



NATIONAL ASSOCIATION OF CONSERVATION DISTRICTS The NACD eResource

Weekly News Briefs from NACD

THE VOTE IS IN! NACD CONGRATULATES SONNY PERDUE ON NEW POST



Last night, the Senate voted to confirm former Georgia Governor Sonny Perdue as the head of the U.S. Department of Agriculture. In a [press release](#) issued shortly after the long-awaited vote, NACD President Brent Van Dyke said:

“(Sonny Perdue) has a proven track record for effective governing and a reputation as a dedicated public servant. NACD appreciated his endorsement of voluntary conservation in his nomination hearing, and we look forward to working with him, now and throughout his tenure, to advance the adoption of voluntary conservation on working lands across this country.”

NACD and a long list of other agriculture, wildlife, and conservation groups, sent a letter of support for Perdue's nomination earlier this year. Visit [NACD's Newsroom](#) to learn more.

Join us in welcoming Karla to NACD's staff!

Karla Maldonado, NACD's new senior staff accountant, brings over five years of non-profit experience to the job. She holds a master's degree in business administration from Trinity Washington University and a bachelor's degree in finance from Penn State University. Prior to joining NACD, Karla worked for the National Wildlife Refuge Association (NWRA) as a finance and administration manager. She looks forward to bringing her experience to NACD, learning more about conservation, and continuing her work within the conservation community through finance. You can reach Karla at karla-maldonado@nacdn.net.

Join us in July for NACD's Conservation Forum and Tour in Iowa

NACD and the Conservation Districts of Iowa (CDI) will be jointly hosting the 2017 Conservation Forum and Tour from July 15 to 18 at the Prairie Meadows Hotel in Altoona, Iowa.

To book your hotel room with NACD's special discounted rate of \$107 per night, make your

HAVE YOU CONTACTED YOUR LAWMAKERS YET ON THE CRITICAL IMPORTANCE OF VOLUNTARY CONSERVATION PROGRAMS?

Members of the Oklahoma Association of Conservation Districts board have!



Bryant Reeves of Mangum, Jimmy Emmons of Elk City, Debi Carnott of Watonga, and Steve House of Watonga have all attended town halls in western Oklahoma this month where they asked Rep. Frank Lucas, the chair of the U.S. House of Representatives subcommittee on conservation, about the future of the small watershed flood control program and the farm bill conservation title.

These conservation leaders also made a point to introduce themselves to the congressman's staff at each town hall and to tell them about their conservation districts. Personally reaching out to your representatives is one of the best ways to make your voice heard on Capitol Hill.

Sarah Blaney, OACD director, said her association is using the materials and contact information NACD provided on its [Grassroots Advocacy webpage](#) to communicate the value of locally-led, voluntary, and incentive-based conservation to their members of Congress. If you or your district's representatives are interested in getting involved in NACD's grassroots advocacy effort, visit the webpage! There you'll find information on conservation policy and environmental regulations, sample questions to ask your representatives, letter templates, and a form to subscribe to grassroots alerts.

reservation using one of the following options before Tuesday, June 20:

- Call 515-957-3000 and reference your group block: **NACD Summer Meeting**
- Click on the online booking link on [NACD's summer meeting page](#)

NRCS RSET to cover grazing lands, too

Today, NRCS announced its [Resource Stewardship Evaluation Tool](#) will be available for use on grazing lands in addition to crop lands. RSET is a new tool in conservation planning that helps producers nationwide identify ways to improve conservation outcomes on their operations.

NACD is cooperating with NRCS on a [RSET Trailblazer Recognition Program](#) to recognize producers who have used the service. Are you interested in trying RSET? Contact your local NRCS field office.

Envirothon season is in full swing!

Tomorrow – April 26 – is the first annual Envirothon Spirit Day! Join us in celebrating as we ramp up for the 2017 international NCF-Envirothon competition to take place July 23-29. Show your #envirothonspirit by eating local, taking a photo with your Envirothon team, or sharing your Envirothon story. Submit photos of how you're spending #envirothonspiritday to administration@envirothon.org, or by sharing on [@NCFEnvirothon](#) or the [NCF Envirothon Facebook](#)

WASHINGTON UPDATE FROM NACD



Now that Congress has returned from Easter recess, this week is shaping up to be a big one for conservation districts. Yesterday evening, the [Senate voted to confirm](#) former Georgia Governor Sonny Perdue as the head of USDA. Now that Perdue is official (he was sworn in earlier today), NACD is hopeful additional roles will be filled within USDA.

Today, the Trump Administration held a roundtable discussion with farmers and signed an executive order to create an “interagency task force to examine the concerns of rural America and suggest legislative and regulatory changes to address them.” NACD will be closely following any progress that this task force makes.

By week’s end, Congress is expected to pass an appropriations bill that will fund the federal government through the end of Fiscal Year 2017, averting a government shutdown. NACD is urging Congress to reverse proposed cuts to mandatory farm bill programs, such as EQIP and CSP, and to continue robust discretionary funding for other programs, including NRCS’ Conservation Technical Assistance Program and EPA’s 319 grants.

To tell your members of Congress how important federal voluntary conservation programs are to you and your district, check out our [Grassroots Advocacy webpage](#).

DID YOU KNOW?

Interesting Facts & Anecdotes
from your District Operations and Member Services Committee



[page](#).

Later this week, state Envirothon competitions will convene in Colorado, Florida, Idaho, Illinois, Iowa, Indiana, Nebraska, and North Carolina. China will be hosting their national Envirothon competition this week as well. Stay tuned to eResource for the results!

Job posting: California district seeks professional forester

The El Dorado County Resource Conservation District in Placerville, California, is looking for a registered professional forester or silviculturist to: (1) coordinate grant reporting for a collaborative reforestation strategy project and (2) establish a framework for resource conservation districts throughout California to disseminate information on reforestation issues and needs affecting the state.

To apply, you must submit a written proposal – [the requirements of which can be found here](#) by clicking the “Request for Proposals: Reforestation Cooperative Project” – to District Manager [Mark Egbert](#).

Mark your calendar: Webinar on conservation successes

The [National Association of State Conservation Agencies](#) (NASCA) will be hosting a webinar on May 16 at 10:00am Eastern to showcase success stories of voluntary, incentive-based conservation work led by conservation districts, state

As part of a six-month series on district operations, the Did You Know? monthly feature in eResource will highlight chapters of the NACD District Outlook Task Force report: "Blueprint for Locally-Led Conservation – A Strategy for District Success and Sustainability" ([available here](#) on our website). **This month's chapter tackles structure and governance.**

A healthy conservation district structure requires a balanced approach to funding, governance, and authorities outlined in their state's statutes. District leadership should never be delegated. Each conservation district must assume the lead role in resource assessments and conservation delivery within the district, while regularly engaging additional partners in the locally-led process to identify, discuss, and assess resource needs of the district.

To read the rest of this chapter summary – which includes a list of recommendations for districts – [head to NACD's blog](#).

COORDINATING COALITION FOR SOIL HEALTH MEETS IN WASHINGTON



Because conservation districts play a key role in building and advocating for soil health across the U.S., NACD has been participating as a member of the Coordinating Coalition for Soil Health (CCSH) alongside other non-profit organizations sharing the same concern for and focus on soil health. Last week, the coalition met with five USDA agencies to introduce the group and its coordinated efforts to make soil health a mainstay in land and resource management.

conservation agencies, and their partners. [Click here to register](#) for this free webinar.

