	1,000.00	1,500.00
Vault	440.00	472.00	592.69	504.00	252.00	870.00	870.00	580.00	1,626.00	-
Crem Vase	-	210.00	190.50	190.50	-	190.50	381.00	168.00	-	-
Grave Vase	75.00	165.00	84.00	196.00	84.00	280.00	196.00	-	196.00	168.00
Set Fee	750.00	1,550.00	1,500.00	1,250.00	1,150.00	2,000.00	1,750.00	1,500.00	2,850.00	1,500.00
Niche	-	-	-	-	-	-	-	-	-	-
Non-Res	3,000.00	6,000.00	-	3,000.00	4,500.00	3,000.00	1,500.00	4,500.00	6,000.00	3,000.00
Disinter	-	-	-	-	-	-	-	-	-	-
Graveside	1,500.00	1,800.00	1,650.00	2,200.00	2,400.00	3,500.00	4,400.00	1,500.00	3,700.00	3,100.00
Engraving	-	250.00	-	250.00	500.00	250.00	500.00	-	-	-
2nd End	-	2,400.00	1,000.00	900.00	2,000.00	-	-	1,000.00	-	2,000.00
Bench	-	700.00	400.00	1,500.00	-	-	-	-	-	-
Taxes	45.07	55.74	24.02	77.92	29.40	117.28	1485.80	65.44	67.89	14.70
Labor	774.93	1182.26	376.48	1331.58	604.6	1827.22	127.2	1126.56	1246.11	717.3
Total	14,685.00	29,885.00	17,667.69	30,350.00	24,220.00	41,435.00	43,560.00	26,790.00	34,586.00	28,450.00

Funerals at Temecula Public Cemetery

This calendar includes all funeral services scheduled. Click on any item for more information.

APRIL 2023						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29 Darell Farnbach	30	31 Gitiarfrouz Moshref	1
2	3 Elizabeth Boutsikakis	4 Harry Powalski	5 Mary Salerno	6	7 Manuel Castro	8
9	10 Bladimier Gonzalez	11	12	13	14 Louis Green	15
16	17 Yekaterina Chursina	18 Charlaine Eng Victor Eng Ricky Eng	19 Yencu Hhuynh	20	21	22
23	24 Henry Henningsen	25	26	27	28 Ratana Sy Sou	29

Hello Cindi-

Thank you for your reply.

I can confirm I have updated you single purchase limit from 5k to 10k and updated your emails address.

Thank you and have a wonderful day.

Roxane P.

How was my service today? Click [here](#) to take a short survey.

CAL-Card Client Services Team

Corporate Payment & Treasury Solutions (CPTS)
p. 1.877.846.9302, option 3 | calcard@usbank.com

U.S. Bank

U.S. Bank Plaza

200 South 6th Street, Minneapolis, MN 55402 | www.usbank.com

24/7 U.S. Bank Customer Service: 1.800.344.5696

24/7 U.S. Bank Access Online Help Desk: 1.877.452.8083

24/7 U.S. Bank Fraud Prevention: 1.800.523.9078

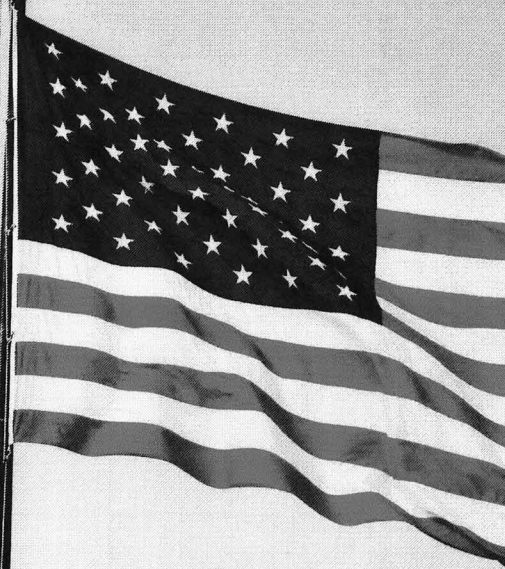
CAL-Card Program Information

TEMECULA PUBLIC CEMETERY DISTRICT

MEMORIAL DAY CEREMONY

Monday
May 29, 2023
10:00 am

Remember and Honor



Ceremony Held at
Temecula Public Cemetery District
41911 C Street, Temecula

Please join us as we pay respect to all our Veterans buried at the Temecula Cemetery

Master of Ceremony
Chairperson, Craig Davis

Presentation of Colors
Temecula Valley High Junior ROTC

Pledge of Allegiance

National Anthem
Cadet Airman, Kaitlyn Crouse
Cadet Airman, Grey Barnett
Cadet Airman, Siedah Troupe

Invocation
Chairperson, Craig Davis

Guest of Honor/Keynote Speaker
SSgt. Jessica Alexander
Council Member, City of Temecula

Knights of Columbus Padre Pio
Assembly #2247 Roll Call

The Temecula Public Cemetery District wish to extend their gratitude to all the program participants, including:

Temecula Valley High School Lt. Col. Michael P. Good, USAF (Retired)

Color Guards - Junior ROTC

Cadet Second Lieutenant, Coniyah Brandon (Right Rifleman)
Cadet Second Lieutenant, Jayla Taylor (American Flag)
Cadet Staff Sergeant, Jelena Lao (Air Force Flag)
Cadet Airman, Jupiter Garcia (POW/MIA Flag)
Cadet Second Lieutenant, Kayla Johnson (Left Rifleman)

Boy Scouts of America, California Inland Empire Council, Troop 301
Troop Scoutmaster, Nicholas Sullin, Assistant Scoutmaster, Edward Ramsey

Temecula Public Cemetery District Trustees
Chairman, Craig Davis, Vice Chairman, Mike Dugan
Trustee, Rosie Vanderhaak, Trustee, Dale Qualm
Trustee, Patricia Kelleher

Cemetery Staff
General Manager, Cindi Beaudet
Administrative Assistant, Cherry Santos
Groundskeeper, Kyle Means, Groundskeeper, Alfredo Aguilar