HELENDALE COMMUNITY SERVICES DISTRICT

26540 VISTA ROAD, SUITE C, HELENDALE, CA 92342

REGULAR BOARD MEETING

Thursday, July 16, 2026, at 6:00 PM

This meeting of the Board of Directors of the Helendale Community Services District is Open to the public at the District Office located at 26540 Vista Road, Suite C, Helendale, California. Join remotely:
Join: https://teams.microsoft.com/meet/221470159321512?p=RzEWVY8IO8fHk53hsP
Meeting ID: 221 470 159 321 512 Passcode: Jp3UJ6WQ Dial in - 213-436-3171 Phone conference ID: 333 254 665#

Pursuant to Government Code Section 54953(b), Director Rosenberg will attend the meeting via teleconference remotely from: 14171 Branding Iron Dr, Helendale, CA 92342.

Pursuant to Government Code Section 54953(b), Director Cardenas will attend the meeting via teleconference remotely from: 207 Fifth Avenue, San Diego, CA 92101 Room 837.

Call to Order - Pledge of Allegiance

1. Approval of Agenda

2. Public Participation
Anyone wishing to address any matter pertaining to District business listed on the agenda or not, may do so at this time. However, the Board of Directors may not take action on items that are not on the agenda. The public comment period may be limited to three (3) minutes per person. Any member wishing to make comments may do so by filling out the speaker's card in person. Remote participants may request to speak by using the raise your hand feature.

3. Consent Items
    a. Approval of Minutes: Regular Board Meeting – June 18, 2026
    b. Bills Paid Report
    c. May Financial Report

4. Reports
    a. Directors' Reports
    b. General Manager's Report

Regular Business

5. Public Hearing to Receive Comments Regarding Possible Adoption of Resolution 2026-14: A Resolution of the Board of Directors of the Helendale Community Services District Authorizing the Establishment and Continuation of Collection of Water and Sewer Standby Charges for Fiscal Year 2027

6. Public Hearing to Receive Comments Regarding Possible Adoption of Resolution 2026-15: A Resolution of the Board of Directors of the Helendale Community Services District Confirming, or Modifying and then Confirming, the Report of Delinquent Water, Sewer and Trash Collection User Charges for The Purpose of Collecting Said Charges on The San Bernardino County Tax Roll
7. Discussion and Possible Action Regarding Election of Officer for the California Special Districts Association (CSDA) Board of Directors Seat C - Southern Network
8. Discussion and Possible Action Regarding Lions Club Request to Use the Community Center for a Bingo Event
9. Discussion Possible Action Regarding the Purchase of a Backhoe for the Wastewater Department
10. Discussion and Possible Action Regarding Consideration of a Six-Month Pilot Alternative Work Schedule and Modification of Public Office Hours
11. Discussion and Possible Action Regarding Community Resilience Centers Program Round 2 - Authorization to Begin Project Planning and Form Board Ad Hoc Committee

Other Business

12. Requested items for next or future agendas (Directors and Staff only)

13. Adjournment

Pursuant to Government Code Section 54954.2(a), any request for a disability-related modification or accommodation, including auxiliary aids or services, that is sought in order to participate in the above agenized public meeting should be directed to the District's General Manager's office at (760) 951-0006 at least 24 hours prior to said meeting. The regular session of the Board meeting will be recorded. Recordings of the Board meetings are kept for the Clerk of the Board's convenience. These recordings are not the official minutes of the Board meetings.

Helendale Community Services District

26540 Vista Road, Suite C, Helendale, CA 92342

DATE: July 16, 2026
TO: Board of Directors
FROM: Cheryl Vermette, General Manager – Administration / Recreation
SUBJECT: Agenda item # 3A
Consent Items

CONSENT ITEMS:

A. Approval of Minutes: Regular Meeting June 18, 2026

Attendance

Staff Members Present: Alex Aviles, General Manager Wastewater/Solid Waste; Craig Carlson, General Manager - Water Operations/Parks; Cheryl Vermette, General Manager - Administrative Services/Recreation; Gavin Nemake, Maintenance Worker I

Consultants: Steve Kennedy, Legal Counsel

Members of the Public: There were five members of the public present and three members of the San Bernardino County Fire Department.

Call to Order

The meeting was called to order by President Ron Clark at 6:00 p.m. followed by the Pledge of Allegiance.

1. Approval of Agenda

Motion: Director Guinn made a motion to approve the agenda as presented.
Second: Director Rosenberg
Vote: President Ron Clark – Yes; Vice President George Cardenas – Yes; Director Guinn – Yes; Director Rosenberg – Yes; Director DeVries – Absent

2. Public Participation

Dave Hart, Resident, provided comments regarding the recent Concert in the Park. He expressed concerns about the quality of the band's performance, stated that the sound volume was too low, and commented on the accessibility and availability of handicap parking during the event.
Fire Chief Stocker presented the monthly Fire Department statistics.

3. Consent Calendar

a) Approval of Minutes: Regular Board Meeting – May 21, 2026
b) Bills Paid Report – June 4, 2026

Motion: Director Guinn made a motion to approve the consent calendar.
Second: Vice President Cardenas
Vote: President Ron Clark – Yes; Vice President George Cardenas – Yes; Director Guinn – Yes; Director Rosenberg – Yes; Director DeVries – Absent

4. Reports

a. Director's Reports:

Director Guinn thanked the Fire Department for supporting the community yard sale, reported the yard sale was well attended, shared positive feedback from the Burrtec tour, announced the American Legion Annual Golf Tournament on July 3, reported the Concert in the Park Ad Hoc Committee met and discussed entertainment quality, and noted the Silver Lakes Association has an upcoming meeting.

Director Cardenas reported on Joshua Tree mitigation efforts, Assemblymember Juan Carrillo's legislation, and communication with Supervisor CJ Porter regarding a stop sign at Lakeview Drive and Silver Lakes Parkway.

Director Rosenberg discussed traffic concerns at Lakeview Drive and Silver Lakes Parkway, thanked staff for removing the pine tree branches at the Dog Park, reported that the Concert in the Park Ad Hoc Committee met, commented that the community yard sale was well attended, and commented on the Concert in the Park band quality.

General Managers' Report

General Manager Vermette provided updates on the June 27 Flag Football Jamboree, an upcoming soccer tournament, ongoing District operations, and preparations for summer recreation programs.

Regular Business

5. Public Hearing to Receive Comments Regarding Possible Adoption of Resolution 2026-12: A Resolution of the Board of Directors of the Helendale Community Services District Authorizing the Establishment and Continuation of Collection of Refuse Disposal Land Use Fees for Fiscal Year 2027

Discussion: In November 2010, San Bernardino County transferred the Refuse Disposal Land Use Fee to HCSD. The District collects $85.14 per Equivalent Single-Family Residence (ESFR). The fee is a pre-Proposition 13 tax and cannot be increased without voter approval. Without tax-roll collection, monthly trash rates would need to increase by $7.10.

The funds support curbside trash disposal, community clean-up days, document shredding, green-waste disposal, bulky-item pickup, thrift-store dumpsters, dump passes, outreach materials, and one full-time employee.

Resolution 2026-12 authorizes the General Managers to place the fee on the 2026–2027 San Bernardino County property tax roll and make final adjustments before submission. No protests were received. The assessment covers 2,858 parcels, with an estimated total of $246,188.30.

President Clark opened the public hearing at 6:34 pm.

Comments: None

President Clark closed the public hearing at 6:34 pm.

Motion: Director Rosenberg made a motion to adopt Resolution 2026-12 approving the Refuse Land Use assessment.

Second: Director Guinn

Vote: President Ron Clark – Yes; Vice President George Cardenas – Yes; Director Guinn – Yes; Director Rosenberg – Yes; Director DeVries – Absent

6. Discussion and Possible Action Regarding Approval of Open Purchase Orders for Fiscal Year 2027

Discussion: Open Purchase Orders are presented to the Board annually for expenditures that exceed the General Managers' signing authority, are not covered by other contracts or approved regulatory or utility fees and are necessary for District operations. Staff establishes each purchase order in the accounting system with a Board-approved limit. Any increase requires Board approval before the limit is exceeded.

The proposed open purchase orders total **$330,000**:

- Aqua Metrics — **$75,000** for meters
- Brunick, McElhaney & Kennedy — **$95,000** for legal services
- Core & Main — **$25,000** for water supplies
- Western Water Works — **$25,000** for water supplies
- OC WinWater — **$25,000** for water supplies
- Beck Oil — **$50,000** for fuel
- Houston & Harris — **$35,000** for Vactor/CCTV services

Motion: Director Guinn made a motion to approve open purchase orders for FY 2027.

Second: Vice President Cardenas

Vote: President Ron Clark – Yes; Vice President George Cardenas – Yes; Director Guinn – Yes; Director Rosenberg – Yes; Director DeVries – Absent

7. Discussion and Possible Action Regarding Use of the Community Center and Parking Lot for Sunsetters Car Club and Lions Club Events

Discussion: A request was made to use Community Park for a car show on August 8 from 8:00 a.m. to 1:00 p.m. The location was changed from the Community Center parking lot after the agenda materials were distributed. Approximately 100 cars are expected, and some may remain for the Concert in the Park. Operational considerations include setup, parking, and vehicle departures and arrivals overlapping with concert setup.

The Lions Club also requested use of the Community Center for Bingo, tentatively in October. The Lions Club must provide a Bingo Permit from San Bernardino County.

The Board discussed the Sunsetters Car Club request to hold a car show on August 8 from 8:00 a.m. to 1:00 p.m. and agreed to allow the use. Direction was provided to coordinate parking, vendors and logistics with staff. The Board requested additional information regarding the use of the Community Center for the Bingo event.

Motion: Director Rosenberg made a motion to allow the Sunsetters to have a car show from 8 am to 1 pm on August 8th and collaborate with Staff on parking and vendors.
Second: Director Guinn
Vote: President Ron Clark – Yes; Vice President George Cardenas – Yes; Director Guinn – Yes; Director Rosenberg – Yes; Director DeVries – Absent

8. Discussion and Possible Action Regarding Concert in the Park Program Operations and Future Direction

Discussion: Attendance and participation at Concert in the Park had increased, placing greater demands on parking, traffic circulation, accessibility, public safety, vendor placement, and staffing. The existing park infrastructure had not been designed for current attendance levels.

The park had five permanent accessible parking spaces. For the June concert, those spaces had been temporarily converted to a loading, unloading, and emergency-access area, and the informal center parking row had been removed to improve fire access and circulation. Approximately 28 temporary accessible spaces had been created along the south edge of the event lawn, but they had no paved connection to the restrooms, pathways, or event area.

Option 1 included an accessible pathway connecting the temporary parking area to the existing concrete walkways and a 40-foot-by-20-foot concrete parking pad. Bids ranged from $24,600 to $42,500.

Option 2 included the pathway and additional permanent concrete parking along the south edge of the field. Bids were $49,000 from JDR, $62,950 from Worx Construction, and $70,000 from Ross Construction. Arlo Construction had not quoted the parking portion.

An optional extension of the pathway around the perimeter of the south field had been priced at $9,100. The District was responsible for securing applicable permits, and project completion depended on the permitting timeline. Concrete work was expected to take four to five days. Option 3 was to provide alternate direction.

The project would be awarded under Section 6 D.4 of the Purchasing Policy, which required Board approval for purchases between $25,000 and $100,000 and written bid documentation.

Motion: Director Guinn made a motion to approve option 2 to JDR Construction in an amount not to exceed $49,000 with the addition to include concrete to connect south pathway to playground at a cost of $9,100.
Second: Vice President Cardenas

Vote: President Ron Clark – Yes; Vice President George Cardenas – Yes; Director Guinn – Yes; Director Rosenberg – Yes; Director DeVries – Absent

9. Discussion and Possible Action Regarding Adoption of Resolution No. 2026-13: Resolution of the Board of Directors of the Helendale Community Services District Approving Memorandum and First Amendment to Communications License Agreement

Discussion: The District had a long-standing Communications License Agreement with SBA Network Services. The Memorandum and First Amendment updated, extended, and formalized the existing agreement. The terms had been reviewed by the Board during properly noticed closed sessions, and staff had been directed to accept the terms as presented. Resolution No. 2026-13 was presented in an open public meeting to satisfy SBA's administrative request, support public transparency, and finalize the agreement.

Motion: Director Rosenberg made a motion to adopt Resolution 2026-13.
Second: Director Guinn
Vote: President Ron Clark – Yes; Vice President George Cardenas – Yes; Director Guinn – Yes; Director Rosenberg – Yes; Director DeVries – Absent

10. Future Agenda Items

1. Lahontan presentation (August)
2. Introduction of the new Sheriff's Captain

11. Adjournment

President Ron Clark adjourned the meeting at 7:49 p.m.

Ron Clark, President	Cheryl Vermette, Clerk of the Board

The Board actions represent decisions of the Helendale Community Services District Board of Directors. A digital voice recording and copy of the PowerPoint presentation are available upon request at the Helendale CSD office.

Helendale Community Services District

DATE: July 16, 2026
TO: Board of Directors
FROM: Cheryl Vermette, Administrative General Manager
BY: Andrea Chavis, Senior Account Technician
SUBJECT: Agenda item #3b
Consent Items: Bills Paid and Presented for Approval

STAFF RECOMMENDATION
Updated Report Only. Receive and File.

STAFF REPORT:
Staff issued 78 checks and 93 Bank Drafts totaling $930,945.76.

Total Cash Available	7/10/26	5/29/26
Cash	$8,553,462.16	$8,858,316.75
Checks & DFT's Issued	$930,945.76	$245,131.12

INVESTMENT REPORT:
The Investment Report shows the status of the District funds invested as of 7/10/26

	Interest Rate	Interest Income
CA CLASS	3.6963%	$55,130.41 Year To Date
CBB Trust	3.72%	$88,817.46 Year To Date
LAIF	3.816%	$11,497.27 – 3RD Fiscal Quarter

Bills Paid and Presented for Approval

Helendale CSD

Transaction Detail

Issued Date Range: 05/30/2026 - 07/09/2026

Cleared Date Range: -

Issued Date	Number	Description	Amount	Type	Module
Bank Account: 211102187 - CBB Checking					
06/09/2026	29216	Reverse Refund Check GUSTAVO SALGADO	104.03	Check Reversal	Utility Billing
06/09/2026	29220	Reverse Refund Check LONGINO PUENTES	21.38	Check Reversal	Utility Billing
06/09/2026	29317	Reverse Refund Check LINDA DIANNE LYONS LIVING TRUST	176.61	Check Reversal	Utility Billing
06/09/2026	29320	Reverse Refund Check VIDUR BHATNAGAR	416.63	Check Reversal	Utility Billing
06/03/2026	29559	Void Check - Printed Payroll Check on UB/Check in	0.00	Check	Accounts Payable
06/03/2026	29560	Apple Valley Communications, Inc	-720.00	Check	Accounts Payable
06/03/2026	29561	AVCOM Services Inc.	-70.00	Check	Accounts Payable
06/03/2026	29562	Burrtec Waste Industries Inc	-299.16	Check	Accounts Payable
06/03/2026	29563	Cal Fire	-3,126.17	Check	Accounts Payable
06/03/2026	29564	Charles La Pat	-125.00	Check	Accounts Payable
06/03/2026	29565	Citizens Business Bank	-101,312.38	Check	Accounts Payable
06/03/2026	29566	Geo-Monitor, Inc.	-2,507.00	Check	Accounts Payable
06/03/2026	29567	Jason Manness	-440.00	Check	Accounts Payable
06/03/2026	29568	JDS Entertainment	-900.00	Check	Accounts Payable
06/03/2026	29568	JDS Entertainment Reversal	900.00	Check Reversal	Accounts Payable
06/03/2026	29569	Rebecca Gonzalez	-400.00	Check	Accounts Payable
06/03/2026	29570	Robert R. Yeghoian Co., Inc.	-9,500.00	Check	Accounts Payable
06/03/2026	29571	Sierra Analytical Labs, Inc	-851.00	Check	Accounts Payable
06/03/2026	29572	Starting Line Advisory	-1,068.75	Check	Accounts Payable
06/03/2026	29573	The Woodall Group, Inc	-35.00	Check	Accounts Payable
06/03/2026	29574	Underground Service Alert of Southern California	-182.00	Check	Accounts Payable
06/05/2026	29575	SHERRY RENA FRANCO	-51.13	Check	Utility Billing
06/05/2026	29576	CARLOS CAMARA	-494.94	Check	Utility Billing
06/05/2026	29577	DAVID HEREDIA	-443.19	Check	Utility Billing
06/05/2026	29578	ALYSON McGIBBON	-306.66	Check	Utility Billing
06/05/2026	29579	HANNAH & WOODROW WEAVER	-453.00	Check	Utility Billing
06/09/2026	29580	JDS Entertainment	-1,700.00	Check	Accounts Payable
06/10/2026	29581	SANG WHAN BANG	-443.55	Check	Utility Billing
06/11/2026	29582	MWC Group, Inc	-18,450.00	Check	Accounts Payable
06/11/2026	29583	Bakersfield Well & Pump Co.	-750.00	Check	Accounts Payable
06/11/2026	29584	Bartle Wells Associates	-9,890.00	Check	Accounts Payable
06/11/2026	29585	Boot Barn Inc.	-195.70	Check	Accounts Payable
06/11/2026	29586	Burrtec Waste Industries Inc	-486.64	Check	Accounts Payable
06/11/2026	29587	Burrtec Waste Industries, Inc.	-63,682.17	Check	Accounts Payable
06/11/2026	29588	C Wells Pipeline Materials , Inc	-1,052.72	Check	Accounts Payable
06/11/2026	29589	C. J. Brown & Company, CPAs	-360.00	Check	Accounts Payable
06/11/2026	29590	G.A. Osborne Pipe & Supply Inc.	-1,126.73	Check	Accounts Payable
06/11/2026	29591	Geo-Monitor, Inc.	-1,203.50	Check	Accounts Payable
06/11/2026	29592	Senir Dacillo	-69.03	Check	Accounts Payable
06/11/2026	29593	Sierra Analytical Labs, Inc	-207.50	Check	Accounts Payable
06/11/2026	29594	State of California Department of Justice	-49.00	Check	Accounts Payable
06/11/2026	29595	Synagro West, LLC	-854.82	Check	Accounts Payable
06/11/2026	29596	MWC Group, Inc	-21,750.00	Check	Accounts Payable
06/11/2026	29597	Pacific Advanced Civil Engineering, Inc	-34,525.90	Check	Accounts Payable
06/11/2026	29598	Brunick, McElhaney & Kennedy Professional Law Corp	-7,500.00	Check	Accounts Payable
06/12/2026	29599	Silver Lakes Hardware	-102.16	Check	Accounts Payable

