**A G E N D A**
CITY OF SEASIDE
PARKS AND RECREATION

SPECIAL MEETING
440 HARCOURT AVE (COUNCIL CHAMBER)
Monday, January 22, 2024
5:30 PM

***NOTICE:** The City Council and the City's Boards, Commissions and Committees, will hold its public meetings in person, with a virtual option for public view based on availability.*

1. To view this meeting: Please click on the following link to the City of Seaside's Recreation YouTube Channel: https://www.youtube.com/channel/UC8Y_aD_dLjYsqZYtSwnaKNg

2. To view this meeting: Using the Zoom application on your smart phone, laptop, tablet or desktop and click on this link:
https://us02web.zoom.us/j/81754708643?pwd=RjNEU2xNMDhlNFFpWjB6b0pGSGgzdz09
**WEBINAR ID:** 817 5470 8643

3. To listen by phone: Please call (669) 900-6833
Enter the meeting ID 817 5470 8643 and passcode 417485 when prompted. There is no participate code – press the pound sign # after the recording prompts you.

4. To make public comment, the following options are available:

**Before the Meeting via Email:** Written comments can be emailed to dmeewis@ci.seaside.ca.us Include the following subject line: "Public Comment Item #___" (insert the agenda item number relevant to your comment). Written comments must be received at least two (2) hours prior to the meeting time on the day of the meeting.

**During the Meeting via Oral Comments:** When the Chair calls for public comment, members of the public participating in person and wishing to address the Commission may approach the podium when the Chair calls for public comment.

## 1. CALL TO ORDER

## 2. ROLL CALL - PARKS AND RECREATION

| | |
|---|---|
| Alicia Louise Gaines-Lynch | Chair |
| Bobby Maxwell | Vice Chair |
| James White | Commissioner |
| Dianne Nielson | Commissioner |
| Chris Moulton | Commissioner |
| Robert Daniels | Commissioner |
| Jeanette Walton | Commissioner |
| Karla Lobo | Commissioner |

3. **PUBLIC COMMENT**

*Members of the public wishing to address the Commission on matters within the jurisdiction of the City of Seaside, but not on this agenda, may do so during the Public Comment period for up to three (3) minutes. Comments on specific agenda items are heard under that item. For the public record, please state your name.*

4. **APPROVAL OF MINUTES**

   A. **DECEMBER 18, 2023 MINUTES**

5. **REVIEW OF AGENDA**

*If there are any items that arose after the 72-hour posting deadline, this is the point in the meeting where a vote may be taken to add the item to the agenda. (A 2/3-majority vote is required).*

6. **BUSINESS ITEMS**

   A. **NOMINATION AND ELECTION OF A NEW CHAIR AND VICE CHAIR FOR THE PARKS & RECREATION COMMISSION**

   B. **SUBMISSION OF FORM 700**

   C. **REVIEW AND DISCUSS THE ARBOR DAY PROPOSAL (VICE CHAIR MAXWELL)**

   D. **DISCUSS WAYS TO INCREASE PUBLIC COMMUNICATION AND OUTREACH (COMMISSIONERS NIELSON AND LOBO)**

   E. **REVIEW AND DISCUSS THE TREE GIVEAWAY PROGRAM (VICE CHAIR MAXWELL AND COMMISSIONER NIELSON)**

   F. **DISCUSS OPPORTUNITIES FOR COLLABORATION WITH BLUES IN THE PARK (COMMISSIONER LOBO)**

   G. **REVIEW AND DISCUSS THE ADOPT A PARK PROGRAM (COMMISSIONER LOBO)**

   H. **DISCUSS OPPORTUNITIES FOR WORKING COOPERATIVELY WITH FOSPA AND OTHER CITY COMMISSIONS (COMMISSIONER LOBO)**

7. **REPORTS FROM RECREATION STAFF**

## 8. REPORTS FROM PARKS STAFF

## 9. REPORTS FROM COMMISSIONERS

## 10. ADJOURNMENT

Next Scheduled Special Meeting:
February 26, 2024
5:30 PM

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The City of Seaside is committed to providing accessible facilities and accommodating people with disabilities in all of its services programs and activities. If special considerations are needed by any person to fully participate in this meeting, contact the City Clerk at 899-6707 no fewer than two business days prior to the meeting to allow reasonable arrangements. Agendas are posted at: http://www.ci.seaside.ca.us/129/City-Council-Committee-Agendas

Agenda-related writings or documents provided during public meetings are available for public inspection during the meeting or from the office of the City Clerk. This agenda is posted in compliance with California Governor Newsom's Executive Orders N-29-20 and N-33-20.

**MINUTES**
CITY OF SEASIDE
PARKS AND RECREATION
COMMISSION

**SPECIAL MEETING**
440 Harcourt Avenue (Chamber)
Monday, December 18, 2023
5:30 p.m.

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1. **CALL TO ORDER:**
The meeting was called to order at: 5:30 p.m.

2. **ROLL CALL – ESTABLISHMENT OF QUORUM:**

**PARKS & RECREATION COMMISSION:**

| | | | |
|---|---|---|---|
| Alicia Louise Gaines-Lynch | Chair | _X__ | |
| Bobby Maxwell | Vice Chair | _X__ | |
| James White | Commissioner | _X__ | |
| Dianne Nielson | Commissioner | _X__ | |
| Chris Moulton | Commissioner | ___ | (Excused Absence) |
| Robert Daniels | Commissioner | ___ | (Excused Absence) |
| Jeanette Walton | Commissioner | ___ | (Excused Absence) |
| Karla Lobo | Commissioner | _X__ | |

**STAFF:**
Dan Meewis _X__ Terry Navarro _X__ Carolyn Burke _X__

3. **GUESTS:**
* Dennis Alexander – Vice Chair of the Neighbor Improvement Commission
* Jeannie Reese - FOSPA

4. **PUBLIC COMMENTS:**

* None

5. **APPROVAL OF NOVEMBER 20 2023 MINUTES:**
* Dianne Nielson/Bobby Maxwell (with 5 corrections) M/S/P

6. **REVIEW OF AGENDA:**
If there are any items that arose after the 72-hour posting deadline, this is the point in the meeting where a vote may be taken to add the item to the agenda. (A 2/3-majority vote is required)

* None

7. **BUSINESS ITEMS**

A. **PRELIMINARY DISCUSSION ON THE POTENTIAL LOCATIONS FOR A PUMP-TRACK:**

* For the last couple of years, the Public Works department has had a pimp-track listed in the five-year Capital Improvement Plan (CIP).

* Carolyn Burke (Assistant Public Works Director) presented the potential locations for a pump-track in Seaside to the Parks & Recreation Commission to get their input. In the CIP fiscal year 2023-24, $25,000.00 was allotted for park selection and concept plan. Potential locations that were discussed were Mescal Neil Park, Portola Leslie Park, and Laguna Grande Park. Please see the attached presentation for more information.

* Commissioner Lobo asked Carolyn to go over the funding. Carolyn went over the budget and the funds that were allotted. Commissioner Lobo asked why Havana Soliz Park was taken off the list of locations. Carolyn stated after they went through their Master Plan process and getting the feedback, it was not appropriate for a pump-track to be at that park. Commission Lobo asked about the space that was allocated for pump-track. Carolyn stated that it could be as small or as big as you make it. The complexity would be different and they were looking at an half of an acre to an acre in size. Commissioner Lobo asked if pump-tracks are only for bikes. Staff stated that a pump-track is not specifically for bikes. It is also for scooters, roller skates, roller blades, etc. A pump-track is more for coasting and gliding and a lot of adults enjoy it too. Commissioner Lobo stated her recommendation would be to consider Havana Soliz Park specifically because the Mescal Street area has Martin Luther King Jr. School of Arts and International School of Monterey. She also stated that Havana Soliz Park is the only park that encompasses those families that are coming from Ord Grove Avenue, the back end of Ord Terrace Elementary School and Military Avenue. There is not much space there, so she is recommending the pump track to be more difficult for middle school and high school ages.

* Commissioner White asked what the $25,000.00 covered and would the $250,000.00 be available pending the design of the concept plan. Carolyn stated that the $25,000.00 is for the park selection and concept plan and it is up to the City Council about additional funding.

* Commission Nielson asked if this should have been part of the Master Plan. She suggested that they should collaborate with the school district. It would be a nice thing for the schools to have that the public would have access to. She does not support having a pump-track at Laguna Grande Park, Havana Soliz, and Mescal Neil. She does not support a pump-track unless it is in a place that does not interrupt the neighborhood. Commission Nielson really feels that they should be gearing some of the thing in the parks for all ages. She stated that Portola Leslie Park is a possibility because it is near a school.

* Vice Chair Maxwell stated he is in total agreement with Commissioner Nielson that Portola Leslie Park is a possibility for a pump-track because it is near a school.

* Public Comment:

  * Jeannie Reese stated she lives near Havana Soliz Park and Lincoln Cunningham Park. She stated that Havana Soliz Park and Lincoln Cunningham Park would not good places to put a pump-track. She stated that those two parks have neighborhoods close by and having a pump-track could possibly interrupt the neighborhood.

## ~~B.~~ DISCUSS AND REVIEW THE ARBOR DAY CEREMONY PROPOSAL THAT THE PARKS & RECREATION SUBCOMMITTEE WILL PRESENT FOR CONSIDERATION (COMMISSIONER NIELSON:

* Commissioner Nielson stated that the sub-committee wrote a proposal on why Arbor Day Ceremony is important in the City of Seaside. Seaside is proud to be Part of Tree City USA member. She went over the proposal and the potential Arbor Day Community Ceremony Agenda with the Parks & Recreation Commission. Please see the attached proposal and the potential agenda for more details.

* Staff and the Commissioners discussed how to add this to the Sustainable Seaside's Earth Day Special Event that is always in April. Catherine Crockett is the contact person for that event.