Forestry project grant opportunity in the West

The American Forest Foundation (AFF) is offering grants for \$75,000 each year for two years to implement engagement projects that prioritize outreach to forest landowners in Colorado, Utah, or New Mexico. Selected projects will help these landowners restore fire resiliency to their properties and demonstrably safeguard water quality.

If you have questions about the RFP, you must submit them to AFF's Western Conservation Director [Tom Fry](#) before May 5. Proposals are due to Tom Fry on May 19. Winning proposals will be announced June 9.

Will you be attending NACD's Stewardship Week celebration?

Stewardship Week is just around the corner – won't you help us celebrate this year's theme "Healthy Soils Are Full of Life!"?

We've prepared a full agenda and stocked up on gifts in anticipation of our event on May 5 from 9:00am to 2:00pm Eastern in the [USDA People's Garden](#) on the National Mall. Come and learn more about soil conservation with NRCS mascot Sammy Soil and compete for a free set of NACD's 2017 education materials! Quiz participants will be rewarded with a planter kit complete with NACD's logo. Have questions? Email stewardship@nacdnet.org.

NACD was represented by CEO Jeremy Peters and North Central Region Representative Beth Mason, who shared what NACD brings to the coalition by way of on-the-ground outreach efforts and the [Soil Health Champions Network](#).

The CCSH is made up by the following partner organizations: Conservation Technology Information Center, Field to Market, Global Soil Security, National Association of Conservation Districts, North Central Sustainable Agriculture Research and Education, Soil Health Institute, Soil Health Partnership, Soil and Water Conservation Society, The Fertilizer Institute, The Nature Conservancy, The American Society of Agronomy, Crop Science Society of America, and Soil Science Society of America.

Contact Us

509 Capitol Court NE
Washington, D.C. 20002
(202) 547 6223

[email us](#)

NACD Events Calendar


For additional details regarding meetings listed below, [click here](#).

- Stewardship Week - April 30 - May 7, 2017
- Northern Plains Region Meeting - June 5 - 7, 2017
- NACD Summer Conservation Forum and Tour - July 15 - 18, 2017

Need to update your contact information or change your subscription preferences? [Click here](#) to manage your profile.

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River Rally 2017

Grand Rapids, Michigan | May 08 - 11, 2017

Sign-Up By April 20th and Be Entered to Win a Free Professional Membership!

Guess what? There is still time to sign up for the biggest networking and learning event for the river and water community! [Register by Thursday, April 20th](#) and you will be entered in a drawing to win a FREE individual, professional River Network membership valued at \$100!

Current Members get 25% off registration (that's \$162 off full registration). So if you sign up as a Professional Member now, you will more than recoup your costs. And if you win the free membership, we will refund your Member dues. There's really no way you can lose!

Become A Member!

Here are just a few things you can look forward to at this year's event in Grand Rapids:

One-on-One Mentoring is Back!

More to look forward to! We have recruited top-notch, nonprofit experts who bring years of experience with many of the issues you and your organization face. [Check out this year's mentors](#) and sign up before spaces run out!

Lodging

Your registration includes access to the Rally program, included meals, and social events. You are responsible for reserving your lodging. As of April 7th, the Amway Grand is booked for most of River Rally and hotels in downtown Grand Rapids are filling up fast. We recommend you book your lodging ASAP. For lodging ideas, scroll down to the Lodging Information section of [this page](#).

Movie Night!

On Wednesday night, May 10, we'll sit down to watch a fascinating and inspiring compilation of films from the Wild & Scenic Film Festival. We will also get a sneak-preview of opportunities to celebrate and engage communities around the 50th Anniversary of the Wild and Scenic Rivers Act in 2018.

Workshops

There are nearly 60 workshops scheduled and you are free to attend whichever ones you wish, even if you change your mind at the last minute! [Take a sneak-peek](#) now - it's going to be hard to choose!

Field Trips

Don't miss out on the chance to explore our beautiful host location. Reserve a spot [when you register](#)!

REGISTER NOW

Plenary Sessions and Keynote

How Did We Get Here? The Rise of the American Conservation Movement and Water: Power, Privilege, and Environmental Protection

Affordability, Equity, and Drinking Water

Rethinking Our Relationship to Urban Rivers

Lessons from Standing Rock

Get Updates

Stay updated as we add to the program for #RiverRally2017. Follow us!



ABOUT RIVER RALLY

River Rally, hosted annually by [River Network](#), is a national conference that focuses on education, inspiration and celebration with the river and watershed community. Unique in its focus on connecting peers, providing practical education, inspiring courage, and celebrating achievements, River Rally draws hundreds of people together every year from across the United States including NGO staff, academics, agency and foundation representatives, industry innovators, and community leaders.



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Lodging

You are responsible for your own lodging. Although hotel rooms in downtown Grand Rapids are going fast, these sites have options available during the week of River Rally 2017:

- [Travelocity](#)
- [Expedia](#)
- [Hotels.com](#)
- [Trivago](#)
- [Kayak](#)

REGISTER NOW

Plenary Sessions and Keynote

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and Water: Power, Privilege, and Environmental Protection

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[Congratulations River Hero and Compton Award Recipients!](#)[View this email in your browser](#)

River Rally 2017

Grand Rapids, Michigan | May 08 - 11, 2017

Congratulations To Our 2017 River Heroes And Compton Award Winner!

River Network is excited to announce the winners for our River Hero and Compton Awards which will be presented during the River Heroes Banquet on May 11, the final evening of River Rally 2017 in Grand Rapids, MI.

Congratulations to [Angie Rosser](#), [David Sligh](#), [Denny Caneff](#), [Margaret Frisbie](#), and [David Deen](#) who have been selected as our 2017 River Heroes! River Network created the River Heroes Award in 2001 to recognize and celebrate people whose efforts to protect and restore their local waters have been extraordinary in scope, scale, impact and heart. These River Heroes were nominated by peers, selected by peers and will be celebrated by their peers at River Rally.

We are honored to recognize the 45th Chairman of the Standing Rock Sioux Tribe, [Dave Archambault II](#) as our 2017 Compton Award recipient. Recently, Chairman Archambault has emerged as a global leader for Indigenous Peoples' rights as he has led the struggle against the Dakota Access Pipeline, and continues to be a voice for tribal sovereignty in championing protection of tribal treaty lands and natural resources. Each year, River Network's board and staff search the landscape to find an individual whose impact on the health of our country's waters is as deep and abiding as James 'Jim' Compton for whom this award was named.

To read more about all of our 2017 awardees, please visit the [awards page](#) on our website.

Register For River Rally 2017

Plenary Sessions and Keynote

How Did We Get Here? The Rise of the American Conservation Movement
and Water: Power, Privilege, and Environmental Protection

Affordability, Equity, and Drinking Water

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- From: changing course (author: Forest) [\[link\]](#)

Calendar

- June 1-7
[NACD Forestry News August 1-7](#)
- June 10-17
[NACD Forestry News August 10-17](#)
- June 17-24
[NACD Forestry News August 17-24](#)

Putting Firewise to work in Washington

Teddy at National Ridge, an area with a population of over 1,500 people, has been a wildfire threat since the 1950s. The area is now a model of wildfire risk reduction and fire safety.