Bank Transaction Report

Issued Date	Number	Description	Amount	Type	Module
06/17/2026	29600	ACI Payments, Inc	-61.20	Check	Accounts Payable
06/17/2026	29601	Andy J. Leuridan	-260.00	Check	Accounts Payable
06/17/2026	29602	Burrtec Waste Industries, Inc.	-12,128.66	Check	Accounts Payable
06/23/2026	29603	DR&G SERVICES, LLC	-1,091.56	Check	Utility Billing
06/23/2026	29604	YEGHOIAN GRADING & PAVING	-1,414.94	Check	Utility Billing
06/23/2026	29605	County of San Bernardino, Solid Waste Mgmt. Div.	-572.60	Check	Accounts Payable
06/23/2026	29606	HD Supply, Inc.	-2,348.88	Check	Accounts Payable
06/23/2026	29607	Helendale Community Services District	-271.79	Check	Accounts Payable
06/23/2026	29608	James Harvey	-274.17	Check	Accounts Payable
06/23/2026	29609	MWC Group, Inc	-7,870.00	Check	Accounts Payable
06/23/2026	29610	Sierra Analytical Labs, Inc	-379.50	Check	Accounts Payable
06/23/2026	29611	South West Pump & Drilling, Inc	-103,229.73	Check	Accounts Payable
06/23/2026	29612	Tyler Technologies, Inc.	-40,387.04	Check	Accounts Payable
06/23/2026	29613	Aqua Metrics Sales Company	-13,372.72	Check	Accounts Payable
06/24/2026	29614	SAN BERNARDINO COUNTY SHERIFF'S DEPARTMENT	-4,896.00	Check	Accounts Payable
07/02/2026	29615	Aqua Metrics Sales Company	-15,197.65	Check	Accounts Payable
07/02/2026	29616	AVCOM Services Inc.	-1,185.00	Check	Accounts Payable
07/02/2026	29617	C Wells Pipeline Materials , Inc	-484.88	Check	Accounts Payable
07/02/2026	29618	Charles La Pat	-125.00	Check	Accounts Payable
07/02/2026	29619	G.A. Osborne Pipe & Supply Inc.	-343.41	Check	Accounts Payable
07/02/2026	29620	Geo-Monitor, Inc.	-2,597.00	Check	Accounts Payable
07/02/2026	29621	Helendale Community Services District	-2,475.00	Check	Accounts Payable
07/02/2026	29622	Helendale Community Services District	-725.00	Check	Accounts Payable
07/02/2026	29623	Mobile Occupational Services, Inc.	-80.00	Check	Accounts Payable
07/02/2026	29624	MWC Group, Inc	-25,000.00	Check	Accounts Payable
07/02/2026	29625	Rebecca Gonzalez	-400.00	Check	Accounts Payable
07/02/2026	29626	Senir Dacillo	-183.14	Check	Accounts Payable
07/02/2026	29627	Silver Lakes Association	-2,820.00	Check	Accounts Payable
07/02/2026	29628	Silver Lakes Landscaping and Maintenance LLC	-7,245.00	Check	Accounts Payable
07/02/2026	29629	Tracy Rampersaud Lambertucci	-1,250.00	Check	Accounts Payable
07/02/2026	29630	Tyler Technologies, Inc.	-250.00	Check	Accounts Payable
07/02/2026	29631	Underground Service Alert of Southern California	-59.45	Check	Accounts Payable
07/09/2026	29632	Brunick, McElhaney & Kennedy Professional Law Corp	-7,500.00	Check	Accounts Payable
07/09/2026	29633	Burrtec Waste Industries Inc	-847.33	Check	Accounts Payable
07/09/2026	29634	Cali Coast Electric	-6,528.00	Check	Accounts Payable
07/09/2026	29635	ES OPCO USA LLC	-3,668.04	Check	Accounts Payable
07/09/2026	29636	Geo-Monitor, Inc.	-1,911.50	Check	Accounts Payable
07/09/2026	29637	HD Supply, Inc.	-761.58	Check	Accounts Payable
07/09/2026	29638	JDR Construction	-49,000.00	Check	Accounts Payable
07/09/2026	29639	LAFCO Reversal	10,000.00	Check Reversal	Accounts Payable
07/09/2026	29639	LAFCO	-10,000.00	Check	Accounts Payable
07/09/2026	29640	Parkhouse Tire, Inc.	-850.21	Check	Accounts Payable
07/09/2026	29641	Sierra Analytical Labs, Inc	-587.50	Check	Accounts Payable
07/09/2026	29642	Starting Line Advisory	-3,611.25	Check	Accounts Payable
06/03/2026	DFT0003454	Frontier Communications	-131.57	Bank Draft	Accounts Payable
06/08/2026	DFT0003455	Frontier Communications	-108.78	Bank Draft	Accounts Payable
06/03/2026	DFT0003457	Southern California Edison	-2,142.58	Bank Draft	Accounts Payable
06/01/2026	DFT0003458	Southern California Edison	-348.43	Bank Draft	Accounts Payable
06/09/2026	DFT0003471	Frontier Communications	-231.45	Bank Draft	Accounts Payable
06/08/2026	DFT0003472	Southern California Edison	-24,205.66	Bank Draft	Accounts Payable
06/02/2026	DFT0003475	Verizon Wireless	-643.65	Bank Draft	Accounts Payable
06/03/2026	DFT0003478	Paymentech, LLC	-2,875.16	Bank Draft	Accounts Payable

Bank Transaction Report

Issued Date	Number	Description	Amount	Type	Module
06/25/2026	DFT0003479	Frontier Communications	-276.65	Bank Draft	Accounts Payable
06/25/2026	DFT0003480	Frontier Communications	-96.82	Bank Draft	Accounts Payable
06/03/2026	DFT0003481	Heritage Landscape Supply	-374.23	Bank Draft	Accounts Payable
06/03/2026	DFT0003482	On Line Information Services, Inc	-12.48	Bank Draft	Accounts Payable
06/03/2026	DFT0003483	O'Reilly Auto Parts	-795.09	Bank Draft	Accounts Payable
06/22/2026	DFT0003484	Southern California Edison	-1,856.71	Bank Draft	Accounts Payable
06/15/2026	DFT0003485	Southern California Edison	-357.94	Bank Draft	Accounts Payable
06/15/2026	DFT0003486	Southern California Edison	-101.65	Bank Draft	Accounts Payable
06/10/2026	DFT0003487	Southwest Gas Company	-11.00	Bank Draft	Accounts Payable
06/10/2026	DFT0003488	Southwest Gas Company	-32.46	Bank Draft	Accounts Payable
06/10/2026	DFT0003489	Southwest Gas Company	-21.81	Bank Draft	Accounts Payable
06/10/2026	DFT0003490	Southwest Gas Company	-142.53	Bank Draft	Accounts Payable
06/03/2026	DFT0003491	Ultimate Internet Access, Inc	-816.69	Bank Draft	Accounts Payable
06/03/2026	DFT0003492	Univar Solutions, USA	-2,775.47	Bank Draft	Accounts Payable
06/03/2026	DFT0003493	Paymentech, LLC	-545.85	Bank Draft	Accounts Payable
06/01/2026	DFT0003494	EVO Merchant Services	-2,201.75	Bank Draft	Accounts Payable
06/03/2026	DFT0003495	Sonic Systems, Inc	-2,151.60	Bank Draft	Accounts Payable
06/05/2026	DFT0003496	CalPERS - SIP 457	-7,157.22	Bank Draft	Accounts Payable
06/05/2026	DFT0003497	CalPERS MEDICAL	-9,393.86	Bank Draft	Accounts Payable
06/05/2026	DFT0003498	California State Disbursement Unit	-230.76	Bank Draft	Accounts Payable
06/05/2026	DFT0003500	CalPERS CLASSIC	-7,751.08	Bank Draft	Accounts Payable
06/05/2026	DFT0003502	CalPERS - PEPRA	-3,316.26	Bank Draft	Accounts Payable
06/05/2026	DFT0003503	TASC	-1,012.45	Bank Draft	Accounts Payable
06/05/2026	DFT0003504	Internal Revenue Service	-9,400.81	Bank Draft	Accounts Payable
06/05/2026	DFT0003505	Employment Development Center	-3,348.17	Bank Draft	Accounts Payable
06/10/2026	DFT0003520	Southwest Gas Company	-21.81	Bank Draft	Accounts Payable
06/10/2026	DFT0003521	Southwest Gas Company	-142.53	Bank Draft	Accounts Payable
06/10/2026	DFT0003522	Southwest Gas Company	-32.46	Bank Draft	Accounts Payable
06/10/2026	DFT0003523	Southwest Gas Company	-11.00	Bank Draft	Accounts Payable
06/10/2026	DFT0003524	Infosend, Inc	-52.00	Bank Draft	Accounts Payable
06/10/2026	DFT0003524	Infosend, Inc Reversal	52.00	Bank Draft Reve	Accounts Payable
06/10/2026	DFT0003525	Infosend, Inc	-2,096.86	Bank Draft	Accounts Payable
06/10/2026	DFT0003525	Infosend, Inc Reversal	2,096.86	Bank Draft Reve	Accounts Payable
06/04/2026	DFT0003526	CA Dept of Tax and Fee Administration	-1,976.34	Bank Draft	Accounts Payable
06/11/2026	DFT0003528	Lowe's Inc. Reversal	157.10	Bank Draft Reve	Accounts Payable
06/11/2026	DFT0003528	Lowe's Inc.	-157.10	Bank Draft	Accounts Payable
06/11/2026	DFT0003529	Zenith National Insurance Company	-8,762.00	Bank Draft	Accounts Payable
06/11/2026	DFT0003529	Zenith National Insurance Company Reversal	8,762.00	Bank Draft Reve	Accounts Payable
06/19/2026	DFT0003530	CalPERS - SIP 457	-7,157.22	Bank Draft	Accounts Payable
06/19/2026	DFT0003531	CalPERS MEDICAL	-9,214.73	Bank Draft	Accounts Payable
06/19/2026	DFT0003532	California State Disbursement Unit	-230.76	Bank Draft	Accounts Payable
06/19/2026	DFT0003533	Choice Builder	-983.05	Bank Draft	Accounts Payable
06/19/2026	DFT0003534	CalPERS CLASSIC	-7,751.08	Bank Draft	Accounts Payable
06/19/2026	DFT0003535	Hartford Life and Accident Insurance Company	-340.70	Bank Draft	Accounts Payable
06/19/2026	DFT0003536	CalPERS - PEPRA	-3,316.26	Bank Draft	Accounts Payable
06/19/2026	DFT0003537	TASC	-1,012.45	Bank Draft	Accounts Payable
06/19/2026	DFT0003538	Internal Revenue Service	-8,828.87	Bank Draft	Accounts Payable
06/19/2026	DFT0003539	Employment Development Center	-3,185.95	Bank Draft	Accounts Payable
06/10/2026	DFT0003540	Southern California Edison	-1,987.08	Bank Draft	Accounts Payable
06/10/2026	DFT0003541	Southern California Edison	-357.94	Bank Draft	Accounts Payable
06/10/2026	DFT0003542	Southern California Edison	-101.65	Bank Draft	Accounts Payable
06/10/2026	DFT0003543	Southern California Edison	-429.55	Bank Draft	Accounts Payable

Bank Transaction Report

Issued Date	Number	Description	Amount	Type	Module
06/10/2026	DFT0003544	Southern California Edison	-102.34	Bank Draft	Accounts Payable
06/17/2026	DFT0003547	Frontier Communications	-108.47	Bank Draft	Accounts Payable
06/17/2026	DFT0003549	FNBO	-75.01	Bank Draft	Accounts Payable
06/17/2026	DFT0003549	FNBO	-633.32	Bank Draft	Accounts Payable
06/17/2026	DFT0003549	FNBO	-792.07	Bank Draft	Accounts Payable
06/17/2026	DFT0003549	FNBO	-1,103.49	Bank Draft	Accounts Payable
06/19/2026	DFT0003553	Beck Oil Inc	-4,339.15	Bank Draft	Accounts Payable
06/17/2026	DFT0003554	Home Depot Credit Services	-3,338.31	Bank Draft	Accounts Payable
06/17/2026	DFT0003555	Orange County Winwater Works	-390.12	Bank Draft	Accounts Payable
07/06/2026	DFT0003556	Southern California Edison	-3,314.07	Bank Draft	Accounts Payable
07/01/2026	DFT0003557	Southern California Edison	-2,316.88	Bank Draft	Accounts Payable
06/23/2026	DFT0003558	County of San Bernardino, Environmental Health Services	-434.00	Bank Draft	Accounts Payable
07/08/2026	DFT0003560	Southern California Edison	-26,243.14	Bank Draft	Accounts Payable
06/23/2026	DFT0003561	Stericycle, Inc	-152.10	Bank Draft	Accounts Payable
06/23/2026	DFT0003562	Verizon Wireless	-685.03	Bank Draft	Accounts Payable
07/02/2026	DFT0003563	CalPERS - SIP 457	-7,157.22	Bank Draft	Accounts Payable
07/02/2026	DFT0003565	California State Disbursement Unit	-230.76	Bank Draft	Accounts Payable
07/02/2026	DFT0003567	CalPERS CLASSIC	-7,738.04	Bank Draft	Accounts Payable
07/02/2026	DFT0003569	CalPERS - PEPRA	-3,316.26	Bank Draft	Accounts Payable
07/02/2026	DFT0003570	TASC	-1,012.45	Bank Draft	Accounts Payable
07/02/2026	DFT0003571	Internal Revenue Service	-8,873.59	Bank Draft	Accounts Payable
07/02/2026	DFT0003572	Employment Development Center	-3,214.48	Bank Draft	Accounts Payable
07/03/2026	DFT0003573	O'Reilly Auto Parts	-770.41	Bank Draft	Accounts Payable
07/02/2026	DFT0003576	Allied Public Risk LLC	-5,331.00	Bank Draft	Accounts Payable
07/02/2026	DFT0003576	Allied Public Risk LLC	-19,910.75	Bank Draft	Accounts Payable
07/02/2026	DFT0003576	Allied Public Risk LLC	-5,331.00	Bank Draft	Accounts Payable
07/02/2026	DFT0003576	Allied Public Risk LLC	-19,910.75	Bank Draft	Accounts Payable
07/02/2026	DFT0003576	Allied Public Risk LLC	-5,167.00	Bank Draft	Accounts Payable
07/02/2026	DFT0003576	Allied Public Risk LLC	-5,331.00	Bank Draft	Accounts Payable
07/02/2026	DFT0003576	Allied Public Risk LLC	-5,167.00	Bank Draft	Accounts Payable
07/02/2026	DFT0003576	Allied Public Risk LLC	-5,167.00	Bank Draft	Accounts Payable
07/02/2026	DFT0003584	Allied Public Risk LLC	-19,913.75	Bank Draft	Accounts Payable
07/02/2026	DFT0003585	Ultimate Internet Access, Inc	-816.69	Bank Draft	Accounts Payable
07/02/2026	DFT0003586	Sonic Systems, Inc	-2,151.60	Bank Draft	Accounts Payable
07/08/2026	DFT0003593	Infosend, Inc	-2,148.86	Bank Draft	Accounts Payable
07/09/2026	DFT0003594	Home Depot Credit Services	-1,353.24	Bank Draft	Accounts Payable
07/09/2026	DFT0003595	Lowe's Inc.	-183.74	Bank Draft	Accounts Payable
07/09/2026	DFT0003596	On Line Information Services, Inc	-6.24	Bank Draft	Accounts Payable
07/09/2026	DFT0003600	Bank of America, N.A.	-6,914.63	Bank Draft	Accounts Payable
07/09/2026	DFT0003601	Corporate Payment Systems	-7,442.91	Bank Draft	Accounts Payable
07/09/2026	DFT0003602	Frontier Communications	-96.96	Bank Draft	Accounts Payable
				Bank Account 211102187 Total: (191)	**-930,945.76**
				Report Total: (191)	**-930,945.76**

Summary

Bank Account		Count	Amount
211102187 CBB Checking		191	-930,945.76
	Report Total:	**191**	**-930,945.76**

Cash Account		Count	Amount
No Cash Account		1	0.00
99 99-111000 Cash in CBB - Checking		190	-930,945.76
	Report Total:	**191**	**-930,945.76**