* Commissioner voted on the motion: "That the Parks & Recreation Commission collaborates with Sustainable Seaside in their Earth Day Celebration to include the Parks & Recreation Commission's Arbor Day request".
Dianne Nielson/James White M/S/P

* No Public Comment

## C. DISCUSS CHANGING THE JANUARY 15, 2024 SPECIAL MEETING AND THE FEBRUARY 19, 2024 REGULAR MEETING DUE TO THE CITY OBSERVED HOLIDAYS:

* Change January's Parks & Recreation Commission meeting to January 22, 2024. Bobby Maxwell/Karla Lobo M/S/P

* Change February's Parks & Recreation Commission meeting to February 26, 2024. Bobby Maxwell/Karla Lobo M/S/P

* No public comment.

## D. PROVIDE UPDATE OF REINSTATEMENT OF THE YOUTH COMMISSION:

* Staff apologized for the miscommunication on this topic. Commissions are not allowed to make recommendations for other Commissions. Reinstatements needs to be directed by the City Council. After a Commission is reinstated, it would be up to that Commission to make changes to their own ordinance.

* Vice Chair Maxwell asked if they could still go to the City Council and asked to see if the Youth Commission can be started again. Staff stated they would speak to the City Manager and see how he would like to proceed with that.

* Commissioner Lobo asked about the method of having this put on the agenda. Staff stated it would be better if they to go to the City Council as a member of the public and then make a public comment about this. Staff will speak to the City Manager about how to proceed with this.

* Chair Gaines-Lynch asked what months the Youth Commission would be in operation. Staff stated they would operate throughout the year.

* Commissioner voted on the motion: To table the Youth Commission to a later date. Bobby Maxwell/Karla Lobo M/S/P

* No public comment

* Commissioner voted on the motion: To move "Reports from Recreation Staff", "Reports from Parks Staff", and "Reports from Commissioners up on the agenda then do Business Item E and then return to adjourn. Karla Lobo/Dianne Nielson M/S/P

## 8. REPORTS FROM RECREATION STAFF:

* Staff reported that Cereal with Santa was on Saturday, December 02, 2023 at the Oldemeyer Center from 9:00 a.m. to 11:00 a.m. The Annual Winter Wonderland and Tree Lighting was on Friday, December 08, 2023 at City Hall lawn from 6: 00 p.m. to 9:00 p.m. There was snow, carriage rides, photos with Santa, and free hot chocolate. The Holiday Luncheon for the older adults was on Saturday, December 16, 2023 at the Oldemeyer Center. Doors opened at 10:30 a.m. Lunch was served at 12:00 p.m. All three events went very well. Registration is open for winter and spring activities. There will be some new programs coming up. One of the new programs that will be starting in January 2024 is drop in Pickleball at the Oldemeyer Center on Mondays and Fridays.

## 9. REPORTS FROM PARKS STAFF:

* Staff reported that Highland Otis Park playground equipment is pretty much installed and will be completed by the end of December 2023. Fernando Park is about 90% done. They still have the benches and hand rails to install. There has been a slight delay due to the weather. At Pacchetti Park and at Mescal Neil Park they still have a couple of tables to be installed at Mescal Neil Park. At Cutino Park there has been lot that has been done and lot that still needs to be done. They are hoping to get things done at Cutino Park by the end of January. At Sabado Park they have started on the landscaping and should be completed by the middle of January 2024. They will be installing play equipment with a climbing rock, a seahorse rocker, benches and BBQ.

* Vice Chair Maxwell asked if there was going be ta mini ceremony or ribbon cutting at Highland Otis Park for the new apparatus. Staff has not received any information on that, however, will look into that. Vice Chair Maxwell reported that over the weekend the temporary fencing at Cutino Park along Noche Buena street is total knocked down. Staff will look into that.

* Commissioner Nielson stated she went by Sabado Park did not see anything being done there. Staff will look into that.

* Chair Gaines-Lynch stated she has not seen anything being done at Sabado Park. Staff will look into that.

## 10. REPORTS FROM COMMISSIONERS:

* Vice Chair Maxwell stated that Dan has done a tremendous job with the staff that he has been working with. There is a staff shortage and he stated that they should

help by reaching out to friends, family, and community members to see if anyone knows if there is anyone who might be interesting in working in the recreation department.

* Commissioner Nielson stated she attended the Older Adults Holiday Luncheon and Dance to help out. It put her into the Christmas spirit. Everyone was having a good time. They had entertainment, music, Santa Claus and good food. It was a great event.

* Commissioner Lobo reported that there be a peaceful rally against Police brutality and youth on Thursday, December 21, 2023 stating at the Oldemeyer Center at 4:00 p.m. They will be marching down to City Hall to make public comments at the City Council meeting that starts at 5:00 p.m.

* Meeting was adjourned at 6:38 p.m.

**11. BUSINESS ITEMS:**

**E. HOLIDAY LIGHTS CONTEST JUDGING – BUS TOUR:**

* The Commissioners and staff went on a bus tour to judge 13 houses in Seaside that entered the holiday lights contest. They picked a first, second, and third place winner. The winners would be announced at the December 21, 2023 City Council meeting.

* Meeting reconvene at 8:02 p.m.

**12. ADJOURNMENT:** The meeting was adjourned at: 8:03 p.m.

**RESPECTFULLY SUBMITTED,**

| | |
|---|---|
| **Terry Navarro, PRC Clerk** | **Alicia Louise Gaines-Lynch, PRC Chair** |

**Next Special Scheduled Meeting**
**February 26, 2024**
**Time: 5:30 p.m.**
**HYBRID (Virtual & In-Person)**

Attachments from the
December 18, 2023 Meeting

CITY OF SEASIDE
STAFF REPORT

**Item No.:6.A.**

**TO:** Parks and Recreation Commission

**BY:** Carolyn Burke, Assistant Public Works Director

**DATE:** December 18, 2023

**SUBJECT:** **PRELIMINARY DISCUSSION ON THE POTENTIAL LOCATIONS FOR A PUMP-TRACK**

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## PURPOSE

Discussion on the potential locations for a pump-track within the City of Seaside.

## BACKGROUND

For the last couple of years, the public works department has had a pump-track listed in the five-year Capitol Improvement Plan (CIP). Staff would like to get input from the Parks and Recreation Commission to see if they have any potential locations for a pump-track.

## FISCAL IMPACT

No fiscal impact on this item.

## ATTACHMENTS

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# Pump Track – CIP 2023-24
# Parks & Recreation Commissioners
# Initial feedback on location

December 18, 2023 | Parks and Recreation Commission Special Meeting

Carolyn Burke, Assistant Public Works Director

# Background

## Capital Improvement Project List

- **CIP FY2022-23**
  - Install pump track and benches at Havana Soliz Park
  - FY22-23: $250,000; FY23-24: $300,000
- **CIP FY2023-24**
  - Install pump track and benches at park with sufficient space. Initial funding for park selection and concept plan.
  - FY23-24: $25,000; FY24-25: $360,000; FY25-26: $1.28M

# Nearby Projects

- **Marina**

  Glorya Jean Tate Park

  - 0.8 Acres
  - Open 2023

# Nearby Projects

- **Watsonville**

  Ramsay Park

  - 0.5 Acres
  - Open 2021

# Potential Locations

- Mescal Neil Park
  - 0.8 Acres
  - Undulating terrain

# Potential Locations

- Portola Leslie Park
  - 1.4 Acres
  - Adjacent to MLK School for the Arts

# Potential Locations

- Laguna Grande Park
  - 1.3 Acres
  - Hillside Picnic Area (below Eucalyptus Picnic Area)



7

# Next Steps

- Receive preliminary input from PRC on preferred park sites
- Hire design consultant
- Establish site feasibility
- Complete high-level concept plans for pump track
- Present concept design to City Council

# Thank You

**CITY OF SEASIDE**
**STAFF REPORT**

**Item No.: 6.A.**

**TO:** Parks and Recreation Commission

**BY:** Dan Meewis, Recreation Director

**DATE:** December 18, 2023

**SUBJECT:** **DISCUSS AND REVIEW THE ARBOR DAY CEREMONY PROPOSAL THAT THE PARKS & RECREATION SUBCOMMITTEE WILL PRESENT FOR CONSIDERATION (COMMISSIONER NIELSON)**

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## PURPOSE & RECOMMENDATION

## BACKGROUND

The Parks and Recreation Commission formed a subcommittee to discuss the plan to host an Arbor Day Celebration in 2024. This effort was lead by Commissioner Nielson, with the help of commissioners Lobo, Maxwell and Walton. The subcommittee has formulated a plan for the celebration and are ready to present it to the rest of the Parks and Recreation Commission to receive feedback and provide input on how to proceed with the event.

## ATTACHMENTS

None

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Reviewed for Submission to the City Council by:

Jaime M. Fontes, City Manager

## Arbor Day Ceremony Proposal

By Parks and Recreation Subcommittee
Jeanette Walton, Karla Lobo, Bobby Maxwell, Dianne Nielson

We are proud that the City of Seaside is a Tree City USA member. Urban forests, city trees, residential trees, trees in open spaces, parks, and businesses provide enormous benefits to our city. Trees help mitigate climate change and storm water runoff, provide shade, sequester carbon dioxide, create a sense of well being as well as beauty and are vital for wildlife habitat and our very survival.

And as a Tree City USA the City of Seaside is aware of the importance of trees. One responsibility of Seaside Parks and Recreation Commission is that it is responsible for monitoring, observing and, as a result, making recommendations to the City Council on the condition of our urban forest and presenting ideas on how to improve it

Tree cities are required to meet a yearly minimum criteria to remain so. The public works department staff plants a number of trees each April to meet part of this criteria. Our community is not made aware of where and when these trees are planted. Therefore, this is a missed opportunity to highlight the city's commitment to planting trees in our city.

As such, the subcommittee would like to make a proposal that would raise awareness in the community about the importance of planting trees and what our city is doing to contribute to a better environment for its citizens.

The attached Arbor Day Ceremony proposal, which is to hold a yearly public Arbor Day Ceremony to commemorate trees, is attached for your discussion and consideration.

**ARBOR DAY COMMUNITY CEREMONY AGENDA IF AT EARTH DAY EVENT**

**(30 minutes total)**

Involve the community, **engage children and schools**, and make the ceremony interactive as it fosters a sense of ownership and responsibility towards the environment. Consider incorporating local traditions or customs to make the ceremony unique to your city.

**1. Welcome and Introduction (3 minutes)**

- Have a member of the city council welcome attendees, and briefly introduce the purpose and significance of Arbor Day.