The National Fire Protection Association has recognized Teddy as a "Firewise Community USA for 2016 and 2017". Firewise is a key component of the Adapted Communities - a collaborative approach that creates all natural resources planning and action work.

Forestry Notes is a monthly publication NACD produces in collaboration with the USDA Forest Service and the National Association of State Foresters. Each edition includes prime examples of district-led forestry projects and partnerships focused on finding and implementing solutions to modern forestry challenges. If you have a story, relevant research, or forestry-related opportunities you would like to share, submit your contribution to the [Forestry Notes Editorial Board](#) by the 15th of the month.

To subscribe to Forestry Notes, [click here](#), or fill out the form below. You can also read the publication's latest feature stories on [NACD's Blog](#).

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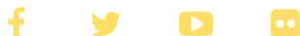
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Water Equity and Civic Management

We believe that access to affordable clean water and healthy rivers is a fundamental human right. Like other human rights, we must be prepared to assert and defend this right. By listening, we can hear the concerns of the communities we are part of; and by working together, we can influence elected officials and resource managers to address these disparities. The articles in this issue of River Voices provide examples of places where access to affordable clean water is not equal, and how civic engagement is making a difference. These articles underscore the variety of ways to become involved, including seeking public office. We hope that this issue sparks your curiosity and encourages you to continue exploring. Water is life. **Thank you contributors!**

Read the whole issue of this quarter's newsletter or hand-pick articles that interest you through the links below.

A SNEAK PEEK AT OUR APRIL ISSUE



Building Power for Water Justice in California's San Joaquin Valley

In California's San Joaquin Valley, many families are forced to rely on bottled water for drinking and cooking—and some have had to do so for more than a decade. At Community Water Center, we work to ensure all Californians have access to safe, clean, and affordable drinking water. To achieve that vision, our organization acts as a catalyst for community-driven water solutions through organizing, education, and advocacy.

[Click here to read more.](#)

Detroiters' Fight for Affordable Water Access Has Lessons for America's Future

Water affordability has reached a crisis level in many communities, including Detroit, Michigan, where aging infrastructure, a declining population, and rising water costs have led the utility to shut off water service to tens of thousands of residents unable to pay their water bills. [Click here to read more.](#)

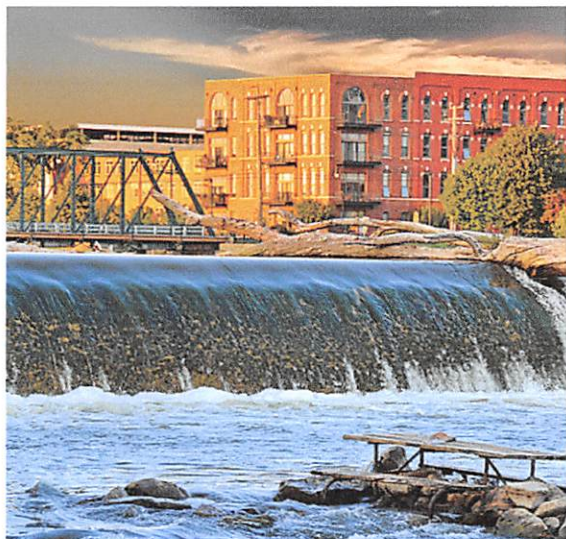
Green Leaders Step Into Electoral Politics

The question of how civic engagement levels are changing in society is under constant study by social researchers and nonprofits. And the current diagnosis is that while the ethos of service remains strong in our culture— younger generations are volunteering at higher rates than their parents'—many Americans have lost trust in our political institutions and in citizens' ability to influence the decisions that impact their lives. [Click here to read more.](#)



Uniting a Rural Community Against a Pipeline

It was the spring of 2014. Rumors of a proposed 42-inch, high-pressure natural gas pipeline began to circulate in the Shenandoah Valley. Details were sketchy, but within a few weeks Virginia's most powerful utility company, Dominion, had scheduled a meeting with the local Augusta County Board of Supervisors to tell them the "good news" regarding "an economic boon" that was headed their way. Jobs, tax dollars, cleaner air, and cheap electricity galore would be their reward for welcoming this utility project into the county. [Click here to read more.](#)



Is your River Network Membership



Additional resources for civic engagement

The field of civic engagement and community organizing has shifted in some significant ways in recent years due to the emergence of technology and social media as public engagement tools, new generations' preferences for how they participate in civic society, and the increasing political polarization of American society. To help you keep up with these changes, we have compiled the following list of tools, resources, guides and technologies related to civic engagement. [Click here to read more.](#)

River Rally 2017 May 8–11, 2017 Grand Rapids, Michigan

We are excited to invite you to join us in Grand Rapids, Michigan for this year's River Rally conference. The program brings together rich content, engaging speakers, and great field trips in an open and supportive atmosphere conducive to connecting with old colleagues and making new friends. [You won't want to miss it!](#)

current? Be sure to **renew or sign up** today so you can receive your River Rally Member discount code for 25% off registration.

SUPPORT OUR WORK

By making a tax-deductible donation to River Network, you are supporting individuals and local, state and regional organizations throughout the U.S. who work to keep our rivers healthy and provide clean and ample water for generations to come. **Donate** or become a **Member** today.



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ABOUT RIVER NETWORK

River Network empowers and unites people and communities to protect and restore rivers and other waters that sustain all life. We envision a future of clean and ample water for people and nature, where local caretakers are well-equipped, effective and courageous champions for our rivers. Visit www.rivernetwork.org to learn more.



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ACTION ITEMS

POLICY: INVESTMENT

Policy:

It is the policy of the Temecula-Elsinore-Anza-Murrieta RCD to invest public funds in a manner which will safeguard principal, meet liquidity and achieve return on investments as referenced in Government Code section 53600.5.

Scope:

This investment policy applies to all financial assets of the Temecula-Elsinore-Anza-Murrieta RCD. These funds are accounted for in the RCD's Comprehensive Annual Financial Report and include:

Funds

1. General
2. Special Revenue Funds
3. Capital Project Funds
4. Enterprise Funds
5. Agency Funds
6. Other Funds

Objectives:

The primary objectives, in priority order, of the Temecula-Elsinore-Anza-Murrieta RCD investment activities shall be:

1. **Safety** – It is the primary duty and responsibility of the Board to protect, preserve, and maintain cash and investment placed in his/her trust.
2. **Liquidity** – An adequate percentage of the RCD's investment portfolio shall be maintained in liquid short-term securities which can be converted to cash if necessary to meet all operating requirements anticipated.
3. **Return on Investment** – The Temecula-Elsinore-Anza-Murrieta RCD's investment portfolio shall be designed with the objective of attaining a market rate of return throughout budgetary and economic cycles, taking into account the RCD's investment risk constraints and cash flow characteristics of the portfolio.
4. **Diversification** – The investment portfolio will be diversified to avoid incurring unreasonable and avoidable risks regarding specific security types or individual financial institutions.