Transaction Type	Count	Amount
Bank Draft	97	-331,702.84
Bank Draft Reversal	4	11,067.96
Check	84	-621,929.53
Check Reversal	6	11,618.65
Report Total:	**191**	**-930,945.76**

Helendale CSD

Payable Register

Payable Detail by Vendor Name

Packet: APPKT6449 - 6-26-26 ELAN - TRAVELBANK

Payable # / Payable Description	Payable Type	Post Date / Bank Code	Payable Date	Due Date	Discount Date / On Hold	Amount	Tax	Shipping	Discount	Total
Vendor: 1705 - Corporate Payment Systems									Vendor Total:	7,442.91
7-8-26	Invoice	7/8/2026	7/8/2026	7/8/2026	7/8/2026	7,442.91	0.00	0.00	0.00	7,442.91
Misc Charges		AP - CBB Checking			No					

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
T-shirts	Amount	0.00	0.00	37.95	0.00	0.00	0.00	37.95

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
05-553300-00-0	Concert in the Park Expense		37.95	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Sympathy Card - J. Bonnie	Amount	0.00	0.00	2.16	0.00	0.00	0.00	2.16

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
10-526650-00-0	Community Promotion		2.16	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Coffee	Amount	0.00	0.00	17.76	0.00	0.00	0.00	17.76

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
03-553000-00-0	Operating Supplies		17.76	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Coffee	Amount	0.00	0.00	17.76	0.00	0.00	0.00	17.76

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
10-553000-00-0	Operating Supplies - Office		17.76	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Coffee	Amount	0.00	0.00	17.76	0.00	0.00	0.00	17.76

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
01-553000-00-0	Operating Supplies		17.76	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Coffee	Amount	0.00	0.00	17.76	0.00	0.00	0.00	17.76

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
02-553000-00-0	Operating Supplies		17.76	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Hose & Blade - Mower	Amount	0.00	0.00	239.02	0.00	0.00	0.00	239.02

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
05-545000-00-0	Vehicle Equipment / Maintenance		239.02	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Feather Flag	Amount	0.00	0.00	49.55	0.00	0.00	0.00	49.55

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
05-553300-00-0	Concert in the Park Expense		49.55	100.00%

Payable #	Payable Type	Post Date	Payable Date	Due Date	Discount Date	Amount	Tax	Shipping	Discount	Total
Payable Description	**Bank Code**				**On Hold**					

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Clip Boards	Amount	0.00	0.00	25.28	0.00	0.00	0.00	25.28

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
10-553000-00-0	Operating Supplies - Office		25.28	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Safety Pins	Amount	0.00	0.00	8.61	0.00	0.00	0.00	8.61

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
10-553000-00-0	Operating Supplies - Office		8.61	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Poster Board, Drawpies, Solar Lights, Pa…	Amount	0.00	0.00	1,878.58	0.00	0.00	0.00	1,878.58

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
05-553000-00-0	Operating Supplies - Park		1,878.58	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
NFL Flag Jersey & Standard Belt Kit	Amount	0.00	0.00	4,525.62	0.00	0.00	0.00	4,525.62

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
05-550001-00-0	Flag Football		4,525.62	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Kizzeloy 2 Pcs Referee Hat	Amount	0.00	0.00	51.69	0.00	0.00	0.00	51.69

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
05-550001-00-0	Flag Football		51.69	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
3 Pack Duct Tape & Folding Bench	Amount	0.00	0.00	251.76	0.00	0.00	0.00	251.76

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
05-550001-00-0	Flag Football		251.76	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
SmartSign	Amount	0.00	0.00	301.65	0.00	0.00	0.00	301.65

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
05-553000-00-0	Operating Supplies - Park		301.65	100.00%

Payable Summary

Type	Count	Gross	Tax	Shipping	Discount	Total	Manual Payment	Balance
Invoice	1	7,442.91	0.00	0.00	0.00	7,442.91	0.00	7,442.91
	Grand Total:	**7,442.91**	**0.00**	**0.00**	**0.00**	**7,442.91**	**0.00**	**7,442.91**

Account Summary

Account	Name		Amount
01-553000-00-0	Operating Supplies		17.76
		Total:	**17.76**

Account	Name		Amount
02-553000-00-0	Operating Supplies		17.76
		Total:	**17.76**

Account	Name		Amount
03-553000-00-0	Operating Supplies		17.76
		Total:	**17.76**

Account	Name		Amount
05-545000-00-0	Vehicle Equipment / Maintenance		239.02
05-550001-00-0	Flag Football		4,829.07
05-553000-00-0	Operating Supplies - Park		2,180.23
05-553300-00-0	Concert in the Park Expense		87.50
		Total:	**7,335.82**

Account	Name		Amount
10-526650-00-0	Community Promotion		2.16
10-553000-00-0	Operating Supplies - Office		51.65
		Total:	**53.81**

Helendale CSD

Payable Register
Payable Detail by Vendor Name
Packet: APPKT6400 - 6-9-26 FLAGSTAR

Payable # / Payable Description	Payable Type	Post Date / Bank Code	Payable Date	Due Date	Discount Date / On Hold	Amount	Tax	Shipping	Discount	Total

Vendor: 1623 - FNBO — **Vendor Total:** **2,603.89**

Payable #	Payable Type	Post Date	Payable Date	Due Date	Discount Date	Amount	Tax	Shipping	Discount	Total
Stmt 6-3-26 AA	Invoice	6/3/2026	6/3/2026	7/1/2026	6/3/2026	75.01	0.00	0.00	0.00	75.01

Charges for A. Aviles — AP - CBB Checking — No — **Payment Date:** 6/17/2026 — **Bank Draft:** DFT0003549

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Certified Mail for Legal Contract	Amount	0.00	0.00	11.03	0.00	0.00	0.00	11.03

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
10-553200-00-0	Postage & Delivery		11.03	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Snacks for Board Meeting	Amount	0.00	0.00	38.95	0.00	0.00	0.00	38.95

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
10-522510-00-0	Meeting Expense		38.95	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Fuel for WW truck	Amount	0.00	0.00	25.03	0.00	0.00	0.00	25.03

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
02-545001-00-0	Vehicle Fuel		25.03	100.00%

Payable #	Payable Type	Post Date	Payable Date	Due Date	Discount Date	Amount	Tax	Shipping	Discount	Total
Stmt 6-3-26 CC	Invoice	6/3/2026	6/3/2026	7/1/2026	6/3/2026	792.07	0.00	0.00	0.00	792.07

Charges for C. Carlson — AP - CBB Checking — No — **Payment Date:** 6/17/2026 — **Bank Draft:** DFT0003549

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Accuracy Test & Certificate	Amount	0.00	0.00	170.00	0.00	0.00	0.00	170.00

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
01-553000-00-0	Operating Supplies		170.00	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
CeilingFan & Control	Amount	0.00	0.00	175.07	0.00	0.00	0.00	175.07

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
04-541000-00-5	Operation & Maintenance - Wild Rd	5107	175.07	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Tri-State Registration: CC, BJ & RC	Amount	0.00	0.00	447.00	0.00	0.00	0.00	447.00

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
01-524500-00-0	Education and Training		447.00	100.00%

Payable #	Payable Type	Post Date	Payable Date	Due Date	Discount Date	Amount	Tax	Shipping	Discount	Total
Stmt 6-3-26 CV	Invoice	6/10/2026	6/10/2026	6/10/2026	6/10/2026	1,103.49	0.00	0.00	0.00	1,103.49

Charges for C. Vermette — AP - CBB Checking — No — **Payment Date:** 6/17/2026 — **Bank Draft:** DFT0003549

Notes: $177.50 - Public Notice from 2024 Past Due
$177.50 - Public Notice from 2024 Past Due
$246.00 - ESFR Public Notice from 2025 Past Due

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Portable Toilets for May Concert	Amount	0.00	0.00	257.50	0.00	0.00	0.00	257.50

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
05-553300-00-0	Concert in the Park Expense		257.50	100.00%

Payable #	Payable Type	Post Date	Payable Date	Due Date	Discount Date	Amount	Tax	Shipping	Discount	Total
Payable Description	**Bank Code**				**On Hold**					

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Concert Staff T-Shirts - Amazon	Amount	0.00	0.00	13.99	0.00	0.00	0.00	13.99

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
05-553300-00-0	Concert in the Park Expense		13.99	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Public Notice - Public Hearing	Amount	0.00	0.00	177.50	0.00	0.00	0.00	177.50

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
10-526601-00-0	Public Notices		177.50	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Public Notice - Public Hearing	Amount	0.00	0.00	177.50	0.00	0.00	0.00	177.50

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
10-526601-00-0	Public Notices		177.50	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Public Notice - Budget	Amount	0.00	0.00	231.00	0.00	0.00	0.00	231.00

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
10-526601-00-0	Public Notices		231.00	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Public Notice - ESFR (2025)	Amount	0.00	0.00	246.00	0.00	0.00	0.00	246.00

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
10-526601-00-0	Public Notices		246.00	100.00%

Payable #	Payable Type	Post Date	Payable Date	Due Date	Discount Date	Amount	Tax	Shipping	Discount	Total
Stmt 6-3-26 TM	Invoice	6/3/2026	6/3/2026	7/1/2026	6/3/2026	633.32	0.00	0.00	0.00	633.32
Charges for T. Martin	AP - CBB Checking				No	**Payment Date:** 6/17/2026		**Bank Draft:**		DFT0003549

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Water for Board	Amount	0.00	0.00	5.99	0.00	0.00	0.00	5.99

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
10-522510-00-0	Meeting Expense		5.99	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Water for Band	Amount	0.00	0.00	5.99	0.00	0.00	0.00	5.99

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
05-553300-00-0	Concert in the Park Expense		5.99	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Clean Up Tools	Amount	0.00	0.00	17.36	0.00	0.00	0.00	17.36

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
05-553300-00-0	Concert in the Park Expense		17.36	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Thrift Store Gift Cards	Amount	0.00	0.00	525.00	0.00	0.00	0.00	525.00

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
03-556800-00-0	EE Incentive Program		525.00	100.00%

Payable #	Payable Type	Post Date	Payable Date	Due Date	Discount Date	Amount	Tax	Shipping	Discount	Total
Payable Description	**Bank Code**				**On Hold**					

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Food for Band	Amount	0.00	0.00	28.98	0.00	0.00	0.00	28.98

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
05-553300-00-0	Concert in the Park Expense		28.98	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Bday Gift Card - C. Vermette	Amount	0.00	0.00	25.00	0.00	0.00	0.00	25.00

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
10-556800-00-0	Employee Morale		25.00	100.00%

Items

Item Description	Commodity	Units	Price	Amount	Tax	Shipping	Discount	Total
Bday Gift Card - G. Hardy	Amount	0.00	0.00	25.00	0.00	0.00	0.00	25.00

Distributions

Account Number	Account Name	Project Account Key	Amount	Percent
10-556800-00-0	Employee Morale		25.00	100.00%

Payable Summary

Type	Count	Gross	Tax	Shipping	Discount	Total	Manual Payment	Balance
Invoice	4	2,603.89	0.00	0.00	0.00	2,603.89	2,603.89	0.00
	Grand Total:	**2,603.89**	**0.00**	**0.00**	**0.00**	**2,603.89**	**2,603.89**	**0.00**

Project Summary

Project Number	Project Name	Count	Account Key	Account Name	Amount
5107	15425 Wild Road Property	1	5107	Repair & Maintenance: 15425 Wi...	175.07
				Project 5107 Total:	**175.07**
				Grand Total:	**175.07**

Account Summary

Account	Name		Amount
01-524500-00-0	Education and Training		447.00
01-553000-00-0	Operating Supplies		170.00
		Total:	**617.00**

Account	Name		Amount
02-545001-00-0	Vehicle Fuel		25.03
		Total:	**25.03**

Account	Name		Amount
03-556800-00-0	EE Incentive Program		525.00
		Total:	**525.00**

Account	Name		Amount
04-541000-00-5	Operation & Maintenance - Wild Rd		175.07
		Total:	**175.07**

Account	Name		Amount
05-553300-00-0	Concert in the Park Expense		323.82
		Total:	**323.82**

Account	Name		Amount
10-522510-00-0	Meeting Expense		44.94
10-526601-00-0	Public Notices		832.00
10-553200-00-0	Postage & Delivery		11.03
10-556800-00-0	Employee Morale		50.00
		Total:	**937.97**

Helendale Community Services District

26540 Vista Road, Suite C, Helendale, CA 92342

DATE: July 16, 2026
TO: Board of Directors
FROM: Cheryl Vermette, General Manager – Administration / Recreation
SUBJECT: Agenda item # 3C
Consent Items

CONSENT ITEMS:

C. May 2026 Financial Report

May 2026
Financial Reporting

Preliminary Results – Subject to Change

(Unaudited)

Prepared by

STARTING LINE ADVISORY

**No assurance is provided on the financial statements. The financial statements do not include a statement of cash flows. Substantially all disclosures required by accounting principles generally accepted in the United States are not included.*

Helendale CSD
Statement of Revenues & Expenses - Water
May 2026

		May 2026	YTD Actual	Budget	92% of Budget	PYTD
1	**Operating Revenues**					
2	Meter Charges	$ 136,027	$ 1,491,707	$ 1,632,679	91%	$ 1,466,875
3	Water Sales	69,408	808,072	840,792	96%	688,452
4	Standby Charges	492	19,330	26,220	74%	23,641
5	Other Operating Revenue	4,982	103,475	117,710	88%	93,359
6	**Total Operating Revenues**	**210,909**	**2,422,584**	**2,617,401**	**93%**	**2,272,327**
7	**Non-Operating Revenues**					
8	Grant Revenue	-	-	-	0%	-
9	Miscellaneous Income (Expense)	109,179	778,584	-	0%	-
10	**Total Non-Operating Revenues**	**109,179**	**778,584**	**-**	**0%**	**-**
11	**Total Revenues**	**320,089**	**3,201,168**	**2,617,401**	**122%**	**2,272,327**
12	**Expenses**					
13	**Salaries & Benefits**					
14	Salaries	41,686	445,729	511,480	87%	408,921
15	Benefits	17,919	174,034	202,810	86%	144,120
16	**Total Salaries & Benefits**	**59,605**	**619,763**	**714,290**	**87%**	**553,041**
17	**Transmission & Distribution**					
18	Contractual Services	6,054	53,560	57,975	92%	54,052
19	Power	15,763	224,705	224,405	100%	192,171
20	Operations & Maintenance	10,484	164,730	182,500	90%	144,775
21	Rent/Lease Expense	800	10,060	12,200	82%	10,796
22	Permits & Fees	-	27,696	40,225	69%	38,513
23	**Total Transmission & Distribution**	**33,101**	**480,751**	**517,305**	**93%**	**440,309**
24	**General & Administrative**					
25	Utilities	475	5,742	6,150	93%	3,579
26	Office & Other Expenses	156	1,876	4,193	45%	6,136
27	Admin Allocation	69,003	759,033	828,036	92%	626,839
28	**Total General & Administrative**	**69,634**	**766,651**	**838,379**	**91%**	**636,554**
29	Debt Service	23,707	346,309	346,309	100%	366,091
30	**Total Expenses**	**186,046**	**2,218,102**	**2,416,283**	**92%**	**1,995,995**
31	**Net Income (Loss) Before Other Items**	**134,042**	**983,066**	**201,118**		**276,332**
32	Sale or Lease of Water Rights	46,716	367,801	300,000	123%	274,890
33	Capital Expenses	(12,914)	(2,384,069)	(1,621,000)	147%	-
34	**Net Income (Loss)**	**$ 167,844**	**$ (1,033,203)**	**$ (1,119,882)**		**$ 551,222**

Helendale CSD
Financial Statement Analysis
May 2026 – 92% of Fiscal Year

Fund 01-Water Revenues and Expenses

Line 2 Meter Charges: Includes fixed monthly charge for water service. YTD is trending in line with target budget.

Line 3 Water Sales: Includes water consumption charges. YTD is trending over target budget due to higher consumption in the summer months.

Line 4 Standby Charges: Includes special assessment standby charges for the current & prior years and delinquent standby penalties. Most of these revenues are received in November, December, and April. YTD can trend over or under budget depending on timing of property tax receipts.

Line 5 Other Operating Revenue: Includes permit & inspection charges, connection fees, meter installation fees, other fees/charges, and mechanic service reimbursements. Connection and meter installation fees are budgeted conservatively due to the unexpected nature of these fees.

Line 8 Grant Revenue: Includes any grant funding received during the fiscal year.

Line 9 Miscellaneous Income (Expense): Includes gain or loss on sale of assets and other miscellaneous income. YTD activity includes receipt of PFAS settlement received for $172.2K in August, $368.2K in October, $126.3K in February and $109.2K in May.

Line 14 Salaries: Includes salaries for water employees.

Line 15 Benefits: Includes health insurance, CalPERS retirement, worker's compensation insurance, payroll taxes, and employee education and training.

Line 18 Contractual Services: Includes lab testing, engineering, geographic information system (GIS) support & other contract services.

Line 19 Power: Includes electricity usage for transmission & distribution. YTD is over target budget due to higher consumption and rate increases.

Line 20 Operations & Maintenance: Includes operations & maintenance expenses, uniforms, vehicle maintenance, and vehicle fuel. YTD can trend over/under budget due to need and the timing of services.

Line 21 Rent/Lease Expense: Includes rental costs for the water shop and Bureau of Land Management (BLM) tank sites.