**2. Arbor Day Proclamation and flag raising (5 minutes) BOBBY** get flag

- Have the mayor or a representative from the city council read the official Arbor Day proclamation and raise flag for April 22-29.

**3. Tree Planting Demonstration (10-15 minutes) BETH ROCHA**

- Have a local tree expert demonstrate the proper way to plant a tree.
- Explain the significance of planting trees correctly to ensure their survival and growth.
- Select a suitable location for the ceremonial tree planting with a community members, including children, to assist with planting the tree.
- Explain the type of tree being planted and why it was chosen.
- Give a brief presentation about the value of trees, including their environmental benefits, such as reducing air pollution and providing shade.
- Display pictures of where Public Works planted Arbor Day trees in 2023.

**4. Poetry or Reading (3 minutes) KARLA**

- Have a local poet or writer share a short piece of nature-themed poetry, prose or art competition to inspire a deeper connection with trees.

**5. Closing Remarks (2 minutes)**

- Thank attendees for their participation and invite to refreshments table/"Guest Book"

**6. Table for Activity, information on tree giveaway and Social Time KARLA(BZ/ SS?)**

- Paint Kindness rocks for trees. Jeanette
- Provide table/swag/water/info on residential tree giveaway.
- Blue Zones or SS refreshments?

CITY OF SEASIDE
STAFF REPORT

**Item No.:6.C.**

**TO:** Parks and Recreation Commission

**BY:** Dan Meewis, Recreation Director

**DATE:** December 18, 2023

**SUBJECT:** **DISCUSS CHANGING THE JANUARY 15, 2024 SPECIAL MEETING AND THE FEBRUARY 19, 2024 REGULAR MEETING DUE TO THE CITY OBSERVED HOLIDAYS**

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## PURPOSE

## BACKGROUND

The Parks and Recreation Commission typically meets on the third Monday of each month. However, during the months of January and February, the third Monday of each month is generally on a City Observed Holiday. In January, it is Marin Luther King Jr. Day, and in February it is Presidents' Day. Typically, the commission votes during the December meeting to hold meetings during these months on either the second or fourth Monday of the month. The reccommended dates for the meetings are as follows:

Monday January 8, 2024
Monday January 22, 2024
Monday February 12, 2024
Monday February 26, 2024

The commission could also vote to hold a special meeting on another day of the week or they could cancel the meetings all together.

## FISCAL IMPACT

No fiscal impact on this item.

## ATTACHMENTS

**CITY OF SEASIDE**
**STAFF REPORT**

**Item No.: 6.D.**

**TO:** Parks and Recreation Commission

**BY:** Dan Meewis, Recreation Director

**DATE:** December 18, 2023

**SUBJECT:** **PROVIDE UPDATE OF REINSTATEMENT OF THE YOUTH COMMISSION**

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## PURPOSE & RECOMMENDATION

## BACKGROUND

At the Novemeber the Paks and Recreation Commission discussed reinstating the Youth Commission and reviewing the ordinance associated with it. Commissioners decided to table the item until the next meeting and review the ordinance and make changes to discuss at the December meeting. Staff will be proving an update to the commission on the reinstatement process for the Youth Commission.

## ATTACHMENTS

None

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Reviewed for Submission to the City Council by:

Jaime M. Fontes, City Manager

**CITY OF SEASIDE**
**STAFF REPORT**

**Item No.:6.D.**

**TO:** Parks and Recreation Commission

**BY:** Dan Meewis, Recreation Director

**DATE:** December 18, 2023

**SUBJECT:** **HOLIDAY LIGHTS CONTEST JUDGING - BUS TOUR**

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## PURPOSE

Holiday Lights Judging

## BACKGROUND

At the November Parks and Recreation meeting, the commission added an item to the agenda to discuss the Holiday Lights contest that was brought forward by a member of the neighborhood commission. During the meeting, the parks and recreation commission voted to partner with the neighborhood commission and provide a holiday lights contest to the community. However, the details were not fully identified as the neighborhood commission was planning on establishing the details at their November meeting. The neighborhood commission ended up not having a meeting, so recreation department staff developed a brief application online for those households in Seaside interested in entering the contest. The contest will remain open for households to enter until Friday 12/15 at 5pm.

The Parks and Recreation Commission will go on a bus tour of the City and judge all the house that have been entered into the contest. The prize will be a gift certificate to a local seaside business.

## FISCAL IMPACT

The fiscal impact of this item is $150 for prizes:

1st - $75
2nd - $50
3rd - $25

CITY OF SEASIDE
STAFF REPORT

**Item No.:6.A.**

**TO:** Parks and Recreation Commission

**BY:** Dan Meewis, Recreation Director

**DATE:** January 22, 2024

**SUBJECT:** **NOMINATION AND ELECTION OF A NEW CHAIR AND VICE CHAIR FOR THE PARKS & RECREATION COMMISSION**

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## PURPOSE

Selection of a new Chair and Vice Chair of the commission.

## BACKGROUND

Every year the commission needs to select a new Chair and Vice Chair. This typically happens at the first or second meeting of the year. Commissioners will be able to nominate a fellow commissioner to serve in either role. If the nomination is accepted, a vote will be held to determine who will serve as the new Chair or Vice Chair.

## FISCAL IMPACT

No fiscal impact with this item.

## ATTACHMENTS

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CITY OF SEASIDE **Item No.:6.B.**
**STAFF REPORT**

**TO:** Parks and Recreation Commission

**BY:** Dan Meewis, Recreation Director

**DATE:** January 22, 2024

**SUBJECT:** **SUBMISSION OF FORM 700**

## PURPOSE

Review form 700 and submit to the City Celerk

## BACKGROUND

Every year, each commissioner needs to file form 700 with the City Clerk.

## FISCAL IMPACT

## ATTACHMENTS

# 2023-2024 Statement of Economic Interests

# Form 700

A Public Document

***Table of Contents***



***Helpful Resources***

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

## California Fair Political Practices Commission


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


**December 2023**

## Quick Start Guide

Detailed instructions begin on page 3.

# WHEN IS THE ANNUAL STATEMENT DUE?

- March 1 – Elected State Officers, Judges and Court Commissioners, State Board and Commission members listed in Government Code Section 87200
- April 2 – Most other filers

### WHERE DO I FILE?

Most people file the Form 700 with their agency. If you're not sure where to file your Form 700, contact your filing officer or the person who asked you to complete it.

### ITEMS TO NOTE!

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

### NOTHING TO REPORT?

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

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

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

### QUESTIONS?

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

### E-FILING ISSUES?

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

## What's New

**Gift Limit Increase**

The gift limit increased to **$590** for calendar years **2023** and **2024**. The gift limit was $520 for calendar years 2021 and 2022.

## Who must file:

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

***Exception:***

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

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

## Where to file:

**87200 Filers**

| | | |
|---|---|---|
| State offices | ➲ | Your agency |
| Judicial offices | ➲ | The clerk of your court |
| Retired Judges | ➲ | Directly with FPPC |
| County offices | ➲ | Your county filing official |
| City offices | ➲ | Your city clerk |
| Multi-County offices | ➲ | Your agency |

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

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

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

**Candidates file as follow:**

| | | |
|---|---|---|
| State offices, Judicial offices and multi-county offices | ➲ | County elections official with whom you file your declaration of candidacy |
| County offices | ➲ | County elections official |
| City offices | ➲ | City Clerk |
| Public Employee's Retirement System (CalPERS) | ➲ | CalPERS |
| State Teacher's Retirement Board (CalSTRS) | ➲ | CalSTRS |

## How to file:

The Form 700 is available at *www.fppc.ca.gov*. Form 700 schedules are also available in Excel format. Each Statement must have a handwritten "wet" signature or "secure electronic signature," meaning either (1) a signature submitted using an approved electronic filing system or (2) if permitted by the filing officer, a digital signature submitted via the filer's agency email address. (See Regulations 18104 and 18757.) Companies such as Adobe and DocuSign offer digital signature services. All statements are signed under the penalty of perjury and must be verified by the filer**.** See Regulation 18723.1(c) for filing instructions for copies of expanded statements.

## When to file:

### Annual Statements

➲ **March 1, 2024**

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

➲ **April 2, 2024**

- Most other filers

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

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

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

### Assuming Office and Leaving Office Statements

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

***Exception:***

If you assumed office between October 1, 2023, and December 31, 2023, and filed an assuming office statement, you are not required to file an annual statement until March 1, 2025, or April 1, 2025, whichever is applicable. The annual statement will cover the day after you assumed office through December 31, 2024. (See Reference Pamphlet, page 6, for additional exceptions.

### Candidate Statements

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

### Late Statements

**There is no provision for filing deadline extensions unless the filer is serving in active military duty. (See page 19 for information on penalties and fines.)**

### Amendments

Statements may be amended at any time. You are only required to amend the schedule that needs to be revised. It is not necessary to amend the entire filed form. The amended schedule(s) is attached to your original filed statement. Obtain amendment schedules at *www.fppc.ca.gov.*

## Types of Statements

### Assuming Office Statement:

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

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

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

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

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

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

### Annual Statement:

Generally, the period covered is January 1, 2023, through December 31, 2023. If the period covered by the statement is different than January 1, 2023, through December 31, 2023, (for example, you assumed office between October 1, 2022, and December 31, 2022 or you are combining statements), you must specify the period covered.

- Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement must be reported. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2023.
- If your disclosure category changes during a reporting period, disclose under the old category until the effective date of the conflict of interest code amendment and disclose under the new disclosure category through the end of the reporting period.

### Leaving Office Statement:

Generally, the period covered is January 1, 2023, through the date you stopped performing the duties of your position. If the period covered differs from January 1, 2023, through the date you stopped performing the duties of your position (for example, you assumed office between October 1, 2022, and December 31, 2022, or you are combining statements), the period covered must be specified. The reporting period can cover parts of two calendar years.

- Report: Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2023.