5. **Prudence** – Pursuant to the "prudent person" standard set forth in Government Code Section 53600.3, the Temecula-Elsinore-Anza-Murrieta RCD adheres to the guidance provided by the "Prudent Investor Standard", which obligates a fiduciary to insure that investments shall be made with the exercise of that degree of judgment and care, under circumstances then prevailing, which persons of prudence, discretion, and intelligence exercise in the management of their own affairs, not for speculation but for investment considering the probable safety of their capital as well as the probable income to be derived as referenced in government code section 53600.3.
6. **Public Trust** – All participants in the investment process shall act as custodians of the public trust. Investment officials shall recognize that the investment portfolio is subject to public review and evaluation. The overall program shall be designed and managed with a degree of professionalism that is worthy of the public trust. In a diversified portfolio it must be recognized that occasional measured losses are inevitable, and must be considered within the context of the overall portfolio's investment return, provided that adequate diversification has been implemented.

Delegation of Authority:

Authority to manage the Temecula-Elsinore-Anza-Murrieta RCD's investment program is authorized by Section 9521 of the Public Resources Code (Division 9). Management responsibility for the investment program is maybe delegated, shall establish written procedures for the operation of the investment program consistent with this investment policy. Procedures shall include explicit delegation of authority to persons responsible for investment transactions. No person may engage in an investment transaction except as provided under the terms of this policy and the procedures established by the Board of Directors.

Reporting

A. Monthly

Pursuant to Government Code Section 53607, there shall submitted a monthly investment report to the Board of Directors. This report will include all required elements prescribed by Government Code Section 53600.3 and 53646.

Required Elements:

1. Type of investment
2. Institution
3. Date of Maturity
4. Amount of deposit or cost of security
5. Current market value of securities with maturity in excess of 12 months
6. Rate of Interest
7. Statement relating the report to the Statement of Investment Policy
8. Statement that there are sufficient funds to meet the next 30 days' obligations
9. Accrued Interest as prescribed by California Government Code 53646 (if required by the Legislative Body)

Authorized Investments

Government Code Section 53601 provides legal authorization for the investment of funds of government agencies. All investments of the RCD shall conform to the requirements of applicable law and this Policy, whichever is more restrictive. The Temecula-Elsinore-Anza-Murrieta RCD is authorized by law to invest in the following types of securities:

	<u>Permitted Investments/Deposits</u>	<u>Gov. Code¹</u>	<u>Limit</u>	<u>Maximum Maturity/ Duration</u>
1	United States Treasury securities such as notes, bonds, bills, or certificates of indebtedness	53601(b)	Unlimited	5 years*
2	Federal agency or United States government-sponsored enterprise obligations, participations, or other instruments, including those issued by or fully guaranteed as to principal and interest by federal agencies or United States government-sponsored enterprises	53601(f)	Unlimited	5 years*
3	Registered state warrants or treasury notes or bonds of California and any local agency within California, including bonds payable solely out of the revenues from a revenue-producing property owned, controlled, or operated by the state or by a department, board, agency, or authority of California	53601(c), (e)	Unlimited	5 years*

	<u>Permitted Investments/Deposits</u>	<u>Gov. Code¹</u>	<u>Limit</u>	<u>Maximum Maturity/ Duration</u>
4	Registered treasury notes or bonds of any of the other 49 states in addition to California, including bonds payable solely out of the revenues from a revenue-producing property owned, controlled, or operated by a state or by a department, board, agency, or authority of any of the other 49 states	53601(d)	Unlimited	5 years*
5	Bankers' acceptances	53601(g)	40%**	180 days
6	Commercial paper of "prime" quality of the highest ranking or of the highest letter and number rating as provided for by a nationally recognized statistical rating organization (NRSRO).	53601(h)	25%***	270 days
7	Certificates of Deposit	53601.8	Unlimited	5 years*
8	Negotiable Certificates of Deposit	53601(i)	30%	5 years*
9	Repurchase Agreement	53601(j)	20%	1 Year
10	Reverse Repurchase Agreement	53601(j)	20%	92 days****
11	Medium-Term Notes	53601(k)	30%	5 years
12	Local Agency Investment Fund	16429.1	50mm*****	N/A
13	Designated Mutual Funds	53601(l)	20%	N/A
14	Mortgage-Backed Securities/Collateralized Mortgage Obligations	53601(o)	20%	5 years
15	California Asset Management Program	53601(p)	Unlimited	N/A
16	County Pooled Funds	53684	Unlimited	N/A

¹ All investments must comply with the requirements of the law governing each investment type, even if not listed in this Policy.

* Maximum term unless expressly authorized by Governing-Body within three months prior to the investment.

** No more than 30 percent of the RCD's moneys may be invested in the bankers' acceptances of any one commercial bank.

*** No more than 10 percent of the outstanding commercial paper may be purchased from any single issuer.

- **** Maximum term unless reverse repurchase agreement includes a written codicil guaranteeing a minimum earning or spread for the entire period between the sale of a security and final maturity of such security. Further, it is suggested that the final maturity of the underlying investment security be less than or equal to the maturity of the reverse repurchase agreement. The security to be sold using a reverse repurchase agreement or securities lending agreement must be owned and fully paid for a minimum of 30 days prior to sale. All other requirements of Government Code section 53601 must be met.
- ***** Pursuant to Government Code Section 53601 there is no limitation. \$50 million limit set by Local Agency Investment Fund Governing Elsinore Murrieta Anza Resource Conservation District Board. Should such limit be increased or eliminated by the Local Agency Investment Fund Governing Temecula-Elsinore-Anza-Murrieta Resource Conservation District, the limit shall be the increased amount or unlimited, as applicable.

Authorized Financial Dealers and Institutions

The Treasurer will maintain a list of financial institutions authorized to provide investment services. In addition, a list will also be maintained of approved security broker/dealers selected by credit worthiness who maintain an office in the State of California. No public deposit shall be made except in a qualified public depository as established by state law.

All financial institutions and brokers/dealers who desire to become qualified bidders for investment transactions must supply the Treasurer with the following:

1. Audited Financial Statements
2. Proof of National Association of Security Dealers Certification
3. Trading Resolution
4. Proof of State Registration
5. Completed Broker/Dealer Questionnaire
6. Certification of having read RCD's Investment Policy
7. Depository Contracts

An Annual Review of the financial conditions and registrations of qualified bidders will be conducted by the Board. A current financial statement is required to be on file for each financial institution and broker/dealer in which the Temecula-Elsinore-Anza-Murrieta RCD invests.

Collateral

The amount of securities placed with the Agent of Depository shall at all times be maintained as specified in California Government Code Section 53652 and pursuant to Sections 53656 and 53658.

The purchase of Certificates of Deposits requires the depository to secure public funds. If the collateral is government securities, 110% of market value to the face amount of the deposit is required. Promissory notes secured by first mortgages and first trust deeds used as collateral require 150% of market value to the face amount of the deposit.

Collateral is also identified as the underlying marketable securities provided by a broker/dealer under a repurchase agreement transaction or the marketable securities provided by the Temecula-Elsinore-Anza-Murrieta RCD under a reverse repurchase agreement.

Marketable securities which are provided as collateral under a repurchase agreement with a broker/dealer should be held by the RCD's safekeeping agent at a market value greater than 100%. Request for collateral substitutions and releases should always be subject to the Treasurer's approval.