Line 22 Permits & Fees: Includes all water permits, miscellaneous fees, and Watermaster fees. YTD can trend over/under budget due to the timing of permits and fee payments. Water System annual fees were paid in December.

Helendale CSD
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Line 25 Utilities (G&A): Includes gas and telephone expenses. YTD is trending in line with target budget.

Line 26 Office & Other Expenses: Includes mileage/travel reimbursements, office supplies, water conservation program, and dues/subscriptions. These expenses are on an as-needed basis and can trend over/under budget.

Line 27 Admin Allocation: This is the monthly distribution of the budgeted Administration Fund (Fund 10) expenses to the enterprise funds, of which water receives 50%.

Line 29 Debt Service: Includes interest & principal payments on outstanding debt. YTD can trend over/under budget due to the timing of payments. Payments on the CNB loan are made in December and June, while payments on the MFC loan are made in February and August.

Line 32 Sale or Lease of Water Rights: Includes water rights leases to the City of Victorville and Silver Lakes Association. YTD activity includes 147 AF Lease to Silver Lakes Association and Sale and lease of water rights to the City of Victorville.

Line 33 Capital Expenses: YTD balance in capital expenses includes the following:

- $9.4K – Interior Ops Building
- $14.6K – AMI Meters
- $2.3M - Water Rights Purchase
- $32.1K – Solar Roof Project
- $62.0K – Water Equipment – Trailer Purchase

Helendale CSD
Statement of Revenues & Expenses - Sewer
May 2026

		May 2026	YTD Actual	Budget	92% of Budget	PYTD
1	**Operating Revenues**					
2	Sewer Charges	$ 163,886	$ 1,799,723	$ 1,961,647	92%	$ 1,733,758
3	Standby Charges	477	15,658	24,510	64%	21,885
4	Other Fees & Charges	2,557	46,506	46,479	100%	32,913
5	Interfund Transfer In/(Out)	5,964	65,607	71,571	92%	-
6	Other Income/(Expense)	-	6,500	-	0%	-
7	**Total Revenues**	**172,884**	**1,933,994**	**2,104,208**	**92%**	**1,788,557**
8	**Expenses**					
9	**Salaries & Benefits**					
10	Salaries	32,517	344,363	446,410	77%	351,843
11	Benefits	15,277	132,677	156,051	85%	116,505
12	**Total Salaries & Benefits**	**47,794**	**477,040**	**602,461**	**79%**	**468,348**
13	**Sewer Operations**					
14	Contractual Services	1,633	77,578	135,335	57%	107,651
15	Power	10,485	128,927	144,150	89%	122,189
16	Operations & Maintenance	8,608	51,145	66,900	76%	60,301
17	Permits & Fees	-	37,435	44,300	85%	39,676
18	**Total Sewer Operations**	**20,726**	**295,085**	**390,685**	**76%**	**329,816**
19	**General & Administrative**					
20	Utilities	486	5,202	5,350	97%	4,902
21	Office & Other Expenses	769	13,229	15,960	83%	19,672
22	Admin Allocation	67,623	743,852	811,475	92%	614,302
23	**Total General & Administrative**	**68,877**	**762,284**	**832,785**	**92%**	**638,876**
24	Debt Service	51,061	102,123	102,123	100%	93,575
25	**Total Expenses**	**188,459**	**1,636,531**	**1,928,054**	**85%**	**1,530,615**
26	**Net Income (Loss) Before Other I**	**(15,575)**	**297,462**	**176,153**		**257,942**
27	Capital Expenses	(34,526)	(614,803)	(1,100,000)	56%	-
28	**Net Income (Loss)**	**$ (50,101)**	**$ (317,341)**	**$ (923,847)**		**$ 257,942**

Helendale CSD
Financial Statement Analysis
May 2026 – 92% of Fiscal Year

Fund 02-Sewer Revenues and Expenses

Line 2 Sewer Charges: Includes the monthly charge for sewer services. YTD is trending in line with target budget.

Line 3 Standby Charges: Includes special assessment standby charges for the current & prior years and delinquent standby penalties. Most of these revenues are received in November, December, and April.

Line 4 Other Fees & Charges: Includes permit & inspection charges, connection fees, other fees, and charges. YTD is over target budget due to conservative budgeting and unpredictable nature of these fees.

Line 5 Interfund Transfer In/(Out): This line includes the monthly repayment of the interfund loan from Sewer to Parks. YTD is trending in line with target budget due to higher than anticipated residential late fees.

Line 6 Other Income/(Expense): Includes gain or loss on sale of assets and other miscellaneous income. YTD activity includes the sale of a Dodge truck in July.

Line 10 Salaries: Includes salaries for all sewer employees.

Line 11 Benefits: Includes employee insurance, PERS retirement, workers compensation, payroll taxes, and education & training.

Line 14 Contractual Services: Includes lab testing, engineering, GIS support & other contractual services.

Line 15 Power: Includes electricity used for Sewer. YTD is trending slightly under target budget.

Line 16 Operations & Maintenance: Includes compost disposal, vehicle maintenance, vehicle fuel, uniforms, and small tools.

Line 17 Permits and Fees: Includes all annual permits and fees paid to the state. YTD is trending under target budget.

Line 20 Utilities (G&A): Includes gas, water, and telephone expenses. YTD is trending over target budget due to increased telephone charges.

Line 21 Office & Other Expenses: Includes mileage/travel reimbursements, office supplies, water conservation program, and dues & subscriptions. These expenses are on an as-needed basis and can trend over/under budget.

Line 22 Admin Allocation: This is the monthly distribution of the budgeted Administration Fund (Fund 10) expenses to the enterprise funds of which wastewater receives 49%.

Helendale CSD
Financial Statement Analysis
May 2026 – 92% of Fiscal Year

Line 24 Debt Service: Includes interest & principal payments on outstanding debt. YTD can trend over/under budget due to the timing of payments. Payments on the CNB loan occur bi-annually in December and June.

Line 27 Capital Expenses: YTD balance in capital expenses includes the following:

- $4.1K – BioFilter Rebuild TF#1 & TF#2
- $3.6K – Fine Bar Screen Replacement
- $536.7K – Tertiary Engineering
- $32.1K – Solar Roof Project
- $12.0K – Wastewater Treatment Plant Lighting
- $10.6K – Smithson Lift Station Pump #3
- $13.2K – Blower Room Electrical Upgrade
- $2.5K – Wastewater Maintenance Building Sprinkler System

Helendale CSD
Statement of Revenues & Expenses - Recycling Center
May 2026

		May 2026	YTD Actual	Budget	92% of Budget	PYTD
1	**Operating Revenues**					
2	Retail Sales	$ 23,777	$ 315,915	$ 300,000	105%	$ 274,890
3	Donations	-	1	-	0%	-
4	Board Discretionary Revenue	-	-	(9,000)	0%	-
5	Miscellaneous Income (Expense)	-	-	-	0%	-
6	**Total Revenues**	**23,777**	**315,916**	**291,000**	**109%**	**274,890**
7	**Expenses**					
8	**Salaries & Benefits**					
9	Salaries	16,240	196,290	206,964	95%	175,436
10	Benefits	3,357	38,012	44,604	85%	31,918
11	**Total Salaries & Benefits**	**19,597**	**234,302**	**251,568**	**93%**	**207,354**
12	**Recycling Center Operations**					
13	Contractual Services	-	198	2,500	8%	2,291
14	Operations & Maintenance	716	14,512	9,600	151%	8,938
15	**Total Recycling Center Operations**	**716**	**14,710**	**12,100**	**122%**	**11,228**
16	**General & Administrative**					
17	Utilities	1,176	14,783	14,500	102%	11,729
18	Office & Other Expenses	1	14,839	10,000	148%	7,789
19	**Total General & Administrative**	**1,177**	**29,622**	**24,500**	**121%**	**19,517**
20	**Total Expenses**	**21,490**	**278,634**	**288,168**	**97%**	**238,100**
21	**Net Income (Loss) Before Other Items**	**2,287**	**37,282**	**2,832**		**36,790**
22	Capital Expenses	-	-	-	-	-
23	**Net Income (Loss)**	**$ 2,287**	**$ 37,282**	**$ 2,832**		**$ 36,790**

Helendale CSD
Financial Statement Analysis
May 2026 – 92% of Fiscal Year

Fund 03-Recycling Center Revenues and Expenses

Line 2 Retail Sales: Includes sales revenues from the Thrift Store. YTD is trending over target budget due to increased sales.

Line 3 Donations: Donations are not budgeted due to the unexpected nature of these revenues.

Line 4 Board Discretionary Revenue: This line shows the transfer of net cash from the Recycling Center (Fund 03) to the Parks & Recreation Fund (Fund 05). This transfer is done at year-end for the audit.

Line 5 Miscellaneous Income/(Expense): Includes gain or loss on sale of assets and other miscellaneous income.

Line 9 Salaries: Salaries for all part-time recycling center employees and full-time supervisor. YTD is trending slightly over target budget due to increase in part-time wages.

Line 10 Benefits: Includes employee insurance, workers compensation, payroll taxes, and education & training. YTD is trending slightly under target budget.

Line 13 Contractual Services: Includes software support and other contract services. Services are on an as-needed basis. YTD can trend over/under budget due to the timing of services needed.

Line 14 Operations & Maintenance: Includes vehicle maintenance, vehicle fuel, operating supplies, and uniforms. YTD can trend over/under budget due to the timing of purchases as needed.

Line 17 Utilities (G&A): Includes electricity and telephone expenses. YTD is over target budget due to higher electricity and telephone expenses than anticipated in budget.

Line 18 Office & Other Expenses: Includes advertising, bank charges, and other miscellaneous expenses**.** YTD is over budget due to increased credit card fees.

Line 21 Net Income: Net income in the Recycling Center is moved to Parks & Recreation Fund (Fund 5) at year-end during the audit through Board Discretionary Revenue.

Line 22 Capital Expenses: There is no activity YTD.

Helendale CSD
Statement of Revenues & Expenses - Property Rental
May 2026

		May 2026	YTD Actual	Budget	92% of Budget	PYTD
1	**Operating Revenues**					
2	Property Rental Revenues	$ 11,639	$ 132,839	$ 146,388	91%	$ 134,135
3	Other Income	-	49	-	0%	-
4	Board Discretionary Revenue	-	-	-	0%	-
5	**Total Revenues**	**11,639**	**132,888**	**146,388**	**91%**	**134,135**
6	**Expenses**					
7	Contractual Services	-	6,460	10,000	65%	9,163
8	Utilities	1,001	9,530	14,376	66%	11,688
9	Operations & Maintenance	283	5,647	8,400	67%	12,284
10	Debt Service	26,544	53,088	53,088	100%	49,131
11	Capital Expenses	-	32,091	-	0%	-
12	**Total Expenses**	**27,828**	**106,815**	**85,864**	**124%**	**82,266**
13	**Net Income (Loss)**	**$ (16,189)**	**$ 26,073**	**$ 60,524**		**$ 51,869**

Helendale CSD
Financial Statement Analysis
May 2026 – 92% of Fiscal Year

Fund 04-Property Rental Revenues and Expenses

Line 2 Property Rental Revenues: Includes revenue for 15302 Smithson and 15425 Wild Road properties. YTD is trending in line with target budget.

Line 3 Other Income: Includes penalties and other miscellaneous income; due to the unexpected nature of these revenues these accounts are not budgeted.

Line 4 Board Discretionary Revenue: This line shows the transfer of net cash from the Property Rental Fund (Fund 04) to Parks & Recreation Fund (Fund 05) at year-end.

Line 7 Contractual Services: Includes contractor and handyman expenses for installation of appliances, drywall repair, roofing, or plumbing repairs. Services are on an as-needed basis. YTD can trend over/under budget due to the timing of services needed.

Line 8 Utilities: Includes electric & gas expenses for the rental properties. YTD is trending under target budget.

Line 9 Operations & Maintenance: Includes maintenance and other costs relating to the rental properties.

Line 10 Debt Service: Includes interest and principal payments on outstanding debt. YTD can trend over/under budget due to the timing of payments. Payments on the CNB loan occur bi-annually in December and June.

Line 11 Capital Expenses: YTD balance in capital expenses includes the following:

- $32.1K – Solar Roof Project

Helendale CSD

Statement of Revenues & Expenses - Parks & Recreation

May 2026

		May 2026	YTD Actual	Budget	92% of Budget	PYTD
1	**Operating Revenues**					
2	Program Fees	$ 6,117	$ 46,348	$ 37,900	122%	$ 30,238
3	Property Taxes	1,857	20,039	23,000	87%	21,075
4	Donations & Sponsorships	4,500	23,875	-	0%	-
5	Rental Income	3,669	30,922	23,575	131%	22,060
6	Developer Impact Fees	-	8,600	10,320	83%	6,304
7	Grants	-	-	-	0%	-
8	Interfund Transfer In/(Out)	(5,964)	(65,607)	(71,571)	92%	(65,580)
9	Board Discretionary Revenue	31,485	458,606	443,382	103%	421,331
10	Miscellaneous Income (Expense)	80	80	-	0%	-
11	**Total Revenues**	**41,743**	**522,864**	**466,606**	**112%**	**435,428**
12	**Expenses**					
13	**Salaries & Benefits**					
14	Salaries	541	15,998	38,246	42%	29,518
15	Benefits	41	2,113	5,925	36%	3,629
16	**Total Salaries & Benefits**	**582**	**18,111**	**44,171**	**41%**	**33,147**
17	Program Expense	2,789	78,313	75,475	104%	64,750
18	Contractual Services	10,126	88,330	107,960	82%	95,089
19	Utilities	2,825	42,240	57,838	73%	52,999
20	Operations & Maintenance	2,128	13,203	27,650	48%	27,295
21	Permits & Fees	-	1,185	1,733	68%	1,588
22	Other Expenses	-	483	900	54%	825
23	**Total Expenses**	**18,450**	**241,867**	**315,727**	**77%**	**275,693**
24	**Net Income (Loss) Before Other Items**	**23,293**	**280,998**	**150,879**		**159,735**
25	Capital Expenses	-	(88,736)	(119,000)	75%	-
26	**Net Income (Loss)**	**$ 23,293**	**$ 192,262**	**$ 31,879**		**$ 159,735**

Helendale CSD
Financial Statement Analysis
May 2026 – 92% of Fiscal Year

Fund 05-Parks & Recreation Revenues and Expenses

Line 2 Program Fees: Includes recreation program fees, basketball league fees, youth soccer league fees, and concert in the park vendor fees. YTD is over target budget due to higher Basketball and Youth Soccer league fees and Park Vendor fees that were not included in the budget.

Line 3 Property Taxes: Includes the transfer of property taxes for streetlight utility expenses.

Line 4 Donations & Sponsorships: Includes concert in the park sponsorships, event sponsorships, and other donations/sponsorships.

Line 5 Rental Income: Includes rental income from the water shop, community center room rental, and church rental. YTD activity is over target budget due to higher cheer camp receipts than budgeted, and the timing of the annual field rental paid in November.

Line 6 Developer Impact Fees: Includes park development impact fees charged for new developments. This account is budgeted based on known development. As such, this account will go over budget if more development takes place.

Line 7 Grant Revenue: There is no activity YTD.

Line 8 Interfund Transfer Out/(In): This line shows the year end transfer of cash balance from the Recycling Center (Fund 03) to the Parks & Recreation Fund (Fund 05), as well as the monthly repayment of the interfund loan from Sewer to Parks.

Line 9 Board Discretionary: Board Discretionary Revenue in December includes the following:

- Radio Tower Site Rent – $19,673
- Property Taxes – $5,728
- Solid Waste Franchise Fees – $7,941
- Transfer Property Tax Revenue for Street Light Utilities – $(1,857)

Line 10 Miscellaneous Income/(Expense): Includes gain or loss on sale of assets and other miscellaneous income.

Line 14 Salaries: Includes part-time Parks and Recreation employees. YTD is trending under target budget.

Line 15 Benefits: Includes worker's compensation insurance, payroll taxes, and employee education & training. YTD is trending under target budget in line with decreased salaries.

Helendale CSD
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Line 17 Program Expense: Includes supplies and expenses for the youth soccer league, park, community center, Farmer's Market, and other programs. YTD is over target budget due to timing of camps, program supplies, and concert expenses.

Line 18 Contractual Services: Includes software support and other contract services. These expenses are on an as-needed basis and can trend over/under budget.

Line 19 Utilities: Includes gas and electricity for parks and the community center, along with telephone & electricity for street lighting.

Line 20 Operations & Maintenance: Includes vehicle maintenance, small tools, vehicle fuel and building repair for the park and community center. YTD can trend over/under budget due to need and the timing of services.

Line 21 Permits & Fees: Includes permit and inspection fees, along with San Bernardino County fees.

Line 22 Other Expenses: Includes uniforms, printing costs, dues & subscriptions, and bank charges.