### Candidate Statement:

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

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

### Amendments:

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

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

### Expanded Statement:

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

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

# STATEMENT OF ECONOMIC INTERESTS
# COVER PAGE
*A PUBLIC DOCUMENT*

Date Initial Filing Received
*Filing Official Use Only*

*Please type or print in ink.*

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

## 1. Office, Agency, or Court

Agency Name *(Do not use acronyms)*

Division, Board, Department, District, if applicable

Your Position

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

Agency: ____________ Position: ____________

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

- ☐ State
- ☐ Judge, Retired Judge, Pro Tem Judge, or Court Commissioner (Statewide Jurisdiction)
- ☐ Multi-County ____________
- ☐ County of ____________
- ☐ City of ____________
- ☐ Other ____________

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

☐ **Annual:** The period covered is January 1, 2023, through December 31, 2023.

**-or-**

The period covered is ____/____/______, through December 31, 2023.

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

☐ **Leaving Office:** Date Left ____/____/______

*(Check one circle.)*

☐ The period covered is January 1, 2023, through the date of leaving office.

**-or-**

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

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

## 4. Schedule Summary (required)

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

***Schedules attached***

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

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

## 5. Verification

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

DAYTIME TELEPHONE NUMBER
( )

EMAIL ADDRESS

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

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

**Date Signed** ____________
*(month, day, year)*

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

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

### Part 1. Office, Agency, or Court

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

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

**Example:**

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

### Part 2. Jurisdiction of Office

- Check the box indicating the jurisdiction of your agency and, if applicable, identify the jurisdiction. Judges, judicial candidates, and court commissioners have statewide jurisdiction. All other filers should review the Reference Pamphlet, page 13, to determine their jurisdiction.
- If your agency is a multi-county office, list each county in which your agency has jurisdiction.
- If your agency is not a state office, court, county office, city office, or multi-county office (e.g., school districts, special districts and JPAs), check the "other" box and enter the county or city in which the agency has jurisdiction.

**Example:**

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

**1. Office, Agency, or Court**

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

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

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

Agency: N/A Position:

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

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

### Part 3. Type of Statement

Check at least one box. The period covered by a statement is determined by the type of statement you are filing. If you are completing a 2023 annual statement, **do not** change the pre-printed dates to reflect 2024. Your annual statement is used for reporting the **previous year's** economic interests. Economic interests for your annual filing covering January 1, 2024, through December 31, 2024, will be disclosed on your statement filed in 2025. See Reference Pamphlet, page 4.

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

### Part 4. Schedule Summary

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

### Part 5. Verification

Complete the verification by signing the statement and entering the date signed. Each statement must have an original "wet" signature unless filed with a secure electronic signature. (See page 3 above.) All statements must be signed under penalty of perjury and be verified by the filer pursuant to Government Code Section 81004. See Regulation 18723.1(c) for filing instructions for copies of expanded statements. **When you sign your statement, you are stating, under penalty of perjury, that it is true and correct.** Only the filer has authority to sign the statement. An unsigned statement is not considered filed and you may be subject to late filing penalties.

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

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

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

Name

► NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

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

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

IF APPLICABLE, LIST DATE:

__/__/23 ACQUIRED __/__/23 DISPOSED

► NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

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

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

IF APPLICABLE, LIST DATE:

__/__/23 ACQUIRED __/__/23 DISPOSED

► NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

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

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

IF APPLICABLE, LIST DATE:

__/__/23 ACQUIRED __/__/23 DISPOSED

► NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

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

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

IF APPLICABLE, LIST DATE:

__/__/23 ACQUIRED __/__/23 DISPOSED

► NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

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

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

IF APPLICABLE, LIST DATE:

__/__/23 ACQUIRED __/__/23 DISPOSED

► NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

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

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

IF APPLICABLE, LIST DATE:

__/__/23 ACQUIRED __/__/23 DISPOSED

**Comments:** ____________

# Instructions – Schedules A-1 and A-2
## Investments

"Investment" means a financial interest in any business entity (including a consulting business or other independent contracting business) that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency's jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling $2,000 or more at any time during the reporting period. (See Reference Pamphlet, page 13.)

**Reportable investments include:**

- Stocks, bonds, warrants, and options, including those held in margin or brokerage accounts and managed investment funds (See Reference Pamphlet, page 13.)
- Sole proprietorships
- Your own business or your spouse's or registered domestic partner's business (See Reference Pamphlet, page 8, for the definition of "business entity.")
- Your spouse's or registered domestic partner's investments even if they are legally separate property
- Partnerships (e.g., a law firm or family farm)
- Investments in reportable business entities held in a retirement account (See Reference Pamphlet, page 15.)
- If you, your spouse or registered domestic partner, and dependent children together had a 10% or greater ownership interest in a business entity or trust (including a living trust), you must disclose investments held by the business entity or trust. (See Reference Pamphlet, page 16, for more information on disclosing trusts.)
- Business trusts

**You are not required to disclose:**

- Government bonds, diversified mutual funds, certain funds similar to diversified mutual funds (such as exchange traded funds) and investments held in certain retirement accounts. (See Reference Pamphlet, page 13.) (Regulation 18237)
- Bank accounts, savings accounts, money market accounts and certificates of deposits
- Cryptocurrency
- Insurance policies
- Annuities
- Commodities
- Shares in a credit union
- Government bonds (including municipal bonds)
- Retirement accounts invested in non-reportable interests (e.g., insurance policies, mutual funds, or government bonds) (See Reference Pamphlet, page 15.)
- Government defined-benefit pension plans (such as CalPERS and CalSTRS plans)
- Certain interests held in a blind trust (See Reference Pamphlet, page 16.)

**Reminders**

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

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

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

## To Complete Schedule A-1:

Do not attach brokerage or financial statements.

- Disclose the name of the business entity. Do not use acronyms for the name of the business entity, unless it is one that is commonly understood by the public.
- Provide a general description of the business activity of the entity (e.g., pharmaceuticals, computers, automobile manufacturing, or communications).
- Check the box indicating the highest fair market value of your investment during the reporting period. If you are filing a candidate or an assuming office statement, indicate the fair market value on the filing date or the date you took office, respectively. (See page 20 for more information.)
- Identify the nature of your investment (e.g., stocks, warrants, options, or bonds).
- An acquired or disposed of date is only required if you initially acquired or entirely disposed of the investment interest during the reporting period. The date of a stock dividend reinvestment or partial disposal is not required. Generally, these dates will not apply if you are filing a candidate or an assuming office statement.

Examples:

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

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

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

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

**▶ 1. BUSINESS ENTITY OR TRUST**

Name

Address *(Business Address Acceptable)*

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

GENERAL DESCRIPTION OF THIS BUSINESS

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

IF APPLICABLE, LIST DATE:
____/____/**23** ACQUIRED ____/____/**23** DISPOSED

NATURE OF INVESTMENT
☐ Partnership ☐ Sole Proprietorship ☐ ________ Other

YOUR BUSINESS POSITION ________

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

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

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

☐ None or ☐ Names listed below

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

*Check one box:*
☐ INVESTMENT ☐ REAL PROPERTY

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

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

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

IF APPLICABLE, LIST DATE:
____/____/**23** ACQUIRED ____/____/**23** DISPOSED

NATURE OF INTEREST
☐ Property Ownership/Deed of Trust ☐ Stock ☐ Partnership

☐ Leasehold ________ Yrs. remaining ☐ Other ________

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


**▶ 1. BUSINESS ENTITY OR TRUST**

Name

Address *(Business Address Acceptable)*

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

GENERAL DESCRIPTION OF THIS BUSINESS

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

IF APPLICABLE, LIST DATE:
____/____/**23** ACQUIRED ____/____/**23** DISPOSED

NATURE OF INVESTMENT
☐ Partnership ☐ Sole Proprietorship ☐ ________ Other

YOUR BUSINESS POSITION ________

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

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

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

☐ None or ☐ Names listed below

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

*Check one box:*
☐ INVESTMENT ☐ REAL PROPERTY

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

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

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

IF APPLICABLE, LIST DATE:
____/____/**23** ACQUIRED ____/____/**23** DISPOSED

NATURE OF INTEREST
☐ Property Ownership/Deed of Trust ☐ Stock ☐ Partnership

☐ Leasehold ________ Yrs. remaining ☐ Other ________

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


**Comments:** ________

# Investments, Income, and Assets of Business Entities/Trusts

Use Schedule A-2 to report investments in a business entity (including a consulting business or other independent contracting business) or trust (including a living trust) in which you, your spouse or registered domestic partner, and your dependent children, together or separately, had a 10% or greater interest, totaling $2,000 or more, during the reporting period and which is located in, doing business in, planning to do business in, or which has done business during the previous two years in your agency's jurisdiction. (See Reference Pamphlet, page 13.) A trust located outside your agency's jurisdiction is reportable if it holds assets that are located in or doing business in the jurisdiction. Do not report a trust that contains non-reportable interests. For example, a trust containing only your personal residence not used in whole or in part as a business, your savings account, and some municipal bonds, is not reportable.

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

## To Complete Schedule A-2:

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

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

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

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

- Disclose each source of income and outstanding loan **to the business entity or trust** identified in Part 1 if your pro rata share of the **gross** income (including your community property interest in your spouse's or registered domestic partner's share) to the business entity or trust from that source was $10,000 or more during the reporting period. (See Reference Pamphlet, page 11, for examples.) Income from governmental sources may be reportable if not considered salary. See Regulation 18232. Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.
- Disclose each individual or entity that was a source of commission income of $10,000 or more during the reporting period through the business entity identified in Part 1. (See Reference Pamphlet, page 8.)

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

Mark "None" if you do not have any reportable $10,000 sources of income to disclose. Phrases such as "various clients" or "not disclosing sources pursuant to attorney-client privilege" are not adequate disclosure. (See Reference Pamphlet, page 14, for information on procedures to request an exemption from disclosing privileged information.)