Safekeeping and Custody

Securities purchased from brokers/dealers should be held in a third party custodian/safekeeping account. Said securities should be held in a manner that establishes the Temecula-Elsinore-Anza-Murrieta RCD's right of ownership.

All securities owned by the Temecula-Elsinore-Anza-Murrieta RCD should be held by a third party except the collateral for time deposits in banks and savings and loans. Collateral for time deposits in savings and loans is held by the Bank or approved Agent of Depository. The collateral for time deposits in banks should be held in the Temecula-Elsinore-Anza-Murrieta RCD's name in the Bank's Trust Department, or alternately, in the Federal Reserve Bank.

Ethics and conflicts of Interest

Directors and employees involved in the investment process shall refrain from personal business activity that could conflict with proper execution of the investment program, or which could impair their ability to make impartial investment decisions. Investment officials and employees shall disclose to the President any material financial interests in financial institutions that conduct business within this jurisdiction, and they shall further disclose any large personal

financial/investment positions that could be related to the performance of the Elsinore Murrieta Anza RCD's portfolio.

Internal Controls

The Board shall establish an annual process of independent review by an external auditor. This review shall provide internal control by assuring compliance with policies and procedures.

Risk Tolerance

The Temecula-Elsinore-Anza-Murrieta RCD recognized that investment risks can result from issuer defaults, market price changes or various technical complications leading to temporary illiquidity. Portfolio diversification is employed as a way to control risk. Investment officials are expected to display prudence in the selection of securities, as a way to minimize default risk. No individual investment transaction shall be undertaken which jeopardized the total capital position of the overall portfolio.

All transactions will be executed on a delivery versus payment basis.

A competitive bid process, when practical, will be used to place all investment purchases. Such a bid process will be used at the discretion of the RCD and the award of any contract will be determined based on the best interests of the RCD.

Statement of Investment Policy

Submit to the Board of Directors an annual "Statement of Investment Policy" pursuant to the requirements of California Government Code Section 53646.

Investment Policy Adoption

Temecula-Elsinore-Anza-Murrieta RCD's investment policy shall be adopted by of the Board of Directors of the Elsinore Murrieta Anza RCD. The policy shall be reviewed on an annual basis and any modifications made thereto approved by a vote of the Board of Directors.

ADOPTED ON _____

Rose Corona-President

NEW BUSINESS

OLD BUSINESS



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2014-2014 bills

QuickBooks Accounting

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Long Range Plan

Rose Corona

Sun 09:23

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Long Range Plan

Rose Corona

Sun 09:23

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RE: cooler for high p...

Anne York

Sat 07:22

4 KB

Fwd: RE: [Non-DoD ...

Rose Corona

Sat 07:18

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RE: cooler for high p...

Anne York

Fri 17:55

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RE: [Non-DoD Sour...

Bartels, Peggy J CIV CESPL CE...

Fri 17:40

7 KB

Follow up

Rose Corona

Fri 17:31

60 KB

RE: [Non-DoD Sour...

Bartels, Peggy J CIV CESPL CE...

Fri 16:49

6 KB

DOC RCD Financial ...

rcd@conservation.ca.gov

Fri 15:58

11 KB

River Voices April Is...

River Network

Fri 14:08

114 KB

Select

Threads

Messages 1 to 50 of 400

Follow up

From Rose Corona Date Fri 17:31

All,

Thank you for the conference call on Wednesday. This is just a follow-up reminder to our conversation in regards to Benton Channel. Attached you will find the original proposal that was submitted to Mission Pacific along with the explanation of the costs which are calculated on an "in perpetuity" basis.

As mentioned on the call, we look forward to seeing your proposal in writing so we may go forward with further discussion with Fish and Wildlife and Flood Control. Mandy Parkes has also offered her assistance and knowledge in going forward and we have copied her here as well as Flood Control so they can be aware of where we are at this moment regarding your project.

Again, thank you and we will be awaiting your proposed offer.

Best Regards,

Rose Corona

Benton Channel Endowment ...

TEAMProposed Endowment C...

ENDOWMENT UPDATE NARRATIVE: BENTON CHANNEL/SHEA HOMES CE

Date: September 2, 2016

EXISTING REQUIREMENTS FOR IN-PERPETUITY SITE MANAGEMENT FOR EMARCD

- Preserve and protect the conservation values of the property
- Enter upon the property at reasonable times to monitor grantor compliance with the terms of the easement
- Prevent any activity in conflict with the intention of the conservation easement
- Require restoration of areas damaged by act/failure to act, or any use of the property inconsistent with the terms of the conservation easement
- Annual reporting
- Annual fund management

PROPOSED REQUIREMENTS FOR IN-PERPETUITY SITE MANAGEMENT FOR EMARCD

Developer proposal: to convey water across the easement in perpetuity, associated with an in-development residential project constructed by Shea Homes. Parties to a cooperative agreement covering stormwater management facilities required for project development include Shea, Valley-Wide Recreation and Park District, and the Riverside County Flood Control and Water Conservation District, the latter of which is required to retain responsibility for water movement and associated impacts.

Impact on EMARCD: movement of water across the property over which the EMARCD holds a conservation easement is not an activity implemented for the conservation benefit/purpose of the property. While it is true that the RCFCWCD holds responsibility for water movement impacts, as the grantee of the easement of the property constituting part of that path of water, EMARCD will hold responsibility for:

- Documenting water movement through the property through at least quarterly site monitoring and coordination with the flood control district regarding water capture and release planning.
- Documenting resulting presence of invasive species through field and office map development, and of other issues associated with water movement such as erosion.
- Reporting of these elements to Shea Homes to enable them to work directly with responsible parties to "cure."
- Restoration of easement property resulting from activities in conflict with original conservation intention of site
- Managing monies received to steward the property in light of this added element
- Prevention of "wasting" of endowment from inflation

NOTE ON UPDATED USACE REQUIREMENTS

As of January 1st 2013, the USACE is requiring an endowment agreement to accompany all Corps-ordered conservation easements. The agreement is a document to be executed between the

Grantee/steward of property and associated funding and the USACE. Among other things, the agreement requires two important elements:

- The need for the Grantee to plan for inflation through determination of an inflation calculation and acknowledgement of need to apply this annual total to the corpus of the endowment rather than spend it.
- The need for the Grantee to perform significant annual funding tracking and reporting, far beyond what has otherwise been required. For this project, it has resulted in the need for additional hours for the District Manager and for the IERCD accountant to ensure property funds tracking and reporting.
- In addition to the agreement, USACE general counsel for this region has provided additional feedback for funds management, including:
 - Legal defense and enforcement fund: monies which may be co-mingled with other legal defense and enforcement funds, to enable EMARCD to bring all force necessary in ensuring compliance with conservation intention of the property.
 - Need for Grantor to provide a 2-year (minimum) spendable fund usable by the Grantee during the first 2-3 years of project management while the endowment builds. This is critical since the agreement identifies all future Corps endowments as non-wasting, meaning they can never drop below initial amount received.