Line 25 Capital Expenses: YTD balance in capital expenses includes the following:

- $6.3K – Park Sound System
- $0.7K – Park Lighting North
- $49K – Solar Roof Project
- $11.2K – Park Door Locks
- $21.6K – Concerts in Park Sound System

Helendale CSD
Statement of Revenues & Expenses - Solid Waste Disposal
May 2026

		May 2026	YTD Actual	Budget	92% of Budget	PYTD
1	**Operating Revenues**					
2	Charges for Services	$ 63,782	$ 648,504	$ 699,201	93%	$ 608,289
3	Assessments & Fees	1,796	241,034	247,000	98%	224,582
4	Other Charges	3,164	34,784	31,549	110%	23,332
5	Grant Revenue	-	7,328	-	0%	-
6	Board Discretionary Revenue	-	-	-	0%	-
7	Miscellaneous Income (Expense)	-	-	-	0%	-
8	**Total Revenues**	**68,741**	**931,650**	**977,750**	**95%**	**856,204**
9	**Expenses**					
10	**Salaries & Benefits**					
11	Salaries	4,222	47,847	54,850	87%	47,266
12	Benefits	2,149	22,371	26,286	85%	18,612
13	**Total Salaries & Benefits**	**6,371**	**70,219**	**81,136**	**87%**	**65,878**
14	Contractual Services	63,523	627,210	717,673	87%	636,601
15	Disposal Fees	26,441	166,780	188,000	89%	158,520
16	Operations & Maintenance	174	10,939	3,100	353%	2,428
17	Other Operating Expenses	157	1,215	5,490	22%	4,664
18	Admin Allocation	1,380	15,181	16,561	92%	12,537
19	**Total Expenses**	**98,046**	**891,544**	**1,011,960**	**88%**	**880,629**
20	**Net Income (Loss) Before Other Items**	**(29,305)**	**40,107**	**(34,210)**		**(24,425)**
21	Capital Expenses	-	-	-	0%	-
22	**Net Income (Loss)**	**$ (29,305)**	**$ 40,107**	**$ (34,210)**		**$ (24,425)**

Helendale CSD
Financial Statement Analysis
May 2026 – 92% of Fiscal Year

Fund 06-Solid Waste Disposal Revenues and Expenses

Line 2 Charges for Services – Solid Waste: Includes regular pick up of solid waste. YTD is trending in line with target budget.

Line 3 Assessment & Fees: Includes special assessments for refuse land use fees for current & prior years. YTD can trend over/under budget due to the timing of receipts which are usually received in April and December.

Line 4 Other Charges: Includes delinquent fees and penalties on delinquent taxes. YTD is over target budget due to payments received in January.

Line 5 Grant Revenue: YTD balance consists of remaining CalRecycle grant proceeds used for dump hopper purchases.

Line 6 Board Discretionary Revenue: This is the amount that would be transferred in from discretionary funds if this fund operates at a deficit for the Fiscal Year.

Line 7 Miscellaneous Income (Expense): Includes gain or loss on sale of assets and other miscellaneous income.

Line 11 Salaries: Includes salaries for solid waste employees. YTD is trending slightly under target budget.

Line 12 Benefits: Includes employee insurance, CalPERS retirement, workers compensation, payroll taxes, and education & training. YTD is trending in line with target budget.

Line 14 Contractual Services: Includes Burrtec fees and other miscellaneous contract services. YTD can trend over/under budget due to need and the timing of services and fees.

Line 15 Disposal Fees: Includes San Bernardino County disposal fees and green waste disposal fees.

Line 16 Operations & Maintenance: Includes vehicle maintenance, vehicle fuel, operating supplies, and uniforms. YTD can trend over/under budget due to need and the timing of services. YTD is over budget due to dump hopper purchases which were funded by remaining CalRecycle grant proceeds.

Line 17 Other Operating Expenses: Includes rent for park storage, telephone, postage, event expenses, public outreach, printing, small tools, and bad debt expenses.

Line 18 Admin Allocation: This is the monthly distribution of the budgeted Administration Fund (Fund 10) expenses to the enterprise funds, of which solid waste receives 1%.

Helendale CSD
Statement of Revenues & Expenses - Administration
May 2026

		May 2026	YTD Actual	Budget	92% of Budget	PYTD
1	**Operating Revenues**					
2	Tower Rent	$ 19,673	$ 199,721	$ 188,563	106%	$ 182,260
3	Property Taxes	5,728	163,412	140,647	116%	115,202
4	Solid Waste Billing & Fees	15,669	199,366	215,712	92%	174,812
5	Fees & Charges	287	35,674	38,500	93%	26,115
6	Investment income	16,751	250,972	-	0%	73,304
7	Other Income	-	16,473	200	8236%	183
8	Board Discretionary Revenue	(33,342)	(478,645)	(434,382)	110%	(388,344)
9	**Total Revenues**	**24,766**	**386,972**	**149,240**	**259%**	**183,533**
10	**Expenses**					
11	**Salaries & Benefits**					
12	Salaries	31,015	708,480	700,027	101%	613,734
13	Benefits	19,251	327,250	372,016	88%	292,899
14	Directors' Fees	3,160	26,484	37,500	71%	43,524
15	**Total Salaries & Benefits**	**53,426**	**1,062,214**	**1,109,543**	**96%**	**950,158**
16	Contractual Services	3,846	281,105	281,540	100%	266,200
17	Insurance	-	122,926	153,079	80%	120,862
18	Utilities	1,456	20,119	21,360	94%	20,287
19	Operations & Maintenance	5,674	9,378	4,850	193%	4,719
20	Permits & Fees	953	12,118	11,000	110%	13,607
21	Office & Other Expenses	2,996	63,603	74,700	85%	88,753
22	Election Expense	-	-	-	0%	3,207
23	Administrative Allocation	(138,006)	(1,518,066)	(1,656,072)	92%	(1,253,678)
24	**Total Expenses**	**(69,654)**	**53,395**	**-**	**0%**	**214,114**
25	**Net Income (Loss) Before Capital**	**94,420**	**333,577**	**149,240**		**(30,581)**
26	Capital Expenses	-	(32,091)	-	0%	-
27	**Net Income (Loss) After Capital**	**$ 94,420**	**$ 301,486**	**$ 149,240**		**$ (30,581)**

Helendale CSD
Financial Statement Analysis
May 2026 – 92% of Fiscal Year

Fund 10-Administrative Revenues and Expenses

Line 2 Tower Rent: Includes radio tower site rental fees. YTD is trending over target budget due to timing of annual Metro PCS tower lease payment in January.

Line 3 Property Taxes: Includes current & prior property tax and penalties. YTD can trend over/under budget due to the timing of property tax collections, with a majority being received in December and April.

Line 4 Solid Waste Billing & Fees: Includes franchise fees and billing for solid waste. YTD is trending in line with target budget.

Line 5 Fees & Charges: Includes credit card processing fees and other miscellaneous fees. YTD is trending in line with target budget.

Line 6 Investment Income: Includes investment income and unrealized gain or loss on investments.

Line 7 Other Income: Other Income includes recycling revenues and other miscellaneous income. YTD activity includes Recycling Revenue received in November and December. YTD is over target budget due to recycling receipts that were not budgeted.

Line 8 Board Discretionary Income: Includes the transfer of the following for Parks and Recreation Fund (Fund 05):

- Radio Tower Site Rent – $19,673
- Property Taxes – $5,728
- Solid Waste Franchise Fees – $7,941

Line 12 Salaries: Includes full-time, part-time & overtime for administrative employees. YTD is over target budget due vacation leave cash out for retiring general manager.

Line 13 Benefits: Includes employee insurance, CalPERS retirement, workers compensation, payroll taxes, employee benefit & morale, and education & training. YTD is trending under target budget.

Line 14 Directors' Fees: Includes directors fees as well as directors training, seminars, and mileage expense. YTD is trending under target budget.

Line 16 Contractual Services: Includes software support, legal services, and auditing & accounting services. YTD is trending over target budget due to timing of FSA and Sonic Systems renewal fees and increased payment processing fees.

Line 17 Insurance: Includes both general liability and vehicle insurance expenses. YTD can trend over/under budget due to the timing of insurance renewals.

Helendale CSD
Financial Statement Analysis
May 2026 – 92% of Fiscal Year

Line 18 Utilities: Includes telephone and electricity expenses. YTD is trending in line with target budget.

Line 19 Operations & Maintenance: Includes vehicle maintenance, vehicle fuel, mileage & travel reimbursement, uniforms, and equipment maintenance. YTD can trend over/under budget due to need and the timing of services. YTD is over target budget due to parking lots repairs in May.

Line 20 Permits & Fees: Includes the annual LAFCO fees, the GFOA application fee for the budget award, and San Bernardino County fees. YTD is over target budget due to timing of annual LAFCO fees paid in July.

Line 21 Office & Other Expense: Includes board meeting supplies, public relations, community promotion, bank charges, office supplies, postage, and dues & subscription. YTD is trending under target budget.

Line 22 Election Expense: Includes the cost of elections.

Line 23 Admin Allocation: This is the monthly distribution of the budgeted Administration Fund (Fund 10) expenses to the enterprise funds.

Line 26 Capital Expenses: YTD balance in capital expenses includes the following:

- $32.1K – Solar Roof Project

Helendale Community Services District

26540 Vista Road, Suite C, Helendale, CA 92342

Date: July 16, 2026
TO: Board of Directors
FROM: Craig Carlson, General Manager Water/Parks
SUBJECT: Agenda item #5
Public Hearing to Receive Comments Regarding Possible Adoption of Resolution 2026-14: A Resolution of the Board of Directors of the Helendale Community Services District Authorizing the Establishment and Continuation of Collection of Water and Sewer Standby Charges for Fiscal Year 2027

Staff Recommendation

Staff recommends approval of Resolution 2026-14. Additionally, staff requests authorization to make any final adjustments based upon payments or other discovery prior to County submittal.

Staff Report

On, March 19, 2026, the Board of Directors approved the initiation of the collection of the standby fee. This is a procedural item that comes before the Board on an annual basis. The Collection of Standby Fees is a two-part process which includes the initiation of the process and then culminates in a public hearing and adoption of the proposed resolution approving the continuation of collection of the standby fees. Once approved by the Board, Staff prepares and submits the final list to the County Tax Collector by August 10th.

As a public agency and consistent with LAFCO 2996, the District is allowed to utilize the County property tax process for collection of various forms of debt and fees as the County had historically done prior to the formation of the District. This would include the annual collection of sewer and water standby fees. A standby fee could best be described as a fee for the availability of service. The fee is appropriate to offset the capacity in the system that is reserved for a specific parcel that pays the standby fee and cannot be allocated to another user. Most of these parcels have water and sewer service in close proximity of the property line and upon property development the service is available for connection to the parcel. The list of parcels who pay the standby fee is modified as new development occurs with in-fill lots within the Silver Lakes housing area.

The Water Standby Fee is based on the number of Equivalent Benefit Units (EBUs) assigned to each undeveloped parcel. Generally, one EBU is assigned for each of the first five acres, with additional fractional acreage assigned at one-half EBU per acre. Parcels of one acre or less are subject to a minimum annual fee of $30.

The current Standby Charge is $30 per EBU. Each parcel's annual Levy Amount is calculated by multiplying the parcel's total EBUs by the Standby Charge. The formulas below illustrate how EBUs and the annual Levy Amount are calculated.

Example: A 5.6-acre parcel is assigned 5 EBUs for the first five acres, plus 0.3 EBU for the remaining 0.6 acre (0.6 × 0.5), for a total of 5.3 EBUs. At $30 per EBU, the annual Levy Amount would be $159.

The engineer's report is attached for reference and provides a more detailed analysis of the fee. The estimated amount of standby fees the District will receive for fiscal year 2027 is an estimated $39,980.10.

FISCAL IMPACT:	Estimated revenue of $21,770.10 for water and $18,210 for wastewater.
POSSIBLE MOTION	None at this time.
ATTACHMENTS:	Resolution 2026-14 Water Standby Charges Wastewater Standby Charges Engineer's Report for Water and Sewer Standby Charges (FY2015)

RESOLUTION NO. 2026-14

A RESOLUTION OF THE BOARD OF DIRECTORS OF THE HELENDALE COMMUNITY SERVICES DISTRICT AUTHORIZING THE ESTABLISHMENT AND CONTINUATION OF COLLECTION OF WATER AND SEWER STANDBY CHARGES FOR FISCAL YEAR 2027

WHEREAS, the Helendale Community Services District ("the District") is a Community Services District organized and operating pursuant to Government Code 61000 et seq.

WHEREAS, the District is authorized by Government Code Section 61124(a) to impose standby charges for water services pursuant to the Uniform Standby Charge Procedures Act, Government Code Section 54984 et seq. ("the Act").

WHEREAS, under the Act, the District is authorized to fix before August 10 of any given year a water standby charge on land within its jurisdiction to which water service is made available for any purpose by the District, whether the water services are actually used or not.

WHEREAS, under the Act, the District's Board of Directors ("the Board") may establish schedules varying the charge according to land uses, benefit derived or to be derived from the use, availability of facilities to provide water service, the degree of availability or quantity of the use of the water to the affected lands, and may restrict the assessment to one or more improvement districts or zones of benefit established within the jurisdiction of the District, and may impose the charge on an area, frontage, or parcel basis, or a combination thereof.

WHEREAS, pursuant to Resolution No. 2951 of the Local Agency Formation Commission of the County of San Bernardino ("LAFCO"), the District is the successor agency to County Service Area 70, Improvement Zones B and C ("CSA 70 B&C").

WHEREAS, Condition No. 10 of LAFCO Resolution No. 2951 expressly states that "[a]ll previously authorized charges, fees, assessments, and/or taxes of [CSA 70 B&C] currently in effect shall be continued and assumed by the [District] as the successor agency in the same manner as provided in the original authorization pursuant to the provisions of Government Code Section 56886(t);"

WHEREAS, Government Code Section 56886(t) provides that LAFCO Resolution No. 2951 contains the exclusive terms and conditions for the change of organization from CSA 70 B&C to the District is it relates to the "extension or continuation of any previously authorized charge, fee, assessment, or tax by [the District as the] successor local agency in the affected territory."

WHEREAS, prior to the adoption of LAFCO Resolution No. 2951, the territory within the CSA 70

B&C was subject to water and sewer standby and availability charges that had been fixed, levied, and imposed upon such lands.

WHEREAS, the Board wishes to continue, extend, and assume all previously authorized water and sewer standby and availability charges that had been fixed, levied, and imposed upon lands within CSA 70 B&C.

WHEREAS, on July 16, 2026, at 6:00 p.m., at the District offices located at 26540 Vista Road, Suite C, Helendale, California, the Board held a public protest hearing to hear and consider any and all objections or protests regarding the imposition of the charge, which hearings were duly conducted in the manner set forth in the Act.

NOW, THEREFORE, BE IT RESOLVED by the Board of Directors of the Helendale Community Services District as follows:

1. The public interest and necessity requires the Board to adopt this Resolution hereby fixing, levying, imposing, and collecting water standby and availability charges on all properties within the District's jurisdictional boundaries where water is available in accordance with, and in the amounts set forth in, Exhibit "A" attached hereto and incorporated herein by this reference, pursuant to applicable law, including but not limited to the pertinent provisions of the Act, Condition No. 10 of LAFCO Resolution No. 2951, and/or Government Code Section 56886(t).

2. The public interest and necessity requires the Board to adopt this Resolution hereby fixing, levying, imposing, and collecting sewer standby and availability charges on all properties within the District's jurisdictional boundaries where sewer is available in accordance with, and in the amounts set forth in, Exhibit "B" attached hereto and incorporated herein by this reference, pursuant to applicable law, including but not limited to the pertinent provisions of the Act, Condition No. 10 of LAFCO Resolution No. 2951, and/or Government Code Section 56886(t).

3. The written protests received by the Board which were not withdrawn at the time of its determination represented less than fifteen percent (15%) of the parcels subject to the charges set forth herein.

4. The standby charges hereby levied by the Board are based upon the report of a qualified engineer, which is on file with the District. The content of said report are hereby adopted in full by the Board and are incorporated herein in full by this reference, including, but not limited to, any and all statements and determinations specifically relating to each of the following:

   a. A description of the charge and the method by which it is proposed to be imposed;
   b. A compilation of the amount of the charge proposed for each parcel subject to the charge;
   c. A statement of the methodology and rationale followed in determining the degree of benefit conferred by the service for which the proposed charge is made;

d. The District's legal ability to fix and adjust a standby charge, the amount of the proposed charge, and the properties affected thereby;

e. A description of the lands upon which the charge is proposed to be imposed; and

f. The amount of the proposed charge for each of the lands so described.

5. The Board hereby authorizes the District's General Manager to take any and all actions necessary to carry out the intent of the Board as set forth herein, and to cause the charges fixed and established herein to be collected at the same time, and in the same manner, as the levying of special assessments on the 2026-27 San Bernardino County Tax Roll, and/or to be otherwise collected in accordance with all legally-permissible methods available under applicable law.

6. If any charge hereby adopted becomes delinquent, the amount of the delinquency, together with any interest and penalties thereon, shall constitute a lien on the affected property to the fullest extent legally allowable under applicable law.

ADOPTED AND APPROVED this 16th day of July 2026, by the following vote:

AYES: _____
NOES: _____
ABSENT: _____
ABSTAIN: _____

By: ____
Ron Clark, President

ATTEST:

____
Cheryl Vermette, Clerk of the Board

Exhibit A
Water Standby Fee

5.6 Acres = 5 EBUs for the first five acres + 0.5 times the remaining fractional acreage of 0.6 = (0.5 x 0.6) = 0.3 EBUs Total EBUs = 5.3 EBUs

The total number of EBUs equals the sum of all EBUs assigned to Undeveloped Parcels. The existing Standby Charge, equal to $30 per EBU, is then applied to each parcel's individual EBUs to determine the parcel's proportionate benefit and total obligation. The following formulas are used to calculate each parcel's annual Levy Amount.