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

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

## SCHEDULE B
## Interests in Real Property
(Including Rental Income)

**CALIFORNIA FORM 700**
FAIR POLITICAL PRACTICES COMMISSION

Name

► ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

CITY

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

IF APPLICABLE, LIST DATE:

___/___/**23** ACQUIRED ___/___/**23** DISPOSED

NATURE OF INTEREST
- [ ] Ownership/Deed of Trust
- [ ] Easement
- [ ] Leasehold ________ Yrs. remaining
- [ ] ________ Other

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

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

► ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

CITY

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

IF APPLICABLE, LIST DATE:

___/___/**23** ACQUIRED ___/___/**23** DISPOSED

NATURE OF INTEREST
- [ ] Ownership/Deed of Trust
- [ ] Easement
- [ ] Leasehold ________ Yrs. remaining
- [ ] ________ Other

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

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

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

NAME OF LENDER*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE ________% [ ] None

TERM (Months/Years) ________

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

- [ ] Guarantor, if applicable

NAME OF LENDER*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE ________% [ ] None

TERM (Months/Years) ________

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

- [ ] Guarantor, if applicable

**Comments:** ________

# Instructions – Schedule B
## Interests in Real Property

Report interests in real property located in your agency's jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling $2,000 or more any time during the reporting period. Real property is also considered to be "within the jurisdiction" of a local government agency if the property or any part of it is located within two miles outside the boundaries of the jurisdiction or within two miles of any land owned or used by the local government agency. (See Reference Pamphlet, page 13.)

**Interests in real property include:**

- An ownership interest (including a beneficial ownership interest)
- A deed of trust, easement, or option to acquire property
- A leasehold interest (See Reference Pamphlet, page 14.)
- A mining lease
- An interest in real property held in a retirement account (See Reference Pamphlet, page 15.)
- An interest in real property held by a business entity or trust in which you, your spouse or registered domestic partner, and your dependent children together had a 10% or greater ownership interest (Report on Schedule A-2.)
- Your spouse's or registered domestic partner's interests in real property that are legally held separately by him or her

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

- A residence, such as a home or vacation cabin, used exclusively as a personal residence (However, a residence in which you rent out a room or for which you claim a business deduction may be reportable. If reportable, report the fair market value of the portion claimed as a tax deduction.)
- Some interests in real property held through a blind trust (See Reference Pamphlet, page 16.)
  - **Please note:** A non-reportable property can still be grounds for a conflict of interest and may be disqualifying.

## To Complete Schedule B:

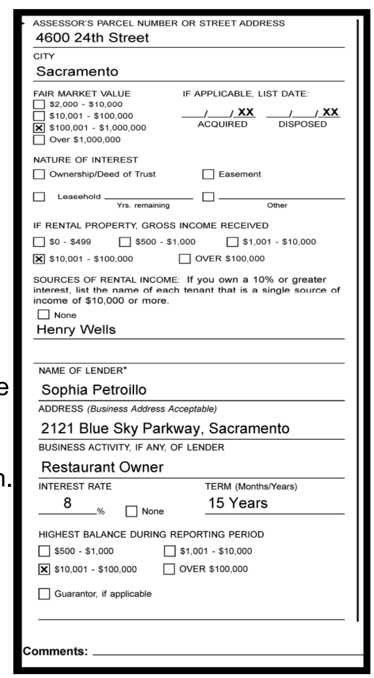
- Report the precise location (e.g., an assessor's parcel number or address) of the real property.
- Check the box indicating the fair market value of your interest in the property (regardless of what you owe on the property).
- Enter the date acquired or disposed only if you initially acquired or entirely disposed of your interest in the property during the reporting period.
- Identify the nature of your interest. If it is a leasehold, disclose the number of years remaining on the lease.
- If you received rental income, check the box indicating the gross amount you received.
- If you had a 10% or greater interest in real property and received rental income, list the name of the source(s) if your pro rata share of the gross income from any single tenant was $10,000 or more during the reporting period. If you received a total of $10,000 or more from two or more tenants acting in concert (in most cases, this will apply to married couples), disclose the first and last name of each tenant. Otherwise, mark "None."
- Loans from a private lender that total $500 or more and are secured by real property may be reportable. **Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.**

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

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

**Example:**

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


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

**Reminders**

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

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

**CALIFORNIA FORM 700**
FAIR POLITICAL PRACTICES COMMISSION

Name

## ► 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

YOUR BUSINESS POSITION

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

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

## ► 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

YOUR BUSINESS POSITION

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

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

## ► 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

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

NAME OF LENDER*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF LENDER

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

INTEREST RATE
______% ☐ None

TERM (Months/Years)

SECURITY FOR LOAN
☐ None ☐ Personal residence
☐ Real Property ______ *Street address*
______ *City*
☐ Guarantor ______
☐ Other ______ *(Describe)*

**Comments:** ______

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

**Reporting Income:**
Report the source and amount of gross income of $500 or more you received during the reporting period. Gross income is the total amount of income before deducting expenses, losses, or taxes and includes loans other than loans from a commercial lending institution. (See Reference Pamphlet, page 11.) You must also report the source of income to your spouse or registered domestic partner if your community property share was $500 or more during the reporting period.

The source and income must be reported only if the source is located in, doing business in, planning to do business in, or has done business during the previous two years in your agency's jurisdiction. (See Reference Pamphlet, page 13.) Reportable sources of income may be further limited by your disclosure category located in your agency's conflict of interest code.

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

**Commonly reportable income and loans include:**
- Salary/wages, per diem, and reimbursement for expenses including travel payments provided by your employer
- Community property interest (50%) in your spouse's or registered domestic partner's income - **report the employer's name and all other required information**
- Income from investment interests, such as partnerships, reported on Schedule A-1
- Commission income not required to be reported on Schedule A-2 (See Reference Pamphlet, page 8.)
- Gross income from any sale, including the sale of a house or car (Report your pro rata share of the total sale price.)
- Rental income not required to be reported on Schedule B
- Prizes or awards not disclosed as gifts
- Payments received on loans you made to others
- An honorarium received prior to becoming a public official (See Reference Pamphlet, page 10.)
- Incentive compensation (See Reference Pamphlet, page 12.)

**Reminders**
- Code filers – your disclosure categories may not require disclosure of all sources of income.
- If you or your spouse or registered domestic partner are self-employed, report the business entity on Schedule A-2.
- Do not disclose on Schedule C income, loans, or business positions already reported on Schedules A-2 or B.

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

(See Reference Pamphlet, page 12.)

**To Complete Schedule C:**

**Part 1. Income Received/Business Position Disclosure**
- Disclose the name and address of each source of income or each business entity with which you held a business position.
- Provide a general description of the business activity if the source is a business entity.
- Check the box indicating the amount of gross income received.
- Identify the consideration for which the income was received.
- For income from commission sales, check the box indicating the gross income received and list the name of each source of commission income of $10,000 or more. (See Reference Pamphlet, page 8.) **Note: If you receive commission income on a regular basis or have an ownership interest of 10% or more, you must disclose the business entity and the income on Schedule A-2.**
- Disclose the job title or business position, if any, that you held with the business entity, even if you did not receive income during the reporting period.

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

# SCHEDULE D
## Income – Gifts

**CALIFORNIA FORM 700**
FAIR POLITICAL PRACTICES COMMISSION

Name ______________________________

► NAME OF SOURCE *(Not an Acronym)*

______________________________

ADDRESS *(Business Address Acceptable)*

______________________________

BUSINESS ACTIVITY, IF ANY, OF SOURCE

______________________________

| DATE (mm/dd/yy) | VALUE | DESCRIPTION OF GIFT(S) |
|---|---|---|
| ____/____/____ | $__________ | ______________________ |
| ____/____/____ | $__________ | ______________________ |
| ____/____/____ | $__________ | ______________________ |

► NAME OF SOURCE *(Not an Acronym)*

______________________________

ADDRESS *(Business Address Acceptable)*

______________________________

BUSINESS ACTIVITY, IF ANY, OF SOURCE

______________________________

| DATE (mm/dd/yy) | VALUE | DESCRIPTION OF GIFT(S) |
|---|---|---|
| ____/____/____ | $__________ | ______________________ |
| ____/____/____ | $__________ | ______________________ |
| ____/____/____ | $__________ | ______________________ |

► NAME OF SOURCE *(Not an Acronym)*

______________________________

ADDRESS *(Business Address Acceptable)*

______________________________

BUSINESS ACTIVITY, IF ANY, OF SOURCE

______________________________

| DATE (mm/dd/yy) | VALUE | DESCRIPTION OF GIFT(S) |
|---|---|---|
| ____/____/____ | $__________ | ______________________ |
| ____/____/____ | $__________ | ______________________ |
| ____/____/____ | $__________ | ______________________ |

► NAME OF SOURCE *(Not an Acronym)*

______________________________

ADDRESS *(Business Address Acceptable)*

______________________________

BUSINESS ACTIVITY, IF ANY, OF SOURCE

______________________________

| DATE (mm/dd/yy) | VALUE | DESCRIPTION OF GIFT(S) |
|---|---|---|
| ____/____/____ | $__________ | ______________________ |
| ____/____/____ | $__________ | ______________________ |
| ____/____/____ | $__________ | ______________________ |

► NAME OF SOURCE *(Not an Acronym)*

______________________________

ADDRESS *(Business Address Acceptable)*

______________________________

BUSINESS ACTIVITY, IF ANY, OF SOURCE

______________________________

| DATE (mm/dd/yy) | VALUE | DESCRIPTION OF GIFT(S) |
|---|---|---|
| ____/____/____ | $__________ | ______________________ |
| ____/____/____ | $__________ | ______________________ |
| ____/____/____ | $__________ | ______________________ |

► NAME OF SOURCE *(Not an Acronym)*

______________________________

ADDRESS *(Business Address Acceptable)*

______________________________

BUSINESS ACTIVITY, IF ANY, OF SOURCE

______________________________

| DATE (mm/dd/yy) | VALUE | DESCRIPTION OF GIFT(S) |
|---|---|---|
| ____/____/____ | $__________ | ______________________ |
| ____/____/____ | $__________ | ______________________ |
| ____/____/____ | $__________ | ______________________ |

**Comments:** ______________________________________________

______________________________________________

# Instructions – Schedule D
## Income – Gifts

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

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

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

**Commonly reportable gifts include:**

- Tickets/passes to sporting or entertainment events
- Tickets/passes to amusement parks
- Parking passes not used for official agency business
- Food, beverages, and accommodations, including those provided in direct connection with your attendance at a convention, conference, meeting, social event, meal, or like gathering
- Rebates/discounts not made in the regular course of business to members of the public without regard to official status
- Wedding gifts (See Reference Pamphlet, page 16)
- An honorarium received prior to assuming office (You may report an honorarium as income on Schedule C, rather than as a gift on Schedule D, if you provided services of equal or greater value than the payment received. See Reference Pamphlet, page 10.)
- Transportation and lodging (See Schedule E.)
- Forgiveness of a loan received by you

**Reminders**

- Gifts from a single source are subject to a $590 limit in 2023. (See Reference Pamphlet, page 10.)
- Code filers – you only need to report gifts from reportable sources.