FINAL ENDOWMENT CALCULATION, FOR WATER CONVEYANCE ACTIVITIES AND IN LIGHT OF UPDATED USACE REQUIREMENTS

- Maintenance/Monitoring Endowment Calculation Methodology:
 - Step 1: determination of average annual cost of project management, of \$2,450.58 for performance of all tasks required by updated site activities
 - Step 2: determination of endowment needed capable of generating the annual required funding amount to steward the property according to the requirements of the CE. This is done by dividing estimate annual stewardship cost by estimated long-term rate of return of the EMARCD's investments, using 3.5%. The endowment required to generate average annual costs of stewardship is \$70,016.52
 - Step 3: determining annual inflation factor by multiplying required initial M/M endowment from Step 2 by the average annual inflation amount over the last 20 years (2.38) to get an annual inflation protection factor of \$1,610.38
 - Step 4: determination of non-wasting formula by adding what we will need annually for stewardship to the inflation protection factor that cannot be touched and must be added back into the corpus of the endowment on an annual basis. This totals \$4,060.96
 - Step 5: Factoring the non-wasting formula by 3.5% to get the necessary minimum endowment capable of generating this total on an annual basis, calculated to be \$116,027.37
- Fixed Costs:
 - Initial baseline: \$2,500
 - Legal defense and enforcement fund: \$25,000
 - Spendable 3-year fund: \$12,182.87
- Final Calculation:
 - M/M endowment of \$116,027.37
 - Fixed costs of \$39,682.87
 - **Final Total: \$155,710.25**

Proposed Endowment -
Benton Channel-Mission
Pacific

9/2/2016

Contact Rick Neugebauer
rick.neugebauer@teamrcd.org

	Year 1	Total Cost	Average Annual Cost	Avg Annual Hours
Quarterly Monitoring				
Field Ecologist	\$31.00	\$19,991.56	\$999.58	24
FE Hours	24			
Total	\$744.00			
Fund Management				
Accountant	\$60.00	\$3,224.44	\$161.22	2
Accountant Hours	2			
Total	\$120.00			
Invasive Vegetation Removal				
SAWA Crew	\$60.00	\$25,795.56	\$1,289.78	16
SAWA Crew Hrs	16			
Total	\$960.00			

Fixed Costs:

Initial Assessment	\$2,500.00
Legal Defense and Enforcement	\$25,000.00
3-Year Spendable Fund	\$12,182.87
Fixed Cost Total	\$39,682.87

Endowment Calculation

Avg Yrly Cost:	\$2,450.58
Initial M/M Calculation	\$70,016.52
Inflation Protection Factor	\$1,610.38
Non-Wasting Formula	\$4,060.96
Final M/M Needed	\$116,027.37

Potential Cost*

\$155,710.25

All numbers on this initial cost sheet are ESTIMATES only, to be used in further project discussions,
and expire 60 days from date listed on worksheet

HELIX Environmental Planning, Inc.
7578 El Cajon Boulevard
Suite 200
La Mesa, CA 91942
619.462.1515 tel
619.462.0552 fax
www.helixepi.com



May 3, 2017

Rose Corona
Temecula Elsinore Anza Murrieta Resource Conservation District
P.O. Box 2078
Temecula, CA 92593

Subject: Letter of Intent to Fund Conservation Easement Management at the Benton Channel for the French Valley South Tentative Tract 30837 Project

Dear Ms. Corona:

This serves as a written letter of intent submitted by HELIX Environmental Planning, Inc. (HELIX) on behalf of FVS Partners, LLC to contribute funding toward ongoing management being completed by the Temecula Elsinore Anza Murrieta Resource Conservation District (TEAMRCD) within their existing Conservation Easement (CE) in the Benton Channel, which is an existing Riverside County Flood Control and Water Conservation District (County Flood) facility. The revised funding proposal addressed herein supersedes the previously-submitted proposals dated September 22 and October 6, 2015 to fund a 5-year invasives removal program.

As addressed in previous meetings and correspondence, the French Valley South Tentative Tract 30837 Project (project) requires upsizing of an existing storm drain outfall at the Benton Channel. The upsized-storm drain has been specifically designed and sited within the footprint of the existing storm drain and entirely outside of TEAMRCD's CE, and therefore, would have no direct, physical impact on the CE during construction. The storm drain will discharge treated storm water into the Benton Channel during project operation, at velocities and volumes similar to those being discharged into the Channel under current conditions. The operational effects of the discharge are expected to be largely beneficial to the resources protected within the CE.

In support of TEAMRCD's ongoing management responsibilities in the Benton Channel CE, FVS Partners, LLC proposes to contribute funding in the amount of \$60,000, which is commensurate with the project's proportionate share of potential discharge effects in the Benton Channel. The rationale for the funding contribution is provided in the enclosed Property Assessment Record (PAR) worksheet (Attachment A), which was tailored to identify adequate, supplemental funding for long-term maintenance and management within the CE that is fair and proportionate the potential contributing effects of the project.

The PAR presented herein by FVS Partners, LLC considers the comprehensive PAR prepared by the Inland Empire Resource Conservation District (IERCD) dated September 2, 2016. The IERCD PAR includes assumptions and costs for initial assessment, legal defense and enforcement, and a 3-year spendable fund, which are more appropriate when first initiating a CE, endowment, and long-term management. FVS Partners, LLC proposes that these particular assumptions and costs are not appropriate for comparison considering TEAMRCD's existing management responsibilities in the CE; the assumptions and costs are more appropriate for new CEs and new long-term management endeavors that are being funded for the first time.

Further, pursuant to the Benton Channel CE and agency requirements for the Shea Homes Adeline's Farms project, FVS Partners, LLC understands that TEAMRCD's long-term management responsibilities in the CE took effect seven years ago in 2010 when the CE was signed and recorded. With this, FVS Partners, LLC proposes that some form of initial funding should have been provided to TEAMRCD at that time by Shea Homes, whether by endowment or an alternative funding source. Funding put forth by FVS Partners, LLC in the current proposal should only supplement funds that were originally in place. It is not appropriate or commensurate with the project effects for TEAMRCD to demand that FVS Partners, LLC incur the entire funding burden for long-term management in the Benton Channel CE.

Moreover, the \$60,000 funding proposal and costs identified in the tailored FVS Partners, LLC PAR meet the average yearly costs of \$2,450.58 that were determined in the comprehensive IERCD PAR. The FVS Partners, LLC PAR worksheet in Attachment A demonstrates how the \$60,000 funding could serve management and maintenance actions in the Benton Channel CE if it were deposited into an endowment fund. The line items for quarterly monitoring, fund management, and invasive vegetation removal in Attachment A are consistent with those used in the IERCD PAR. The 3.5% capitalization rate assumed in the IERCD PAR is a reasonable rate of return; however, FVS Partners, LLC proposes that there are alternative fund options available to TEAMRCD that can produce a rate of return as high as 4.25%. These fund options are noted in Attachment A.

In addition to the enclosed PAR worksheet, FVS Partners, LLC also completed a value comparison of what type of mitigation or management actions can reasonably be achieved in the region and within the Benton Channel CE with \$60,000. This is relevant to provide additional context for the appropriateness of the funding considering the effects of the project. Within the Benton Channel CE, \$60,000 can fund up to 0.5 acre of riparian/wetland habitat installation (i.e., planting, seeding, temporary irrigation installation) or non-native invasives removal (i.e., enhancement) covering the entire approximately 4.2 acres (5,195 linear feet) of the Benton Channel CE for up to 15 years. Within the region, \$60,000 can provide up to 0.26 acre of riparian/wetland habitat rehabilitation or 0.31 acre of riparian/wetland habitat enhancement with the Riverside Corona Resource Conservation District (RCRCD) pursuant to their existing In Lieu Fee program, or up to 0.10 acre of riparian/wetland habitat establishment/re-establishment at the San Luis Rey Mitigation Bank (SLRMB). These are just a few real comparisons to provide context to the current proposal.