Standby Charge per EBU x Parcel's EBUs = Parcel's Levy

EXAMPLE:
5.6 Acres = $30 x 5.3 EBUs = $159
.5 Acres - $30 x 1EBU = $30
1 Acre = $30 x 1EBU - $30

Exhibit B
Sewer Standby Fee

5.6 Acres = 5 EBUs for the first five acres + 0.5 times the remaining fractional acreage of 0.6 = (0.5 x 0.6) = 0.3 EBUs Total EBUs = 5.3 EBUs

The total number of EBUs equals the sum of all EBUs assigned to Undeveloped Parcels. The existing Standby Charge, equal to $30 per EBU, is then applied to each parcel's individual EBUs to determine the parcel's proportionate benefit and total obligation. The following formulas are used to calculate each parcel's annual Levy Amount.

Standby Charge per EBU x Parcel's EBUs = Parcel's Levy

EXAMPLE:
5.6 Acres = $30 x 5.3 EBUs = $159
.5 Acres - $30 x 1EBU = $30
1 Acre = $30 x 1EBU - $30

FY 2027 Water Standby Charges			
0465251110000	2026	WC012-SW001	$30.00
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0467592050000	2026	WC012-SW001	$30.00
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Total			$21,770.10

FY 2027 Wastewater Standby Charges			
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Total			18,210.00

HELENDALE COMMUNITY SERVICES DISTRICT

ENGINEER'S REPORT
FOR FISCAL YEAR 2014-15
STANDBY CHARGE

FINAL DRAFT: OCTOBER 2014

BARTLE WELLS ASSOCIATES

Independent Public Finance Advisors
1889 Alcatraz Avenue
Berkeley, CA 94703-2714
Tel. 510.653.3399
Fax 510.653.3769
www.bartlewells.com

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AFFIDAVIT FOR THE ENGINEER'S REPORT: HELENDALE COMMUNITY SERVICES DISTRICT WATER STANDBY CHARGE

This Report describes the annual Standby Charge of the Helendale Community Services District (the CSD), which was initially formed by the County of San Bernardino as County Service Areas 70 B & C and assumed by the CSD as part of the reorganization pursuant to Condition 10 of LAFCO Resolution No. 2996, adopted June 21, 2006. This Report outlines the assessment methodology, affected parcels, and assessments to be levied for Fiscal Year 2014-2015. Reference is hereby made to the San Bernardino County Assessor's Maps for a detailed description of the lines and dimensions of parcels that are subject to the Standby Charge. The undersigned respectfully submits the enclosed Report as directed by the District's Board of Directors.

Dated this__________________day of______________,2014.

By:______________________________
Kimberly Cox, General Manager

By:______________________________
Douglas Dove, PE, CIPFA
President/Principal

OVERVIEW

Pursuant to the provisions the Uniform Standby Charge Procedures Act (Gov. Code, §§ 54984-54984.9; "Act"), public agencies may set a water and/or sewer standby charge each year for making infrastructure available to property whether the services are used or not. (§ 54984.2.) On November 5, 1996, the electorate adopted an initiative measure ("Proposition 218"), amending the California Constitution by adding articles XIII C and XIII D. Under article XIII D, new limitations and procedural requirements for assessments on real property were established and Section 6.b.4 of Article XIII D specifically states:

> *"Standby Charges, whether characterized as charges or assessments, shall be classified as assessments and shall not be imposed without compliance with Section 4."*

However, notwithstanding the following, any assessment/standby charge that was in effect prior to the effective date of Proposition 218 that was imposed exclusively to finance the capital costs or maintenance and operation expenses for sidewalks, streets, sewer, water, flood control, drainage systems or vector control shall be exempt from the procedures and approval process set forth in Section 4. Therefore, the CSD's existing standby charge is not required to re-notice and undergo a Proposition 218 Majority Protest Balloting, unless the CSD wishes to increase the standby charge above its current rate.

Accordingly, the CSD is authorized by law to provide water and sewer service, and may fix, before August 10 of any given year, a water and/or sewer standby charge, on land within the jurisdiction of the CSD to which water and/or sewer services are made available for any purpose by the CSD, whether the water or sewer service is actually used or not.

Upon approval and adoption of the annual standby charge by the CSD Board of Directors, the standby charges for Fiscal Year 2014-2015 shall be submitted to the San Bernardino County Auditor/Controller for inclusion on the property tax roll for each parcel.

For the purposes of this Report, the word "parcel" refers to an individual property assigned its own Assessor Parcel Number by the San Bernardino County Assessor's Office.

HISTORICAL BACKGROUND AND CURRENT LEGISLATION

In November 1996, California voters approved Proposition 218 that established specific requirements for the ongoing imposition of taxes, assessments and fees. The provisions of the Proposition are now contained in the California Constitutional Articles XIIIC and XIIID. All assessments described in this Report and approved by the District Board of Directors are prepared in accordance with Uniform Standby Charge Procedures Act (the "Act"), LAFCO Resolution No. 2996 and in compliance with the provisions of the Constitution.

Pursuant to the Article XIIID Section 5 of the Constitution, certain existing assessments and, in this case, standby charges, were exempt from the substantive and procedural requirements of the Article XIIID Section 4. Therefore, a property owner balloting is not required until such time that a new or increased standby charge is proposed. At this time, the CSD does not intend to increase the existing standby charge and this Engineer's Report is in connection with the continued collection of the current standby charge for Fiscal Year 2014-2015.

The standby charge of the CSD may be used for any purpose pursuant to the Act, commencing with Government Code Section 54984.2, whether the water and/or sewer service is actually used or not. The standby charge may also vary according to land uses, benefit derived or to be derived from the use or availability of facilities to provide water, or the degree of availability or quantity of the use of the water to the affected lands. The charge may be imposed on an area, frontage, or parcel basis, or a combination thereof.

> *The exiting standby charge methodology is employed throughout the CSD service area and is only levied against undeveloped parcels to provide equity between existing ratepayers and future customers that are not currently connected to the system by charging a portion of the cost to maintain the water and sewer system to undeveloped parcels that have the potential to develop in the future.*

Based on the FY2014-15 budget the existing standby charge for water is estimated to generate $30,500 annually in comparison to an annual budget for the Water Enterprise Fund in excess of $1.8 Million. The existing standby charge for wastewater generates $24,000 annually in comparison to an annual budget for the Wastewater Enterprise Fund in excess of $1.3 Million.

WATER AND SEWER SERVICES

DESCRIPTION OF CSD

The CSD is located in the High Desert area of San Bernardino County between Barstow and Victorville and has an estimated population of 6,000. The CSD's existing water and sewer service area is approximately five square miles while the District's boundary encompasses more than 100 square miles. The CSD provides water and sewer service to over 2,800 service connections. Over 90 percent of water and sewer connections service single-family residences. The CSD has not experienced much growth in recent years; however, the area has a potential for growth as there are approximately 728[1] undeveloped water parcels and 720[1] undeveloped sewer parcels that may be developed in the future in addition there is significant developer interest in the area as evidenced by the draft Specific Plan that was completed by San Bernardino County Land Use Services in January 2011. This potential development at build-out could generate up to 756[2] new water and 737[2] new sewer connections.

In general, the CSD provides for the continued delivery of water and wastewater service to its service area, including the operation, maintenance, servicing, repair and rehabilitation, and expansion of water and sewer facilities. These services are required and provide a special benefit to parcels that are not currently developed and connected to the water and sewer systems as facilities must be available for the orderly development of such properties. Therefore, many public agencies impose a water and sewer standby charge against undeveloped parcels until such time that the property is developed and connected to the existing infrastructure as a ratepayer. Standby charges provide a means to charge undeveloped parcels a proportional share of the cost of the utility that provides a special benefit to undeveloped parcels, including, but not limited to, water and sewer service, repair and replacement of existing facilities, new capital improvements, and operations.

[1] Undeveloped water and sewer parcel information provided in e-mail from Kimberly Cox, 10/2/2014

[2] New water and sewer connections estimated by the ratio of current connections to current built properties

METHOD OF APPORTIONMENT

BENEFIT ANALYSIS

Similar to many other public water and sewer entities in the State, standby charges provide a means to charge undeveloped parcels a proportional share of the cost of the water utility as a means to spread water and sewer service costs between existing ratepayers and undeveloped parcels, which will generate future customers as parcels are developed. Water and sewer services not only provide a direct benefit to existing customers, but it also provides a special benefit to undeveloped parcels as the CSD continues to provide service now and into the future through the ongoing operations of sewer collection and treatment, water resource management, water production, water quality, and the repair, replacement and expansion of related capital improvements. Most importantly, a standby charge reserves capacity in the existing system for the perspective development.

As previously referenced under the earlier Section of the Engineer's Report entitled "Overview," a standby charge is considered an assessment under the provisions of Article XIIID of the State Constitution. Therefore, all parcels which will have a special benefit conferred upon them and upon which the standby charge will be imposed must be identified (the Assessment Roll). The proportionate special benefit derived by each identified parcel shall be determined in relationship to the entirety of the costs of the capital water improvement, the maintenance and operation expenses of such improvement, and the cost of the property-related service being provided. In addition, no standby charge shall be imposed on any parcel which exceeds the reasonable cost of the proportional special benefit conferred on that parcel. In addition to the elements identified above, the standby charge of the CSD may also be used for any purpose pursuant to the Act, commencing with Government Code Section 54984.2. Therefore, the CSD may use standby charge revenue to fund any portion of its annual water and sewer budget. However, as the standby charge is only levied against undeveloped property and has not been increased since the original formation, the CSD's annual expenses for water and sewer services far exceeds revenue generated by the Standby Charge.

ASSESSMENT METHODOLOGY

The current standby charge was originally established by the County of San Bernardino and transferred to the CSD through the LAFCO proceedings that created the CSD. More specifically, Condition 10 of LAFCO Resolution No. 2996 specifically states: "All previously authorized charges, fees, assessments, and/or taxes ….. in effect shall be continued and assumed by the Helendale Community Services District as the successor agency in the same manner as provided in the original authorization pursuant to the provisions of Government Code Section 56886(t)." The CSD does not intend to change the assessment methodology nor increase the existing standby charge; therefore, the continued collection of the current standby charge is in compliance with the Act and Article XIIID of the State

Constitution.

The benefit formula used for apportioning cost over affected parcels reflects the composition of the parcels and the water and sewer services provided. Therefore, as undeveloped parcels are the only parcels subject to the existing standby charge, the most appropriate allocation basis to use to fairly apportion the costs based on the special benefits to each assessable parcel is by assigning Equivalent Benefit Units (EBU's) to each parcel based on the lot size of such parcel. Only undeveloped parcels with water and sewer service readily available to the parcel are assessed. In determining access, the original criterion established for determining development potential is property within 660 feet of a water main. In addition, billable acreage excludes territory of a parcel that cannot access water or sewer services due to unique circumstances, such as, railroad or road impediments, pressure breaks, and drainage easements or other types of easements that restrict the parcel's access to water and sewer services.

EQUIVALENT BENEFIT UNITS

To assess benefits equitably it is necessary to relate each property's proportional special benefits to the special benefits of all other properties that are subject to the Standby Charge. The method of apportionment most commonly used for assessments/standby charges is based on a weighted method of apportionment known as an Equivalent Benefit Unit (EBU) methodology. This proportional weighting may be based on several factors that may include, but are not limited to: the type and status of development (land use), size of the property, location of the property, parcel frontage, or other property related factors. In the case of the Helendale Community Services District, 1 EBU is equal to one acre and the standby charge is assessed only against unimproved property.

The assessable land area of a parcel reflects the development potential of a parcel and the special benefit that the parcel would receive from the water and sewer services. The total number of EBUs assigned to each parcel equals 1 EBU per lot up to one acre in size plus 0.5 EBUs per acre for each fraction of an acre, with a minimum assignment of 1 EBU to assessable parcel.

The following formulas are used to calculate each parcel's EBUs and the total EBUs that are assessed the standby charge:

Parcel's EBUs =1 EBU minimum up to one Billable Acre and 0.5 EBUs x fractional Billable Acreage

EXAMPLE:

> 5.6 Acres = 5 EBUs for the first five acres + 0.5 times the remaining fractional acreage of 0.6 = (0.5 x 0.6) = 0.3 EBUs Total EBUs = 5.3 EBUs

The total number of EBUs equals the sum of all EBUs assigned to Undeveloped Parcels. The existing Standby Charge, equal to $30 per EBU, is then applied to each parcel's individual EBUs to determine the parcel's proportionate benefit and total obligation. The following formulas are used to calculate each parcel's annual Levy Amount.

Standby Charge per EBU x Parcel's EBUs = Parcel's Levy

EXAMPLE:

> 5.6 Acres = $30 x 5.3EBUs = $159
>
> .5 Acres - $30 x 1EBU = $30
>
> 1 Acre = $30 x 1EBU - $30

DISTRICT BUDGET FISCAL YEAR 2014-2015

The following provides the preliminary proposed budget of the Water and Sewer Enterprise Fund for Fiscal Year 2014-2015. The budget includes the District's estimate of anticipated expenditures associated with the water utility. Pursuant to Section 54984.2 of the Act, the Standby Charge may fund any expenditure type of the proposed budget.

Table 1
Helendale Community Services District
Preliminary Fiscal Year 2014-2015 Budget

Operating Expenses	Water	Sewer
Water Purchases	70,000	NA
Salaries & Benefits	414,984	286,612
Board Compensation	0	0
Professional Fees	33,500	72,500
Service and Supplies	221,900	142,250
Utilities	152,500	104,500
Sub-Total	**892,884**	**605,862**
Non-Operating Expenses		
Debt	395,252	54,374
Administration, taxes, etc.	265,582	324,601
Sub-Total	**660,834**	**378,975**
Depreciation Expenses		
Depreciation/Amortization	247,677	382,924
TOTAL	**$1,801,395**	**1,367,761**

In determining the portion of the budget that may be funded by the standby charge, Bartle Wells Associates reviewed the CSD's Capital Improvement Program and the CSD's 2012 Water and Sewer Fee Study. Based on the total growth potential of the CSD[3], it is projected that the CSD will add approximately 756 new water connections (1017 New EBUs) and 737 new sewer connections (800 New EBUs) through buildout. This growth potential will represent 20.94% (756 new water connections/3612 total water connections) of the CSD's total water service demand and 20.89% (737 new sewer connections/ 3529 total sewer connections) of the CSD's sewer service demand. Therefore, the portion of the CSD's budget that is authorized to be funded by the Standby Charge and represents the special benefit conferred on undeveloped water property and sewer property is $377,169 (20.94% x $1,801,395) and $285,777 (20.89% x $1,367,761) the special benefit conferred by undeveloped sewer property. The 20.94% of total water demand and 20.89% of total sewer demand at buildout that is expected to be generated from future customers shall be updated at least every five years or at the same time that the CSD's Connection Fee Study is updated.

[3] Future Connections estimated by Helendale Community Services District. Estimated EBUs are based on annual assessment tax revenues divided by annual assessments ($30 per water EBU and $30 per sewer EBU).

Based on the allocated expenses for the water and sewer enterprise funds of $377,169 and $285,777 respectively, the maximum standby charge per water and sewer EBU would be equal to $370.98 and $357.22 for Fiscal Year 2014-2015 ($377,169 / 1016.67 EBUs[3] = $370.98 per EBU) and ($285,777 / 800 EBUs[3] = $357.22 per EBU). However, the current rate of $30 per EBU may not be increased without a majority protest ballot proceeding pursuant to Article XIIID Section 4(d) of the State Constitution. The CSD does not intend to increase the existing standby charge at this time and will continue to levy and collect the current standby charge for Fiscal Year 2013-2014.

DISTRICT BOUNDARY DIAGRAMS

The boundaries subject to the standby charge are equivalent to the existing water and sewer service area of the CSD and, by reference are hereby made part of this Engineer's Report. However, only undeveloped parcels within 66 feet of existing water and sewer infrastructure are subject to the Standby Charge. For more detailed specifications on the CSD's service area, diagrams are available for inspection at the administration office during normal business hours.

2014-2015 ASSESSMENT ROLL

Parcel identification, for each lot or parcel subject to the standby charge, shall be the parcel as shown on the San Bernardino County Assessor Parcel Maps and/or the San Bernardino County Secured Tax Roll for the year in which this Report is prepared. The proposed standby charge for each parcel has been prepared in accordance with the original rate established as part of the original formation and the method of apportionment described in this report and has been presented to the Board of Directors.

The standby charge information for each parcel as outlined in this Engineer's Report and confirmed by the District Board, shall be submitted to the County Auditor/Controller, and included on the property tax roll for Fiscal Year 2014-2015. If the parcels referenced by this Engineer's Report are renumbered, reapportioned or changed by the County Assessor's Office after approval of the Report, the new parcel(s) with the appropriate standby charge amount will be submitted to the County Auditor/Controller.

The Assessment roll includes parcels for the water standby fee and parcels for the sewer standby fee. The Assessment Roll has been provided to the Board under separate cover and is on file at the District Office and is made part of this Engineer's Report by reference.

Helendale Community Services District

26540 Vista Road, Suite C, Helendale, CA 92342

Date:	July 16, 2026
TO:	Board of Directors
FROM:	Cheryl Vermette, General Manager – Administration / Recreation
SUBJECT:	Agenda item #6 Public Hearing to Receive Comments Regarding Possible Adoption of Resolution 2026-15: A Resolution of the Board of Directors of the Helendale Community Services District Confirming, or Modifying and Then Confirming, the Report of Delinquent Water, Sewer and Trash Collection User Charges for the Purpose of Collecting Said Charges on the San Bernardino County Tax Roll

Staff Recommendation

Staff recommends approval of Resolution 2026-15. Additionally, staff requests authorization to make any final adjustments based upon payments or other discovery prior to County submittal.