**Gift Tracking Mobile Application**

- FPPC has created a gift tracking app for mobile devices that helps filers track gifts and provides a quick and easy way to upload the information to the Form 700. Visit FPPC's website to download the app.

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

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

## To Complete Schedule D:

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

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

Name ______________________

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

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

► NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

CITY AND STATE

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

DATE(S): ___/___/___ - ___/___/___ AMT: $________
*(If gift)*

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

☐ Made a Speech/Participated in a Panel

☐ Other - Provide Description ________

► If Gift, Provide Travel Destination ________

► NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

CITY AND STATE

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

DATE(S): ___/___/___ - ___/___/___ AMT: $________
*(If gift)*

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

☐ Made a Speech/Participated in a Panel

☐ Other - Provide Description ________

► If Gift, Provide Travel Destination ________

► NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

CITY AND STATE

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

DATE(S): ___/___/___ - ___/___/___ AMT: $________
*(If gift)*

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

☐ Made a Speech/Participated in a Panel

☐ Other - Provide Description ________

► If Gift, Provide Travel Destination ________

► NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

CITY AND STATE

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

DATE(S): ___/___/___ - ___/___/___ AMT: $________
*(If gift)*

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

☐ Made a Speech/Participated in a Panel

☐ Other - Provide Description ________

► If Gift, Provide Travel Destination ________

**Comments:** ________________________________________

# Instructions – Schedule E
## Travel Payments, Advances, and Reimbursements

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

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

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

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

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

## To Complete Schedule E:

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

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

**Example:**

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

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

Note that the same payment from a 501(c)(3) would NOT be reportable.

**Example:**

Mayor Kim travels to China on a trip organized by China Silicon Valley Business Development, a California nonprofit, 501(c)(6) organization. The Chengdu Municipal People's Government pays for Mayor Kim's airfare and travel costs, as well as meals and lodging during the trip. The trip's agenda shows that the trip's purpose is to promote job creation and economic activity in China and in Silicon Valley, so the trip is reasonably related to a governmental purpose.

► NAME OF SOURCE *(Not an Acronym)*
Chengdu Municipal People's Government
ADDRESS *(Business Address Acceptable)*
2 Caoshi St, CaoShiJie, Qingyang Qu, Chengdu Shi,
CITY AND STATE
Sichuan Sheng, China, 610000
☐ 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE
DATE(S): 09 / 04 / XX - 09 / 08 / XX *(If gift)* AMT: $ 3,874.38
► MUST CHECK ONE: ☒ Gift -or- ☐ Income
○ Made a Speech/Participated in a Panel
⦿ Other - Provide Description Travel reimbursement for trip to China.
► If Gift, Provide Travel Destination Sichuan Sheng, China

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

## Restrictions and Prohibitions

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

### Gift Prohibition

Gifts received by most state and local officials, employees, and candidates are subject to a limit. In 2023-2024, the gift limit increased to $590 from a single source during a calendar year.

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

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

### Disqualification

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

### Honorarium Ban

Most state and local officials, employees, and candidates are prohibited from accepting an honorarium for any speech given, article published, or attendance at a conference, convention, meeting, or like gathering. (See Reference Pamphlet, page 10.)

### Loan Restrictions

Certain state and local officials are subject to restrictions on loans. (See Reference Pamphlet, page 14.)

### Post-Governmental Employment

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

### Late Filing

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

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

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

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

**Form 700 is a Public Document**
**Public Access Must Be Provided**

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

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

# Questions and Answers

## General

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

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

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

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

A. Yes, three are required. However, you may instead complete an expanded statement listing the county and the two boards on the Cover Page or an attachment as the agencies for which you will be filing. Disclose all reportable economic interests in all three jurisdictions on the expanded statement. File the expanded statement for your primary position providing an original "wet" signature unless filed with a secure electronic signature. (See page 3 above.) File copies of the expanded statement with the other two agencies as required by Regulation 18723.1(c). Remember to complete separate statements for positions that you leave or assume during the year.

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

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

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

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

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

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

## Investment Disclosure

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

A. Probably. The definition of "doing business in the jurisdiction" is not limited to whether the business has an office or physical location in your jurisdiction. (See Reference Pamphlet, page 13.)

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

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

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

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

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

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

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

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

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

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

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

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

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

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

### Income Disclosure

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

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

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

A. Regulation 18740 provides a procedure for requesting an exemption to allow a client's name not to be disclosed if disclosure of the name would violate a legally recognized privilege under California or Federal law. This regulation may be obtained from our website at *www.fppc.ca.gov.* (See Reference Pamphlet, page 14.)

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

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

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

A. Sources of income to a business in which you have an ownership interest of 10% or greater are disclosed on Schedule A-2. (See Reference Pamphlet, page 8.)

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

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

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

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

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

A. If your patients exercise sufficient control by selecting you instead of other doctors, then your patients, rather than their insurance carriers, are sources of income to you. (See Reference Pamphlet, page 14.)

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

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

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

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

### Real Property Disclosure

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

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

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

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

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

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

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

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

### Gift Disclosure

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

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

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

A. Yes, each spouse may make a gift valued at the gift limit during a calendar year. For example, during 2023 the gift limit was $590, so the Bensons may have given the supervisor artwork valued at no more than $1,080. The supervisor must identify Jared and Julia Benson as the sources of the gift.

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

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

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

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

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

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

CITY OF SEASIDE
STAFF REPORT

Item No.:6.C.

**TO:** Parks and Recreation Commission

**BY:** Dan Meewis, Recreation Director

**DATE:** January 22, 2024

**SUBJECT:** **REVIEW AND DISCUSS THE ARBOR DAY PROPOSAL (VICE CHAIR MAXWELL)**

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## PURPOSE

Review the Arbor Day proposal.

## BACKGROUND

The Parks and Recreation Commission formed a subcommittee to develop a plan for a City-sponsored Arbor Day event. The commission approved the proposal at the November meeting, and now the Vice Chair would like to review the proposal to start the planning process.

## FISCAL IMPACT

No fiscal impact with this item.

## ATTACHMENTS

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# Arbor Day Ceremony Proposal

By Parks and Recreation Subcommittee
Jeanette Walton, Karla Lobo, Bobby Maxwell, Dianne Nielson

We are proud that the City of Seaside is a Tree City USA member. Urban forests, city trees, residential trees, trees in open spaces, parks, and businesses provide enormous benefits to our city. Trees help mitigate climate change and storm water runoff, provide shade, sequester carbon dioxide, create a sense of well being as well as beauty and are vital for wildlife habitat and our very survival.

And as a Tree City USA the City of Seaside is aware of the importance of trees. One responsibility of Seaside Parks and Recreation Commission is that it is responsible for monitoring, observing and, as a result, making recommendations to the City Council on the condition of our urban forest and presenting ideas on how to improve it

Tree cities are required to meet a yearly minimum criteria to remain so. The public works department staff plants a number of trees each April to meet part of this criteria. Our community is not made aware of where and when these trees are planted. Therefore, this is a missed opportunity to highlight the city's commitment to planting trees in our city.

As such, the subcommittee would like to make a proposal that would raise awareness in the community about the importance of planting trees and what our city is doing to contribute to a better environment for its citizens.

The attached Arbor Day Ceremony proposal, which is to hold a yearly public Arbor Day Ceremony to commemorate trees, is attached for your discussion and consideration.

**ARBOR DAY COMMUNITY CEREMONY AGENDA IF AT EARTH DAY EVENT**

**(30 minutes total)**

Involve the community, **engage children and schools,** and make the ceremony interactive as it fosters a sense of ownership and responsibility towards the environment. Consider incorporating local traditions or customs to make the ceremony unique to your city.

**1. Welcome and Introduction (3 minutes)**

- Have a member of the city council welcome attendees, and briefly introduce the purpose and significance of Arbor Day.

**2. Arbor Day Proclamation and flag raising (5 minutes) BOBBY** get flag

- Have the mayor or a representative from the city council read the official Arbor Day proclamation and raise flag for April 22-29.

**3. Tree Planting Demonstration (10-15 minutes) BETH ROCHA**

- Have a local tree expert demonstrate the proper way to plant a tree.
- Explain the significance of planting trees correctly to ensure their survival and growth.
- Select a suitable location for the ceremonial tree planting with a community members, including children, to assist with planting the tree.
- Explain the type of tree being planted and why it was chosen.
- Give a brief presentation about the value of trees, including their environmental benefits, such as reducing air pollution and providing shade.
- Display pictures of where Public Works planted Arbor Day trees in 2023.

**4. Poetry or Reading (3 minutes) KARLA**

- Have a local poet or writer share a short piece of nature-themed poetry, prose or art competition to inspire a deeper connection with trees.

**5. Closing Remarks (2 minutes)**

- Thank attendees for their participation and invite to refreshments table/"Guest Book"

**6. Table for Activity, information on tree giveaway and Social Time KARLA(BZ/ SS?)**

- Paint Kindness rocks for trees. Jeanette
- Provide table/swag/water/info on residential tree giveaway.
- Blue Zones or SS refreshments?

CITY OF SEASIDE
STAFF REPORT

**Item No.:6.D.**

**TO:** Parks and Recreation Commission

**BY:** Dan Meewis, Recreation Director

**DATE:** January 22, 2024

**SUBJECT:** **DISCUSS WAYS TO INCREASE PUBLIC COMMUNICATION AND OUTREACH (COMMISSIONERS NIELSON AND LOBO)**

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## PURPOSE

Provide input on how to increase public outreach

## BACKGROUND

The Parks & Recreation Commission provides opportunities for the public to weigh in on a variety of programs offered by the Parks and Recreation Department. A constant challenge that occurs is getting the much-needed community input for the projects and programs that the department has to offer or is about to offer. The Commission would like to seek ways to find the best strategies to increase the public engagement process for these situations.