Letter to Ms. Rose Corona
May 3, 2017

Page 3 of 3

Payment of \$60,000 will be provided to TEAMRCD prior to the start of project construction. Please kindly provide your acceptance of the funding put forth by FVS Partners, LLC by signing below and returning a signed copy of this letter to FVS Partners, LLC for records. Should you have any questions or require additional information, please do not hesitate to contact me at (619) 462-1515 or KarLO@helixepi.com.

Respectfully,



Karl L. Osmundson
Principal Biologist/Biology Group Manager

Cc: Mr. John Abel, Mr. Jason Keller, FVS Partners, LLC

Enclosure: Attachment A – PAR Worksheet for Benton Channel CE Funding Contribution

Agreed and Accepted:

**TEMECULA ELSINORE ANZA MURRIETA RESOURCE CONSERVATION
DISTRICT**

By: _____

Name: _____

Date: _____

Attachment A - Funding Contribution Worksheet - FVS Partners, LLC Benton Channel				Date:	3-May-17		
				Prepared By:	HELIX Environmental Planning, Inc.		
Description of Funding Contribution to Temecula Elsinore Anza Murrieta Resource Conservation District by FVS Partners, LLC							
FVS Partners, LLC agrees to contribute \$60,000 in funding toward long-term management responsibilities in the Benton Channel being completed the Temecula Elsinore Anza Murrieta Resource Conservation District (TEAM RCD).							
TABLE 1: Funding Contribution Worksheet							
Item #	Activity Category	Activity/Expense	Frequency	Hours/Event	# Events/Year	Hourly Cost	Annual Cost
1	Quarterly Monitoring	Qualitative Inspections, General Inventories	Quarterly	6	4	\$31.00	\$744
2	Fund/Program Management	Program oversight, bookkeeping	Annually	2	1	\$60.00	\$120
3	Invasive Vegetation Removal	Weed Control, Trash Removal	Twice-Annually	8	2	\$60.00	\$960
4	Mileage	Mileage Round Trip within 30 Miles	Six Total	60	6	0.6	\$216
5	General Supplies	General	annually	1	1	\$150.00	\$150
6	Dump Fees	Misc.	annually	1	2	\$30.00	\$60
Subtotal	Direct Costs	Sum of Items 1-6					\$2,250
7	10% Contingency	10% of all costs					\$225
						TOTAL ANNUAL COST	\$2,475
Endowment Fund Estimates		Notes					
3.5% Rate Option (IERCD)		At a 3.5% rate of return, it will take an endowment of \$70,714.29 to fund annual costs of \$2,475.					
\$70,714.286							
4.0% Rate Option (Rivers and Lands Conservancy)		At a 4.0% rate of return, it will take an endowment of \$61,875 to fund annual costs of \$2,475.					
\$61,875.00							
4.25% Rate Option (The San Diego Foundation)		At a 4.25% rate of return, it will take an endowment of \$58,235.29 to fund annual costs of \$2,475.					
\$58,235.2941							



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CS KanaleyBandy	
CS Kinsman	
CS McIntire	
CS Rochefort	
CS OlhassoBandy	
CS Prestifilippo	
CS Sahrarian	
CS Schafer	
CS TaylorBandy	

Subject	From	Date	Size
RE: Compilation INVESTMENT PO...	Jeff Nigro	Today 10:59	8 KB
	Rose Corona	Today 09:32	43 KB
RE: Follow up	Wills, Mark	Today 08:09	7 KB
Rose made changes...	Dropbox	Sun 14:57	16 KB
Annual work plan	Rose Corona	Sun 11:28	49 KB
Annual work plan	Rose Corona	Sun 11:27	65 KB
(no subject)	QuickBooks Accounting	Sun 10:15	220 KB
(no subject)	QuickBooks Accounting	Sun 10:14	16 MB
2014-2014 bills	QuickBooks Accounting	Sun 10:11	8.8 MB
2014-2014 bills	QuickBooks Accounting	Sun 10:11	8.8 MB

Select Threads Messages 1 to 50 of 397

RE: Follow upFrom **Wills, Mark** Date **Today 08:09**

Thank you Rose.

-----Original Message-----

From: Rose Corona [mailto:rose.corona@teamrcd.org]

Sent: Friday, April 28, 2017 5:31 PM

To: Karl Osmundson <KarlO@helixepi.com>Cc: Jeff Brandt <Jeff.Brandt@wildlife.ca.gov>; jkeller <jkeller@missionpacific.com>; Dave Mcelroy<dave.mcelroy@teamrcd.org>; Mandy Parkes <mparkes@iercd.org>; Wills, Mark <mwills@RIVCO.ORG>

Subject: Follow up

All,

Thank you for the conference call on Wednesday. This is just a follow-up reminder to our conversation in regards to Benton Channel.

Attached you will find the original proposal that was submitted to Mission Pacific along with the explanation of the costs which are calculated on an "in perpetuity" basis.

As mentioned on the call, we look forward to seeing your proposal in writing so we may go forward with further discussion with Fish and Wildlife and Flood Control. Mandy Parkes has also offered her assistance and knowledge in going forward and we have copied her here as well as Flood Control so they can be aware of where we are at this moment regarding your project.

Again, thank you and we will be awaiting your proposed offer.

Best Regards,

Rose Corona

Confidentiality Disclaimer

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County of Riverside California <<http://www.countyofriverside.us/>>

Conservation Easements Tour 6/9/17

Morgan Hill (aka) Morgan Heights

Monitoring in perpetuity

Maintenance ??

1.29 Ac monitoring for Mitigation 5 yr commitment

0.3 or 1.29 Ac ? Unsure

DRAFT

Adaline Farms (aka Benton Channel)

Monitoring in perpetuity

Maintenance ??

Greer Ranch

Monitoring in perpetuity

270 Acres?

Multiple Owners

Clinton-Keith Property

Our Ownership

STD 204 (Rev. 4/2017)