Staff Report

Government agencies have the ability to place delinquent accounts on to the County tax rolls on an annual basis. Staff must provide a list of parcel numbers with the amount in arrears to the County Assessor Tax Collector no later than August 10 of each year. To date there are 32 parcels with outstanding balances. The estimated total amount that is delinquent is $71,741.49. A list of the affected parcels is attached to this staff report. A letter was sent to each property owner in July notifying them of this pending action. The District has placed a lien on the various parcels related to the delinquent amount but has not received payment. Typically, payment from liens is collected when the house has sold or refinanced. Placing the overdue amount onto the County tax bill improves the chances of collection.

The attached Resolution 2026-15 describes the authority of the District to place delinquent accounts for services onto the County tax bill. Copies of the resolution and the accompanying reports and list of parcels are to be forwarded to the County Assessor/Tax Collector and to the Auditor Controller by no later than August 10, 2026.

At the public hearing, the Board will hear and consider any and all objections or protests to the placement of the delinquent charges for service for water, sewer and trash collection on the San Bernardino County tax bill. Customers have until August 1, 2026 to make their payment to avoid charges being placed on the property tax roll.

Fiscal Impact: Estimated collection of past due fees of $71,741.49

Possible Motion: Approve Staff recommendation and adopt Resolution 2026-15.

Attachments: Spreadsheet of delinquent amounts by APN to tax rolls

Resolution 2026-15

Sample Letter

Account Number	Balance
12-1597-02	$ 8,394.52
12-1178-01	$ 4,532.00
12-1936-00	$ 4,531.96
12-1430-03	$ 4,441.28
12-2654-03	$ 4,370.69
12-2541-01	$ 3,980.64
12-2273-03	$ 3,488.29
12-1275-02	$ 3,027.64
12-1706-01	$ 3,020.29
12-3491-06	$ 3,013.67
12-3763-04	$ 3,001.88
12-2236-06	$ 2,215.26
12-2482-04	$ 2,195.26
12-1775-03	$ 1,780.66
12-3413-01	$ 1,726.56
12-3769-04	$ 1,638.53
12-1043-04	$ 1,310.24
12-2080-04	$ 1,299.38
12-3221-01	$ 1,278.59
12-3468-02	$ 1,143.56
12-2143-02	$ 1,127.79
12-2869-03	$ 1,068.28
12-2523-01	$ 1,048.88
12-2460-01	$ 1,048.59
12-3396-05	$ 991.37
12-3157-12	$ 965.07
12-3402-05	$ 916.42
12-1653-03	$ 906.92
12-1594-12	$ 855.80
12-1943-03	$ 822.25
12-3907-01	$ 805.63
12-3894-00	$ 793.59
Total	$ 71,741.49

RESOLUTION NO. 2026-15

A RESOLUTION OF THE BOARD OF DIRECTORS OF THE HELENDALE COMMUNITY SERVICES DISTRICT CONFIRMING, OR MODIFYING AND THEN CONFIRMING, THE REPORT OF DELINQUENT WATER, SEWER AND TRASH COLLECTION USER CHARGES FOR THE PURPOSE OF COLLECTING SAID CHARGES ON THE SAN BERNARDINO COUNTY TAX ROLL

WHEREAS, the Helendale Community Services District ("District") is a community services district organized and operating pursuant to California Government Code 61000 et seq.; and,

WHEREAS, Section 61115(b) of the Government Code authorizes the District's Board of Directors ("Board") to provide that any charges and penalties may be collected on the tax roll in the same manner as property taxes; and,

WHEREAS, Section 61115(b) of the Government Code provides that the District's General Manager must prepare and file with the Board a report that describes each affected parcel of real property and the amount of charges and delinquencies for each affected parcel for the year; and

WHEREAS, Section 61115(b) of the Government Code further provides that the District's General Manager must publish notice of the time and place for a public hearing by the Board to hear and consider adoption and/or revision of the charges and penalties contained in the report of the District's General Manager; and,

WHEREAS, the Board of Directors of the Helendale Community Services District Finds and Determines:

1. That the report of the District's General Manager on delinquent and unpaid charges for water, sewer and trash collection services within the District that remain unpaid and delinquent for sixty (60) days or more on July 1, 2026, which is attached hereto and incorporated herein by this reference, is hereby adopted and approved by the Board and confirmed for each parcel of property with the District as set forth in said report.
2. That a public hearing on said report was held on this date and that any protests or objections regarding the appropriateness of the charges or their collection on the tax roll were heard and considered by the Board.

NOW THEREFORE, that the Board, acting in its capacity as the governing body of the District, hereby resolves and orders:

1. That the General Manager is hereby directed to forward a certified copy of this resolution and accompanying reports to each of the following public bodies and officers:
    a. The Auditor/Controller of the County of San Bernardino;
    b. The Treasurer-Tax Collector of the County of San Bernardino;

2. That the unpaid delinquent charges for each corresponding parcel of property within the District identified in the attached report of the District's General Manager, as confirmed by the Board, are fixed in the amount set forth in said report and shall be collected on the tax roll in the same manner and at the same time as general County ad valorem property taxes are collected for fiscal year 2026-27.

Resolution 2026-15 is hereby approved and adopted by the Board of Directors of the Helendale Community Services District at a regular meeting held on July 16, 2026, by the following vote:

AYES: _____
NOES: _____
ABSENT: _____
ABSTAIN: _____

____
Ron Clark, President

____
Cheryl Vermette, Clerk of the Board

Helendale Community Services District

26540 Vista Road, Ste.B | PO Box 359 | Helendale, California 92342
(760) 951-0006 Fax (760) 951-0046

CUSTOMER NAME
CUSTOMER ADDRESS
City, State, Zip

7/9/2026

Re: **Delinquent Balance**
PROPERTY ADDRESS Helendale CA 92342
Account #12-XXXX-XX

Dear Customer:

This letter is to advise you that our records indicate the above account is seriously past due. As of 7/1/26 the outstanding balance is **$X,XXX.XX**.

You are encouraged to make your monthly payments on time to avoid penalties and other fees. We would like to give you the opportunity to bring your account current.

If the outstanding balance is not paid by 8/1/26 all unpaid balances will be added to the annual taxes levied upon the property. This could result in a higher monthly mortgage payment if your property taxes are imported.

See reverse side of this letter for important information regarding collection of outstanding balances.

Customer Service

Our records indicate that you own one or more parcels with an outstanding balance due that is subject to collection through the following means.

NOTICE

NOTICE IS HERBY GIVEN that the General Manager of the Helendale Community Services District ("District") has filed a report with the District's Board of Directors that describes the amount of unpaid charges and delinquencies for each affected parcel within the District, and that the District's Board of Directors will hold a public hearing to consider adoption of a resolution adding such delinquent non-paid charges to the annual taxes levied upon the property for which the charges are delinquent and unpaid.

The hearing will be held at a regular meeting of the District's Board of Directors scheduled for July 16, 2026, at 6:00 p.m., at the Helendale Community Services District Community Center building at 26540 Vista Rd., Suite C, Helendale, California. All interested persons are invited to attend the meeting and submit oral and/or written comments to the District's Board of Directors at the time of the hearing. All persons are further invited to review the report and proposed resolution, copies of which will be available for public inspection beginning ten (10) days prior to the above meeting, during regular business hours at the District's headquarters located at 26540 Vista Rd., Suite B, Helendale, California.

For more information, you may contact District staff at the headquarters address listed above, or by telephone at (760) 951-0006, during regular business hours.

Helendale Community Services District

26540 Vista Road, Suite C, Helendale, CA 92342

Date: July 16, 2026

TO: Board of Directors

FROM: Alex Aviles, General Manager Wastewater/Solid Waste

SUBJECT: Agenda item #9
Discussion and Possible Action Regarding Election of Officer for the California Special Districts Association (CSDA) Board of Directors Seat C-Southern Network

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STAFF RECOMMENDATION:

This matter is at the discretion of the Board.

STAFF REPORT:

Every two years the Board has the opportunity to select a candidate to represent the region on the CSDA Board of directors. CSDA is the primary professional organization that the District is a member of and the Board participates in due to cost considerations. The annual dues payment is approximately $9000 each year.

There are six regions within CSDA as shown on the map below:

The Helendale Community Services District is in the Southern Network of the CSDA, and it is time to vote for the 2027-2029 Term.

There is 1 Incumbent and 3 candidates running for Seat C. It is at the discretion of the Board to choose the best suited to represent the region.

Below is the list of candidates running;

Nikki Winslow, District Director, Altadena Library District (Incumbent)

Jason Dafforn, General Manager, Valley Sanitary District

John Horst, Director, Trabuco Canyon Water District

Melinda Sedmak, Trustee, Twentynine Palms Public Cemetery District

FISCAL IMPACT: None

REQUESTED ACTION: Select a candidate for CSDA Southern Network Seat C

ATTACHMENTS: All 4 Candidate statements

Letter of Support from Vice President Cardenas

2027-2029 CSDA Board Appointment – Seat C Southern Network

Candidate Statement – Nikki Winslow

I am honored to put myself forward as a candidate for the CSDA Board for the 2027-2029 term. Since my appointment to the seat in January 2026, I've familiarized myself further with CSDA Board operations and the incredible individuals who volunteer their time to advocate for the work that special districts accomplish. Being part of this team is inspiring, and I look forward to serving and representing my region on the Board for the 2027-2029 term. I believe deeply in the mission of special districts and the staff and leadership upholding this work. They provide libraries, parks, water, fire protection, vector control – and so many other vital services. Special districts are essential in strengthening California's communities, often serving as a critical connection and filling in gaps for services that would otherwise be unavailable. It is my goal to continue to advocate for policies that support sustainability, innovation, and equity for all districts across our state, and represent the interests of the Southern Seat C region on the Board.

For 6 years I have served as District Director of the Altadena Library District. In this role, I have been proud to guide our community through a period of both tremendous growth and significant challenges. Among my achievements, I successfully led the passage of a ballot measure that secured long-term, sustainable funding for our libraries, a feat accomplished in the first year of the 2020 pandemic. I oversaw the planning of our two major renovations and the reopening of our branch on the westside of Altadena in August 2025. In February of this year, our Main library closed and long-awaited renovation work will finally begin on this property. These projects ensure that our library spaces are welcoming, modern, and adaptable to community needs. And throughout 2025 I helped guide the District and our residents through the devastation of the Eaton Fire, leading recovery and rebuilding efforts while ensuring our library remained a place of connection and resilience during a time of crisis and uncertainty.

Prior to my work in Altadena, I served as Assistant Director of Glendale Library, Arts & Culture and, before that, spent nearly 15 years with the Las Vegas-Clark County Library District, where I gained deep experience in operations, branch management, and community partnership building. My educational background includes a Bachelor's in Political Science from UNLV, a Master's in Library and Information Science from the University of North Texas, and a Master's in Public Administration from Claremont Lincoln University. This academic foundation, paired with over two decades of professional leadership, has shaped my approach to governance—one grounded in strategic leadership, ethical decision-making, and a commitment to inclusive community engagement.

Throughout my career, I have worked with diverse populations and developed programming that directly meets the needs of my community. I have helped launch ESL and citizenship training programs for new Americans, championed the expansion of digital resources, and created equitable access to services for patrons of all ages and backgrounds. In Altadena, I have also been intentional about mentoring and empowering the next generation of library leaders. I am very passionate about professional development, and look forward to advocating for uplifting aspiring leaders in our special districts.

I want to continue to serve on the CSDA Board and spotlight how special districts meet challenges where larger government agencies sometimes cannot– with adaptability and innovation built-in to their structure. Advocating for these institutions is critical in meeting the needs of our California communities and solving problems that sometimes seem impossible. I believe my experiences navigating ballot measures, leading through emergencies, and building strong community partnerships add value to the Board's work. I especially believe my perspective as a library district leader—representing a sector that touches education, workforce development, equity, and civic engagement– is critical to the future of California's social infrastructure.

My involvement with CSDA is not just within my District or on the Board, but also as leadership in my local CSDA Chapter. I currently serve as Vice-Chair of the Special District Association of San Gabriel Valley Chapter Board, and was one of its founding members. In January 2024, I was invited to participate in a meeting to explore the formation of a new CSDA chapter in the San Gabriel Valley. At the group's follow-up meeting in May 2024, I volunteered to serve on the formation committee, which successfully launched the chapter in October 2024... I was honored to host one of our chapter meetings at the Altadena Main Library, featuring Supervisor Kathryn Barger as our invited speaker in September 2025. We recently hosted a chapter mixer to encourage our special district staff and elected officials to meet, network and learn about the vital work our districts provide to fulfill the diverse needs and priorities of residents across our region.

It would be a privilege to serve a full term alongside other committed leaders on the CSDA Board for the 2027-2029 term, advocating for the sustainability of our districts, supporting collaboration across sectors, and ensuring that all voices—large, small, urban, and rural—are represented in statewide conversations. I am ready to bring my passion, experience, and vision to this role, and I would be honored to earn your support.

Sincerely,

Nikki Winslow

District Director, Altadena Library District

Candidate Statement

My name is Jason Dafforn, and I am honored to be a candidate for the CSDA Board of Directors representing the Southern Network, including Los Angeles, Orange, San Diego, San Bernardino, Riverside, and Imperial counties.

I am a Licensed Civil Engineer with more than 30 years of experience in the water and wastewater industry, including 17 years as a utility manager for California local governments and more than 10 years serving special districts. I currently serve as General Manager of Valley Sanitary District in Indio, California.

Throughout my career, I have focused on strengthening essential public infrastructure, improving organizational performance, and leading teams to deliver practical, long-term solutions. I have a deep appreciation for the diversity of special districts and the critical services they provide, including water, wastewater, parks and recreation, fire protection, libraries, healthcare, and community services.

Additionally, I have actively represented special district interests through legislative advocacy, participating in multiple policy and legislative trips to Sacramento and Washington, D.C. over the past several years. These efforts have focused on engaging directly with state and federal policymakers to advance the needs and priorities of special districts across California.

I also serve on the Board of Directors of the Desert Recreation Foundation, a nonprofit organization supporting the Desert Recreation District, where we help expand access to quality recreational programs and facilities throughout the Coachella Valley. The Foundation was recently awarded the 2026 California Nonprofit of the Year for Senate District 18.

If elected, I will bring a strategic, pragmatic perspective to the CSDA Board of Directors and work collaboratively to ensure CSDA remains a strong, effective advocate and resource for its members. Together, we can continue to strengthen special districts and the communities they serve.

Thank you for your support.

Jason Dafforn, PE
General Manager, Valley Sanitary District

Candidate Statement – John Horst

My name is John Horst, and I'm running as a candidate for the California Special Districts Association in the Southern Network.

I am proud to stand as a candidate committed to strengthening the vital role special districts play in serving our communities. Special districts are the backbone of local government—providing essential services like water, fire protection, sanitation, and infrastructure that directly impact our daily lives. Across California, these districts are trusted, community-driven, and accountable to the people they serve.

As a current Director of the Trabuco Canyon Water District, I have focused on protecting taxpayer dollars, improving transparency, and ensuring reliable, high-quality water services. I serve on the Finance and Audit Committee, helping maintain fiscal discipline, and I chair the Outreach Committee to improve communication, so residents stay informed and engaged.

My background in business and operations shapes how I approach public service. I've built my career solving problems, improving efficiency, reducing costs, and strengthening organizations from within. I understand how to manage budgets, support teams, and make decisions that lead to long-term stability and success.

I'm not a career politician—I bring entrepreneurial experience, a strong work ethic, and a commitment to results. I ask tough questions, seek practical solutions, and stay focused on what matters most: serving our community responsibly.

I respectfully ask for your vote.

Candidate Statement for Melinda Sedmak

Special districts serve as the founda. on of local governance, providing essential services that directly impact the daily lives of the communities they serve. As a Trustee for the Twentynine Palms Public Cemetery District, I have developed a strong commitment to responsible governance, transparency, and the stewardship of public resources, particularly within a small, rural district that faces unique operational and financial challenges.

Cemetery districts represent a distinct and often underrepresented sector within special districts. These districts carry a profound public trust, preserving history, honoring families, and maintaining spaces of lasting community significance. At the same time, rural districts in the High Desert and Inland Empire regions frequently operate with limited resources and minimal representation at the statewide level. I am committed to ensuring that these voices are included in broader discussions affecting special districts across California.

My professional background as a managing paralegal in estate planning, trusts, and probate has provided me with a strong foundation in legal compliance, fiduciary responsibility, and long-term planning. Combined with my experience in civic leadership and election oversight, I bring a perspective grounded in accountability, structure, and public service.

I am actively engaged with CSDA resources and intend to attend the Special District Leadership Academy in San Diego in May 2026 to complete all four governance modules and work toward earning the Certificate in Special District Governance. I am prepared to commit the time and effort required to fulfill the responsibilities of serving on the CSDA Board of Directors, including participation in meetings, committees, and statewide initiatives.

I respectfully seek the opportunity to represent the Southern Network and to contribute a thoughtful, balanced perspective that supports all special districts, particularly those in rural and underserved regions.

July 13, 2026

Helendale Community Services District
Board of Directors
26540 Vista Road
Helendale, CA 92342

Dear President and Fellow Members of the Board:

I respectfully request that the Helendale Community Services District Board of Directors adopt a resolution supporting the reappointment of Nikki Winslow to the California Special Districts Association (CSDA) Board of Directors, representing Southern Network Seat C for the 2027–2029 term.