## FISCAL IMPACT

No fiscal impact on this item.

## ATTACHMENTS

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CITY OF SEASIDE
STAFF REPORT

Item No.:6.E.

**TO:** Parks and Recreation Commission

**BY:** Dan Meewis, Recreation Director

**DATE:** January 22, 2024

**SUBJECT:** **REVIEW AND DISCUSS THE TREE GIVEAWAY PROGRAM (VICE CHAIR MAXWELL AND COMMISSIONER NIELSON)**

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## PURPOSE

Review the Tree Giveaway program.

## BACKGROUND

In 2023, the Parks & Recreation Commission had a successful Tree Giveaway Program with the funds that were given to them by the Neighborhood Improvement Commission, and 125 trees were given out to Seaside residents. In 2023, the program ran from April -June. For 2024, the NIC allocated $15,000 for the tree giveaway program and start the new trees in parks program. The plan was to start the programs around the same time as last year, but for this year, members of the commission would like to start the Tree Giveaway Program earlier and collaborate with the Sustainable Seaside Earth Day event.

## FISCAL IMPACT

No fiscal impact with this item.

## ATTACHMENTS

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CITY OF SEASIDE
STAFF REPORT

Item No.:6.F.

**TO:** Parks and Recreation Commission

**BY:** Dan Meewis, Recreation Director

**DATE:** January 22, 2024

**SUBJECT:** **DISCUSS OPPORTUNITIES FOR COLLABORATION WITH BLUES IN THE PARK (COMMISSIONER LOBO)**

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## PURPOSE

Brainstorm ideas for collaboration to participate with Blues in the Park

## BACKGROUND

Every year, the City of Seaside has their Sunday Blues in the Park events at Laguna Grande Park for five weeks, starting on the second Sunday in July and ending in August. The event time is from 1:00 p.m. to 4:30 p. m. They have two bands each Sunday. The Parks & Recreation Commission would like to collaborate and be more involved with these Sunday events.

## FISCAL IMPACT

No fiscal impact with this item.

## ATTACHMENTS

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CITY OF SEASIDE
STAFF REPORT

**Item No.:6.G.**

**TO:** Parks and Recreation Commission

**BY:** Dan Meewis, Recreation Director

**DATE:** January 22, 2024

**SUBJECT:** **REVIEW AND DISCUSS THE ADOPT A PARK PROGRAM (COMMISSIONER LOBO)**

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## PURPOSE

Review the draft Adopt a Park program

## BACKGROUND

Over the last few years, the Parks and Recreation Commission has been working on the Adopt a Park Program. It was started by former Commissioner Cadigan, but it was put on hold due to the COVID-19 Pandemic. In February 2023, the commission reviewed the program again, but it was tabled. The program is almost ready to be rolled-out, and after the commission provides more feedback, and if edits are made, the document will be submitted to the City attorney to be reviewed and provide further directions on rolling out the program.

## FISCAL IMPACT

No fiscal impact on this item.

## ATTACHMENTS

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SEASIDE
CALIFORNIA

City of Seaside
Recreation and Parks Department

986 Hilby Ave
Seaside, CA 93955
831-899-6800

# ADOPT A PARK
# &
# Donation/Commemorative PROGRAM

Creating Community through People, Parks and Programs

# About Adopt A Park

Adopt A Park is a City of Seaside program that allows community volunteers to assist with the care and maintenance of City parks, playgrounds, and open space areas. Adopt a Park maximizes our community's resources with the focus of protecting our outdoor facilities. Most of the City's parks, picnic areas, athletic fields, playgrounds, and open spaces can be adopted.

## Who can Adopt A Park?

- Individuals
- Local businesses
- Schools
- Service clubs
- Youth groups
- Religious organizations

## What can we do when we Adopt A Park?

- Painting and cleaning
- Planting and maintaining landscaped areas
- Clean-up picnic areas and playgrounds
- Donate funds or fundraise for purchase of supplies and maintenance of the above areas

## Adopt A Park Guidelines

- To adopt a City Facility, please contact the City of Seaside Recreation and Parks Department at 831-899-6800.
- Individuals/groups must return the attached application and be approved to adopt a park. All proposed work is subject to prior City staff approval. At times, City staff may work with the individual/group to locate appropriate assignments or donation opportunities.
- Requests to adopt a specific park are processed on a first come, first-serve basis. The Recreation Director shall have final determination as to whether an individual/group can participate and make final assignments.
- Each volunteer is required to register as a City volunteer and sign a waiver before participating in the program. A parent or guardian's signature is required for all persons under the age of 18. When minor participate, the volunteer organization must have emergency contact information accessible at the site. There shall be one adult supervisor for every five children under the age of 15.
- All volunteers shall conduct themselves in a safe manner while participating in the Adopt A Park program. In addition, each volunteer shall wear gloves and/or safety glasses when deemed applicable. Power equipment of any kind shall not be used by volunteers. Pesticides, herbicides, or any other chemical(s) shall not be utilized by any volunteer.

# Adopt A Park Guidelines & Regulations

Work in City Parks, picnic areas, athletic fields, playgrounds, and open spaces shall be done in a safe manner

- Wear light or bright colored clothing, hard sole shoes and use gloves or safety glasses if applicable
- Use sun block and/or wear a hat
- Use proper lifting techniques
- Work only during park hours and always with two or more people
- Take breaks, drink liquids, and dress appropriately.  Do not overexert yourself
- Do not bring small children or pets unless they can be closely monitored
- Never pick-up material/objects that you or others deem as hazardous or dangerous.  Immediately call 911

Click here for the City of Seaside Recreation Services page

Click here for the City of Seaside Illness and Injury Prevention Program (2018)

Click here for the City of Seaside Parks and Recreation Area Municipal Code

Add the City's Volunteer Manual

# City of Seaside Park Descriptions

Seaside Mini-Parks

**Beta Park**
This is a small neighborhood park situated off Elm Street.  Facilities at the site include a children's playground, open play area and paved pathway.  This park is currently served by Friends of Seaside Parks Association

**Capra Park**
Capra Park is located at the corner of Sonoma Avenue and Luzern Street.  Facilities include two playground areas (upper and lower), a picnic area and paved pathways.  This park is currently serviced by Friends of Seaside Parks Association

**Durant Park**
This park is located at the corner of Wanda Avenue between Vallejo Street and Darwin Street.  Facilities include a playground area, an open play area, picnic and barbecue area, benches, and paved pathways.  This park is currently serviced by Friends of Seaside Parks Association

**Ellis Park**
Ellis Park is located off Hilby Avenue adjacent to the Oldemeyer Center.  This park is currently undergoing a complete renovation with an estimated re-opening in fall 2021.

**Farallones Park**
This park is located off Hilby Avenue between Flores Street and Harding Street.  Facilities at the site include a playground area, open play area, paved pathways and small parking area.  This park is currently serviced by Friends of Seaside Parks Association.

**Fernando Montgomery Park**
This park is located on Fernando Street between Mingo Ave. and San Pablo Ave.  This park is currently serviced by Friends of Seaside Parks Association.

**Highland Otis Park**
This park is located off Mingo Ave. between Highland St. and Mendocino St.  Facilities at the site include a playground area, open play area, paved pathways and small parking area with ADA accessibility.  This park is currently serviced by Friends of Seaside Parks Association.

**Roberts Lake ECO Park**
This park features a nature-based play area and an outdoor classroom.  The main focus of this area is to teach our community about water stewardship and water ecology while embracing nature-based play.

**Manzanita Stuart Park**
This park is located off San Pablo Ave. between Yosemite St. and Mescal St.  Facilities include a playground area.  There is a bridge across San Pablo Ave. that connects this park with Lincoln Cunningham Park.

**Martin Park**
Martin Park is located between Luxton St. and Lowell St. and can accessed either off Broadway Ave. or Mingo Ave. Facilities at the site include a playground area, open play area, paved pathways, and small parking area with ADA accessibility.

**Portola Leslie Park**
This park is located adjacent to Marin Luther King School. There are picnic tables and benches.

## Seaside Mini-Parks (continued)

**Sabado Park**
Sabado Park is located between Harding St. and Darwin St. and can be accessed from either San Pablo Ave. or Mingo Ave. There is a small playground at this park.

**Trinity Park**
Located off Trinity Ave. between Hillsdale St. and Fremont Blvd., this park has a large grass area, playground, picnic tables and BBQ area.

## Seaside Neighborhood Parks

**Havana Soliz Park**
Located between Havana St. and Lincoln St., the park is accessed either from La Salle Ave. or San Pablo. An open area with pathways and picnic tables adorn this park.

**Lincoln Cunningham Park**
With a small playground, open areas with pathways and picnic tables, this park is accessed off San Pablo Ave. just east of Yosemite St.

**Pacchetti Dog Park**
Pacchetti Park is the City's first Off Leash Dog Park, named after Seaside's first paid fire chief and in honor of the city's first K-9 unit. This Park is located on the southwest corner of Kimball Ave. and Noche Buena St. This park is currently serviced by Friends of Seaside Parks Association.

## Seaside Community & Regional Parks

**Cutino Park**
Cutino Park is a 6.62-acre multi-use park located at the corner of San Pablo Ave. and Noche Buena St. Cutino Park is one of the most heavily used parks in the City. Existing facilities at the site include a lighted youth baseball field, spectator seating, concession and restroom building, storage building, basketball court, skate park, handball court, playground area, concrete fountain, picnic area and paved pathways.

**Laguna Grande Park**
Laguna Grande Park was established in 1950 as a regional park with the Monterey Peninsula Regional Park District. The park has several picnic areas, playground, restrooms, BBQ facilities, and a stage.

# Donations & Gifts

Donations are important to the vitality of the City of Seaside and its mission to preserve, enhance and strengthen the quality of life in the community. You can add to the beauty of a park, make a difference in a child's life, or honor someone or something special by making a donation or gift to the City of Seaside Recreation and Parks Department.