1	<p>INSTRUCTIONS: Type or print the information. Complete all information on this form. Sign, date, and return to the state agency (department/office) address shown in Box 6. Prompt return of this fully completed form will prevent delays when processing payments.</p> <p>Information provided in this form will be used by California state agencies to prepare Information Returns (Form 1099). See next page for more information and Privacy Statement.</p> <p>NOTE: Governmental entities, i.e. federal, state, and local (including school districts), are not required to submit this form.</p>									
2	<p>PAYEE'S LEGAL BUSINESS NAME (As shown on your income tax return)</p> <hr/> <div style="display: flex; justify-content: space-between;"> <div style="width: 70%;"> <p>SOLE PROPRIETOR OR INDIVIDUAL— ENTER NAME AS SHOWN ON SSN (Last, First, M.I.)</p> <hr/> <p>MAILING ADDRESS</p> <hr/> <p>CITY STATE ZIP CODE</p> </div> <div style="width: 25%;"> <p>E-MAIL ADDRESS</p> <hr/> <p>BUSINESS ADDRESS</p> <hr/> <p>CITY STATE ZIP CODE</p> </div> </div>									
3	PAYEE ENTITY TYPE CHECK ONE BOX ONLY	<p>ENTER FEDERAL EMPLOYER IDENTIFICATION NUMBER (FEIN): - </p> <div style="display: flex; justify-content: space-between;"> <div style="width: 40%;"> <p><input type="checkbox"/> PARTNERSHIP</p> <p><input type="checkbox"/> ESTATE OR TRUST</p> </div> <div style="width: 55%;"> <p>CORPORATION:</p> <p><input type="radio"/> MEDICAL (e.g., dentistry, psychotherapy, chiropractic, etc.)</p> <p><input type="radio"/> LEGAL (e.g., attorney services)</p> <p><input type="radio"/> EXEMPT (nonprofit)</p> <p><input type="radio"/> ALL OTHERS</p> </div> </div> <hr/> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p><input type="checkbox"/> SOLE PROPRIETOR OR INDIVIDUAL</p> <p>Enter social security number (SSN) or Individual taxpayer identification number (ITIN)</p> </div> <div style="width: 50%;"> <div style="border: 1px solid black; display: inline-block; padding: 2px;"> - - </div> <p style="font-size: small;">(SSN required by authority of California Revenue and Tax Code sections 18646 and 18661)</p> </div> </div>								<p>NOTE: Payment will not be processed without an accompanying taxpayer identification number.</p>
4	PAYEE RESIDENCY STATUS	<p><input type="checkbox"/> CALIFORNIA RESIDENT - Qualified to do business in California or maintains a permanent place of business in California.</p> <p><input type="checkbox"/> CALIFORNIA NON RESIDENT (see next page for more information) - Payments to nonresidents for services may be subject to state income tax withholding.</p> <p style="margin-left: 20px;"> <input type="radio"/> No services performed in California. <input type="radio"/> Copy of Franchise Tax Board waiver of state withholding attached. </p>								
5	<p>I hereby certify under penalty of perjury that the information provided on this document is true and correct. Should my residency status change, I will promptly notify the state agency below.</p> <hr/> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>AUTHORIZED PAYEE REPRESENTATIVE'S NAME (Type or Print)</p> <hr/> <p>SIGNATURE</p> <hr/> </div> <div style="width: 15%;"> <p>TITLE</p> <hr/> <p>DATE</p> <hr/> </div> <div style="width: 40%;"> <p>TELEPHONE (include area code)</p> <hr/> <p>E-MAIL ADDRESS</p> <hr/> </div> </div>									
6	<p>Please return completed form to:</p> <hr/> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>DEPARTMENT/OFFICE</p> <hr/> <p>MAILING ADDRESS</p> <hr/> <p>CITY STATE ZIP CODE</p> </div> <div style="width: 55%;"> <p>UNIT/SECTION</p> <hr/> <p>TELEPHONE (include area code) FAX</p> <hr/> <p>E-MAIL ADDRESS</p> <hr/> </div> </div>									

PAYEE DATA RECORD

(Required when receiving payment from the State of California in lieu of IRS W-9 or W-7)

STD-204 (Rev. 4/2017)

1	<p>Requirement to Complete the Payee Data Record, STD 204</p> <p>A completed Payee Data Record, STD 204 form, is required for all payees (non-governmental entities or individuals) entering into a transaction that may lead to a payment from the state. Each state agency requires a completed, signed, and dated STD 204 on file; therefore, it is possible for you to receive this form from multiple state agencies with which you do business.</p> <p>Payees who do not wish to complete the STD 204 may elect not to do business with the state. If the payee does not complete the STD 204 and the required payee data is not otherwise provided, payment may be reduced for federal and state backup withholding. Amounts reported on Information Returns (Form 1099) are in accordance with the Internal Revenue Code (IRC) and the California Revenue and Taxation Code (R&TC).</p>
2	<p>Enter the payee's legal business name. The name must match the name on the payee's tax return as filed with the federal Internal Revenue Service. Sole proprietorships must also include the owner's full name. An individual must list his/her full name as shown on the SSN or as entered on the W-7 form for ITIN.</p> <p>The mailing address should be the address at which the payee chooses to receive correspondence (i.e. 1099 form) and payments. The business address is the address of the business' physical location; do not enter the payment address or lock box information here.</p>
3	<p>Check only one box that corresponds to the payee business type. Corporations must check the box that identifies the type of corporation.</p> <p>The State of California requires that all parties entering into business transactions that may lead to payment(s) from the state provide their Taxpayer Identification Number (TIN). The TIN is required by the R&TC sections 18646 and 18661 to facilitate tax compliance enforcement activities and the preparation of Form 1099 and other information returns as required by the IRC section 6109(a) and R&TC section 18662 and its regulations.</p> <p>Payees must provide one of the following TINs on this form: social security number (SSN), individual taxpayer identification number (ITIN), or federal employer identification number (FEIN). The TIN for sole proprietorships and individuals is the SSN or ITIN. Only partnerships, estates, trusts, and corporations will enter their FEIN.</p>
4	<p>Are you a California resident or nonresident?</p> <p>A corporation will be defined as a "resident" if it has a permanent place of business in California or is qualified through the Secretary of State to do business in California.</p> <p>A partnership is considered a resident partnership if it has a permanent place of business in California. An estate is a resident if the decedent was a California resident at time of death. A trust is a resident if at least one trustee is a California resident.</p> <p>For individuals and sole proprietors, the term "resident" includes every individual who is in California for other than a temporary or transitory purpose and any individual domiciled in California who is absent for a temporary or transitory purpose. Generally, an individual who comes to California for a purpose that will extend over a long or indefinite period will be considered a resident. However, an individual who comes to perform a particular contract of short duration will be considered a nonresident.</p> <p>Payments to all nonresidents may be subject to withholding. Nonresident payees performing services in California or receiving rent, lease, or royalty payments from property (real or personal) located in California will have 7% of their total payments withheld for state income taxes. However, no withholding is required if total payments to the payee are \$1,500 or less for the calendar year.</p> <p>For information on Nonresident Withholding, contact the Franchise Tax Board at the numbers listed below: Withholding Services and Compliance Section: 1-888-792-4900 E-mail address: wscs.gen@ftb.ca.gov For hearing impaired with TDD, call: 1-800-822-6268 Website: www.ftb.ca.gov</p>
5	<p>Provide the name, title, email address, signature, and telephone number of the individual completing this form. Provide the date the form was completed.</p>
6	<p>This section must be completed by the state agency requesting the STD 204.</p>

Privacy Statement

Section 7(b) of the Privacy Act of 1974 (Public Law 93-579) requires that any federal, state, or local governmental agency, which requests an individual to disclose their social security account number, shall inform that individual whether that disclosure is mandatory or voluntary, by which statutory or other authority such number is solicited, and what uses will be made of it.

It is mandatory to furnish the information requested. Federal law requires that payment for which the requested information is not provided is subject to federal backup withholding and state law imposes noncompliance penalties of up to \$20,000.

You have the right to access records containing your personal information, such as your SSN. To exercise that right, please contact the business services unit or the accounts payable unit of the state agency(ies) with which you transact that business.

All questions should be referred to the requesting state agency listed on the bottom front of this form.