Donations and gifts to the City of Seaside Recreation and Parks Department may be made in any amount to aid or benefit the services and facilities provided by the department. Gifts may be designated for a specific program, park, or purpose. Gifts may also be unrestricted in which case they will be dispersed to the area of greatest need at the sole discretion of the City of Seaside Recreation and Parks Commission.

## Tax Deductions:

Although the Recreation and Parks Department is a municipal government entity and not part of a nonprofit organization, gifts and donations given to the City of Seaside can be tax deductible if made for "public purposes" such as parks and recreation. The IRS Code, at 26 U.S.C.170(c)(1) defines a "charitable contribution" (which is tax deductible) to include "a contribution or gift to or for the use of a State, a possession of the United States, or any political subdivision of any of the foregoing, or the United States or the District of Columbia, but only if the contribution or gift is made for exclusively public purposes".

## Donors:

Those wishing to donate must complete a written proposal to the Recreation and Parks Department Commission for consideration. Donors are encouraged to speak with Department staff to discuss potential areas of need with the recreation and parks system.

## Donation Process:

- Complete the attached application and submit to City of Seaside Recreation and Parks Department
- Application to be reviewed by Recreation and Parks Commission
- Department staff shall notify donor, in writing within 30 business days
- With a positive review decision, Department staff will initiate and finalize the Donation and Gift Agreement between the City and the Donor
- Once the donation is accepted, constructed/installed, it will be deemed as donated to the City of Seaside

## Types of Donations:

- Monetary
- Trees and shrubs (may be commemorative)
- Small Park amenities
  - Benches
  - Lights
  - Etc.
- Large Park amenities
  - Playgrounds
  - Sport Courts
  - Picnic shelters

# Donations & Gifts

## Commemorative Donations:

Donations may be made to honor and commemorate individuals, families, and/or organizations. Items purchased, installed, or planted are the property of the City of Seaside and shall be maintained by the Parks staff according to department standards. All commemorative donations shall be approved by the City of Seaside Recreation and Parks Commission.

## Recognition:

Donor recognition will be in the form of an engraved bronze plaque (3"x 8") installed in/on the bench or picnic table, in a landscape rock at the base of a tree or an engraving/inscription on features such as a tile, brick, paver, post, or landscape rock. Upon approval of the application for the requested donation, the commemorative feature will be installed within 120 days of receipt of donation. The plaque and commemorative feature will be guaranteed for 10-years after installation. If the commemorative feature is damaged within the 10-year term, it will be repaired or replaced at no cost to the donor. The City of Seaside Recreation and Parks Commission reserves the right to approve all language and content on the plaques or engravings.

## Term:

The initial dedication term will be for a period of 10-years. Once the 10-year term is completed, the donor will have the right of first refusal to renew for an additional 10-years for a cost of ?????. Efforts will be made to contact the donor six months prior to the end of the 10-year term. If no contact is made or the donor chooses not to renew, all engraved item(s) shall be removed. The removed item(s) may be picked up by the donor at no cost. Items will be disposed of after one year. If it is not renewed, then the feature may be rededicated by a new donor.

## Possible Relocation of Commemorative Donation:

Every effort shall be made to honor the placement location of the commemorative feature; however, future park development or unforeseen circumstances may require relocation within the 10-year term. The donor shall be notified by the City of Seaside in the event of relocation. The City of Seaside retains the right to relocate the commemorative feature at any time.

## Cost are as follows and subject to change:

- Tree - 15 gallon $XXX
- Tree – 24" Box $XXX
- Bench $XXX
- Picnic Table (ADA) $XXX
- Specialty Feature $XXX - $XXX

# Frequently Asked Questions

## How do I Adopt A Park?

On the following page you will find an Adopt a Park application. Submit the completed application to: The City of Seaside Recreation and Parks Department, located at 986 Hilby Avenue, Seaside, CA.

## Who Administers the Adopt A Park Program?

The City of Seaside Recreation and Parks Department administers the Adopt A Park program. All projects will be subject to approval by both the Recreation and Parks Department and the Recreation and Parks Commission. In some cases, City Council approval may be necessary.

## What if the park I want to adopt is already adopted or serviced by FOSPA?

Park adoption is offered on a first come, first served basis. If the park you want to adopt is already adopted, you can be placed on waiting list. FOSPA maintains a few parks (as listed in parks descriptions), you are welcome to assist FOSPA with any of their parks. However, you are encouraged to adopt a park that currently does not have a group or individual that assigned.

## What is the cost of adopting a park?

Most supplies needed for adoption must be purchased by the adopter. This may include items such as: long handled tools, trash bags, dust pans, etc. Some equipment may be available upon request. At this time there currently is not a budget for the Adopt A Park program therefore City resources are limited.

## How long does the adoption period last?

Length of the adoption is at the discretion of the City and the Adopting individual or group. The City can cancel the agreement at any time without notice or reason. There is no penalty for the adopter to cancel the agreement. However, if the adopter chooses to terminate the agreement, the location will be made available.

RECREATION DEPARTMENT
986 Hilby Avenue
Seaside, CA 93955
*www.ci.seaside.ca.us*
Telephone 831-899-6800
Fax 831-899-6274

# Adopt A Park Application

Name of Individual or Organization:______________________________________ Date:__________________

Name of Contact:______________________________________________ Phone:_______________________

Address:_____________________________________________________

E-mail:_______________________________________________________ Cell:_________________________

Adopt A Park Location Requested:_____________________________________________________________

Type of Adoption:

☐ Litter Removal ☐ Vegetation Control ☐ Flower Planting

☐ Cleaning ☐ Other ______________________________________

## Terms and Conditions

**Term:** This Agreement shall become effective on the date first set forth and shall continue in effect from year to year thereafter as the parties may mutually agree, provided that either party may terminate this Agreement by giving the other party notice in writing specifying the date of such termination.

**Conditions:**

A. The above-named individual or organization shall develop and follow a regular schedule of maintenance of the Adopt A Park location as agreed upon by the City of Seaside Recreation and Parks Department.
B. The above-named individual or organization shall report any hazards to City staff.
C. Each individual volunteer must sign the City of Seaside Adopt A Park Volunteer Waiver (located on following page)
D. The City of Seaside reserves the right to terminate this agreement at any time.
E. The City of Seaside reserves the right to refuse or deny projects that may not meet the needs of the Recreation and Parks Department.

I have read the above information and herby agree to accept the above Terms and Conditions

_______________________________________ _______________________________________
Adopt A Park Participant Signature Recreation and Parks Director

_______________________________________ _______________________________________
Adopt A Park Participant – Printed Name Date

RECREATION DEPARTMENT
986 Hilby Avenue
Seaside, CA 93955
*www.ci.seaside.ca.us*
Telephone 831-899-6800
Fax 831-899-6274

# Adopt A Park Volunteer

## Waiver, Release, Hold Harmless, and Agreement not to Sue

I, the undersigned, fully understand that my participation as an Adopt a Park Volunteer exposes me to the risk of personal injury, death or property damage. I hereby acknowledge that I am voluntarily participating in this program and agree to assume any such risks.

I hereby release, discharge and agree not to sue the City of Seaside for any injury, death or damage to or loss of personal property arising out of, or in connection with, my participation as an Adopt a Park Volunteer from whatever cause, including the active or passive negligence of the City of Seaside or any other participants in this program. The parties to this AGREEMENT understand that this document is not intended to release any party from any act or omission of "gross negligence," as that term is used in applicable case law and/or statutory provision.

In consideration for being permitted to participate as a Adopt a Park Volunteer, I hereby agree, for myself, my heirs, administrators, executors and assigns, that I shall indemnify, defend, and hold harmless the City of Seaside from any and all claims, demands actions or suits arising out of or in connection with my participation in this event.

I HAVE CAREFULLY READ THIS RELEASE, HOLD HARMLESS AND AGREEMENT NOT TO SUE AND FULLY UNDERSTAND ITS CONTENTS. I AM AWARE THAT IT IS A FULL RELEASE OF ALL LIABILITY AND SIGN IT ON MY OWN FREE WILL.

____________________ ____________________

Signature Date

RECREATION DEPARTMENT

986 Hilby Avenue
Seaside, CA 93955
www.ci.seaside.ca.us

Telephone 831-899-6800
Fax 831-899-6274

# Donation/Commemorative Application

Name of Individual or Organization:_______________________________________ Date:__________________

Name of Contact:_______________________________________________ Phone:________________________

Address:_______________________________________________________

E-mail:_________________________________________________________ Cell:__________________________

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

Desired Location :_____________________________________________________________________________

Type of Donation:

☐ Tree (15 gal.) ☐ Tree (24" box) ☐ Bench

☐ Picnic Table ☐ Special Request ___________________________________________________

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

**Terms and Conditions**

Text: No more than 40 characters per line, up to 4 lines (punctuations an spaces shall be included). Provide desired text **exactly** how you would prefer it to read. City of Seaside Recreation and Parks Commission reserves the right to approve all content.

_____________________________________________________________________________________
_____________________________________________________________________________________
_____________________________________________________________________________________
_____________________________________________________________________________________

Payment: Confirmation of the approved donation request must be completed prior to deposit of payment. Cash, check or money order are the only accepted forms of payment. Please make check or money order payable to City of Seaside. A receipt of donation and plaque approval letter will be provided upon final review of this application.

I have read the above information and herby agree to accept the above Terms and Conditions

_________________________________________
Donor Signature

_________________________________________ _____________________________________________
Donor – Printed Name Date

CITY OF SEASIDE STAFF REPORT

**Item No.:6.H.**

**TO:** Parks and Recreation Commission

**BY:** Dan Meewis, Recreation Director

**DATE:** January 22, 2024

**SUBJECT:** **DISCUSS OPPORTUNITIES FOR WORKING COOPERATIVELY WITH FOSPA AND OTHER CITY COMMISSIONS (COMMISSIONER LOBO)**

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## PURPOSE

Brainstorm ideas for collaboration with FOSPA and other City Commissions.

## BACKGROUND

The Parks and Recreation Commission has increased its communication with FOSPA and other City Commissions over the last year. It has been realized that there are quite a few overlapping items that are brought to each group. The commission recognizes this and would like to build a strong foundation for collaboration with the other commission and FOSPA.

## FISCAL IMPACT

No fiscal impact on this item.

## ATTACHMENTS

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