Over the past four years, as a CSDA member, I have had the privilege of witnessing Director Winslow's exceptional leadership, professionalism, and unwavering commitment to advancing the interests of California's special districts. Since her appointment to the CSDA Board of Directors, she has demonstrated a deep understanding of the challenges facing local agencies and has been a strong advocate for sound governance, fiscal stewardship, legislative engagement, and the continued professional development of district directors and staff throughout the state.

Director Winslow has built strong relationships with district officials, state legislators, and industry partners. Her continued service will provide stability and continuity as special districts navigate increasing regulatory requirements, infrastructure needs, workforce development, water reliability, and growing public expectations.

Director Winslow has also demonstrated the value of collaboration among special districts through CSDA. Following the devastating Altadena wildfires, she utilized CSDA's resources to assist the Altadena Library District in its recovery efforts and helped secure legislative advocacy to support the district's long-term resilience. Her actions exemplify the leadership and commitment needed to serve California's special districts effectively.

The Helendale Community Services District will benefit from having experienced and knowledgeable representation on the CSDA Board of Directors. Director Winslow has consistently supported initiatives that strengthen governance, expand educational opportunities for directors and staff, and advocate for policies that enable special districts to deliver reliable, efficient, and cost-effective public services.

For these reasons, I respectfully encourage the Board of Directors to adopt a resolution formally endorsing Nikki Winslow's reappointment to the California Special Districts Association Board of Directors, representing Southern Network Seat C, for the 2027–2029 term. I am confident her continued leadership will benefit not only the Helendale Community Services District, but special districts throughout Southern California.

Thank you for your consideration of this request and for your continued commitment to supporting effective leadership within California's special district community.

Respectfully submitted,

Director George Cardenas
Helendale Community Services District

Helendale Community Services District
26540 Vista Road, Suite C, Helendale, CA 92342

Date: July 16, 2026
TO: Board of Directors
FROM: Cheryl Vermette, General Manager – Administration / Recreation
SUBJECT: Agenda item #8
Discussion and Possible Action Regarding Lions Club Request to Use the Community Center for a Bingo Event

STAFF RECOMMENDATION

Provide direction to staff regarding the use of District facilities for the proposed Bingo event.

STAFF REPORT

The Lions Club has requested to use the Community Center for a large community bingo event anticipated to occur in October. A specific event date has not yet been finalized.
At the prior discussion, the Board considered the general request and provided direction for staff to gather additional information regarding the requirements associated with conducting bingo at the District's Community Center.

Staff has since confirmed that the Lions Club will be required to obtain the appropriate permit for conducting bingo at the CSD Community Center location. This permit will need to be secured and provided to the District before the District finalizes any use agreement for the event.

Additionally, if the Lions Club plans to serve alcohol during the event, the Lions Club will also be required to obtain and provide the appropriate Alcoholic Beverage Control permit. Proof of the required ABC permit must also be provided prior to finalization of the District's facility use agreement.

The District will not finalize the use agreement or allow the event to proceed until all required permits have been provided and reviewed by staff.

Prior to finalizing the use agreement, the Lions Club will be required to provide the following:

1. Proof of the required bingo permit for the CSD Community Center location;
2. Proof of an ABC permit, if alcohol will be served;

3. Proof of insurance listing the District as an additional insured, including the required additional insured endorsement
4. Completed Facility Use Agreement

FISCAL IMPACT

None

POSSIBLE BOARD ACTION

Option 1: Direct staff to continue working with the Lions Club on a facility use agreement for the proposed bingo event, conditioned upon the Lions Club obtaining and providing all required permits, including the bingo permit for the CSD Community Center location and an ABC permit if alcohol will be served.

Option 2: Provide alternative direction to staff.

Helendale Community Services District

26540 Vista Road, Suite C, Helendale, CA 92342

Date: July 16, 2026
TO: Board of Directors
FROM: Alex Aviles, General Manager Wastewater/Solid Waste
SUBJECT: Agenda item #9
Discussion Possible Action Regarding the Purchase of a Backhoe for the Wastewater Department

Staff Recommendation

Staff requests the Board of Directors Approve the purchase of a new 2026 John Deere 320P Backhoe from RDO Equipment

Staff Report

During the Budget process, staff presented the proposed CIP which includes both projects and equipment, to the Board for review. The purchase of a backhoe was included in the Wastewater CIP for this Fiscal Year.

While staff evaluated purchasing a used backhoe to reduce initial capital expenses, a few concerns arose with that option. Pre-owned equipment often comes from rental fleets where it often undergoes heavy, rigorous use. Furthermore, a lack of known maintenance history comes with the risk that the District may acquire a Backhoe that has not been maintained per the Operation and Maintenance Manuals.

Our current 2002 CAT backhoe was acquired from County during the formation of the District in 2007 and has served as an invaluable asset to our operation. While we have successfully managed routine maintenance issues externally over the years, the equipment has recently faced severe operational challenges with the hydraulic and exhaust systems. We sent the backhoe to Quinn Johnson for diagnostic and repair for the hydraulic system; however, they were unable to identify the root cause of the problem. The exhaust manifold also broke which redirected the exhaust heat and nearly caught the cab on fire.

The new backhoe will be Tier4 carb compliant which our current backhoe is out of compliance. Because of the estimated value of the purchase, it was noticed per the Board adopted Purchasing Policy in the Valleywide Newspapers. Source well was used by each of the bidding companies; we received three bids and have attached for review.

RDO EQUIPMENT CO.	(Extended 4-year Warranty included)	$176,828.53
QUINN CAT	(Extended 2-year Warranty included)	$177, 247.23
SONSRAY MACHINERY (CASE)	(Extended 5-year Warranty included)	$188,040.81

Fiscal Impact

$176,828.53 to be funded out of Wastewater Reserves

Possible Motion

Approve the purchase of a new 2026 JOHN DEERE 320P Backhoe from RDO EQUIPMENT for $176,828.53

Attachments

Quotes from RDO Equipment, QUINN CAT, and CASE

Retail Purchase Order

RDO Equipment Co.
20 Iowa Avenue
Riverside CA, 92507
Phone: (951) 778-3700 - Fax: (951) 778-3746

WARNING
Warning: Cancer and Reproductive Harm.
For more information go to: www.P65Warnings.ca.gov

Bill To:
HELENDALE COMMUNITY SERVICE DISTRICT
26540 VISTA ROAD
UNIT B PO BOX 359
HELENDALE, CA, 92342
(760) 951-0006

Ship To:
HELENDALE COMMUNITY SERVICE DISTRICT
26540 VISTA ROAD
UNIT B PO BOX 359
HELENDALE, CA, 92342
(760) 951-0006

Purchase Order Date:	7/8/2026
Purchase Order #:	2046724
Purchaser Account #:	0006036
Customer Purchaser Type:	Governmental - City/Town/Village
Customer Market Use:	Underground - Sewer/Water
Location of First Working Use:	HELENDALE, CA, 92342
Utility Sales Professional:	Cory Lopez
Phone:	1 (951) 213-2855
Fax:	
Email:	clopez@rdoequipment.com

Equipment Information

Quantity	Serial Number Stock Number	Hours (approx.)	Status / Year / Make / Model Additional Items	Cash Price
1	TBD TBD	0	New 2026 JOHN DEERE 320P	$246,404.76
			Freight in Factory Freight In To Riverside	$4,500.00
			Freight Out Delivery to Customer	$1,000.00
			Customer Discount Sourcewell Member Discount Account # 230802	($105,863.42)
			Install and Training PDI/Fuel/EIN	$3,500.00
			Warranty -John Deere Comprehensive-48 Months, 2000 Hours,Deductible: 0, Exp Date: 7/8/2030	$7,573.00
1	TBD TBD	0	New 2026 JOHN DEERE 60" Forks	$6,989.17

Equipment Subtotal: $164,103.51

Purchase Order Totals

Balance:	$164,103.51
CA STATE TAX:	$9,846.21
CA COUNTY TAX:	$410.26
CA SPECIAL TAX:	$2,461.55
Sales Tax Total:	$12,718.02
CA Tire Fee:	$7.00
Sub Total:	$176,828.53
Cash with Order:	$0.00
Balance Due:	**$176,828.53**

Legal Information

For the Construction Product(s)

ACKNOWLEDGMENTS - Purchaser offers to sell, transfer, and convey the item(s) listed as “Trade In” to the Dealer at or prior to the time of delivery of the above Product(s), as a “trade-in” to be applied against the cash price. Purchaser represents that each “trade-in” item shall be free and clear of all security interests, liens, and encumbrances at the time of transfer to the Dealer except to the extent shown below. The price to be allowed for each “trade-in” item is listed on this document. The Purchaser promises to pay the balance due shown hereon in cash, or to execute a Time Sale Agreement (Retail Installment Contract), or a Loan Agreement for the purchase price of the Product(s), plus additional charges shown thereon, or to execute a Lease Agreement, on or before delivery of the Product(s) ordered herein. Despite delivery of the Product(s) to the Purchaser, title shall remain with the Seller until one of the foregoing is accomplished. Except as provided herein and as necessary to protect RDO Equipment from the claims or a bankruptcy trustee or a buyer in the ordinary course or business, the Purchaser and the Dealer agree that this Purchase Order is not a security agreement and that delivery of the Product(s) to the Purchaser pursuant to this Purchase Order will not constitute possession of the Product(s) by the Purchaser, as a debtor, for the purposes of the purchase money security provisions in any statutes relating to personal property security or its equivalent. Purchaser understands that its rights in connection with this purchase are limited as set forth in this Purchase Order. I (we) hereby grant a security interest to RDO Equipment in the Product.

DISCLOSURE OF REGULATION APPLICABILITY - When operated in California, any off-road diesel vehicle may be subject to the California Air Resources Board In-Use Off-Road Diesel Vehicle Regulation. It therefore could be subject to retrofit or accelerated turnover requirements to reduce emissions of air pollutants. More information is available on the California Air Resources Board website at http://www.arb.ca.gov/msprog/ordiesel/ordiesel.htm.

IMPORTANT WARRANTY NOTICE - The Standard Warranty for new John Deere construction and forestry products is set forth in a separate document provided by the dealer.Please read the Standard Warranty carefully before signing. No express warranty is made unless specified in the Warranty Statement. PURCHASER'S RIGHTS AND REMEDIES PERTAINING TO THIS PURCHASE ARE LIMITED AS INDICATED IN THE STANDARD WARRANTY AND PURCHASE ORDER. WHERE PERMITTED BY LAW, NO IMPLIED WARRANTY OF MERCHANTABILITY OR FITNESS IS MADE.

Telematics: Orders of telematic devices include only the hardware. Where available, telematics software, including JDLink™ connectivity service, may be enabled from your local John Deere Operations Center or JDLink website. Please see your authorized John Deere dealer for assistance.

The undersigned purchaser(s) (the “Purchaser”) hereby orders the product (the “Product”) described above from the Dealer. The Dealer shall not be liable for failure to provide the Product or for any delay in delivery if such failure or delay is due to the Dealer's inability to obtain such Product from the manufacturer or supplier or other cause beyond the Dealer's control. The cash price shown above is subject to the Dealer receiving the Product from the manufacturer or supplier prior to any change in price by the manufacturer or supplier and is also subject to any new or increased taxes being imposed upon the sale of the Product after the date of this Purchase Order.

Upon signature of delivery acknowledgment, customer is accepting the equipment, including attachments, in “AS IS” condition, agreeing to notify RDO Equipment Co. within 24 hours of any damages or discrepancies found upon receipt of equipment.

Signature Area

Purchase Order Accepted By:

(Customer's Signature) (Date Accepted)

(Authorized Signature of Dealer) (Date Accepted)

Equipment Options

Qty	Serial Number	Year / Make / Model	Description
1	TBD	2026 JOHN DEERE 320P	None
1	TBD	2026 JOHN DEERE 60" Forks	AT308139 FORKS, PALLET (2) 60 IN.(1.52M) WITH 60 IN. (1.52

STANDARD WARRANTY FOR NEW JOHN DEERE CONSTRUCTION, COMPACT CONSTRUCTION (CCE) FORESTRY, AND UTILITY PRODUCTS – US & Canada

- **Construction & Forestry Products:** 12 months/unlimited hours (whichever occurs first) Full Machine Standard Warranty
- **Compact Construction Equipment (CCE) Products:** 24 months or 2000 hours (whichever occurs first) Full Machine Standard Warranty
- **C&E Series Pull-Type Scrapers:** 6 months Full Machine Standard Warranty
- **DC & DE Pull-Type Scrapers**: 12 months Full Machine Standard Warranty
- **Scraper Tractors:** 24 Months or 2000 Hours (whichever occurs first) Full Machine Standard Warranty
- **Forestry Attachments:** 12 Months or 2000 Hours (whichever occurs first) Full Machine Standard Warranty

The "Standard Warranty" is part of the warranty protection package available from John Deere Construction & Forestry Company (John Deere Limited in Canada) ("John Deere") to purchasers of new John Deere products ("product"):

STANDARD Warranty is John Deere's standard new product warranty, described in this document, provided at no additional charge to the purchaser.

EXTENDED Warranty is a separate repair contract made available by John Deere for purchasers who wish to complement their Standard Warranty coverage. Complete Extended Warranty details, including coverage options and limitations, are set forth in the Application for Extended Warranty, which is available from authorized John Deere dealers.

STRUCTURALL Warranty applies to certain structural components as listed below and as described in this document.

FACTORY-INSTALLED UNDERCARRIAGE Warranty applies to certain undercarriage components as listed below and as described in this document.

A. STANDARD WARRANTY - GENERAL PROVISIONS

John Deere will repair or replace, at its option, any parts (except those specified below) of a new John Deere product that, as delivered to the original retail purchaser(s), are defective in material or workmanship. Performance of this warranty will be free of charge for parts and labor, except as otherwise stated below. Standard Warranty applies only to purchases from John Deere and authorized John Deere dealers and, except as otherwise provided in the next sentence and section L below, is extended only to the original retail purchaser of the product. Remaining Standard Warranty applicable to a used John Deere product is transferred to a subsequent purchaser of the product only if the subsequent purchaser requests a transfer from an authorized John Deere dealer before the product's Standard Warranty expires. Coverage begins on the date of delivery of the product to the original retail purchaser. For purposes of this warranty, a product that has been rented, used for demonstration purposes for 150 or more hours, or otherwise used prior to its original retail purchase has been "used" for the total duration of such use. Warranty statements required by law covering engine emissions-related parts and components are found on a separate written warranty certificate provided to the purchaser at the time of the original retail purchase.

B. WHAT IS COVERED BY STANDARD WARRANTY -

All parts of a new John Deere product (except those noted in Sections D and E below) are covered during the Standard Warranty period set out above.

C. EXCLUSIVE REMEDY -

The repair or replacement of covered parts or components that are defective, as provided in Sections A, B, D.2 and D.3 herein, shall be the purchaser's exclusive remedy for any defect in the product. However, if after repeated attempts such repair or replacement fails to correct the performance problem caused by the defect, the purchaser's sole remedy shall be a refund of the amount paid for the product (in exchange for a return of the product), excluding any transportation charges, license fees, taxes and insurance premiums, and less a reasonable allowance for use of the product prior to its return. In no event will the dealer, John Deere or any company affiliated with John Deere be liable for any incidental or consequential damages, including but not limited to loss of profits, rental of substitute equipment or other commercial loss. Correction of defects in the manner provided above shall constitute fulfillment of all liabilities of the Dealer, John Deere, or any company affiliated with John Deere to the purchaser or any other person, whether based upon contract, tort, strict liability, or otherwise. This limitation does not apply to claims for personal injury.

D. ITEMS COVERED SEPARATELY -

1. Standard Warranty does not apply to batteries, radios, tires, cameras, or to Cummins, MTU or Detroit Diesel Engines installed in John Deere products, which are covered by separate written warranties.
2. Factory-Installed Undercarriage Warranty covers all non-rubberized factory-installed undercarriage wear components for 3 years or 4,000 hours from the date of delivery to the original retail purchaser, whichever occurs first (unless terminated earlier under Section F, below). For purposes of this warranty, a product that has been rented, used for demonstration purposes for 150 or more hours, or otherwise used prior to its original retail purchase has been "used" for the total duration of such use. In addition to the items listed in section E below, Factory-Installed Undercarriage Warranty does not cover: failures due to wear, machine application, maintenance practices, or improper machine configuration; removal and installation labor; transportation or hauling costs; unapproved parts; non-wear items; and rubberized undercarriage components such as rubber tracks. Warranty claims will be pro-rated based upon wear of the failed component and whether track shoe width is approved by John Deere. Factory-Installed Undercarriage Warranty does not apply to Scraper Tractors.
3. StructurALL Warranty for new John Deere Products (except Compact Excavators & Loaders, Skid-Steer Loaders, Compact Track Loaders, Scraper Tractors, Pull-Type Scrapers, and Forestry Attachments, which are not eligible for StructurALL Warranty) begins at the date of delivery to the original retail purchaser and ends (unless terminated earlier under Section F, below) after three (3) years, or 10,000 hours (whichever occurs first). For purposes of this warranty, a product that has been rented, used for demonstration purposes for 150 or more hours, or otherwise used prior to its original retail purchase has been "used" for the total duration of such use. **StructurALL Warranty applies only to the following structural components listed below as installed on the product at the time of original manufacture.** If a particular component is not listed below it is not covered by StructurALL Warranty.

   Arm; Articulation Joint (incl. pins & bushings); Bin Frame; Boom; Carbody; C-Frame*; Circle Frame; Coupler (John Deere built ONLY); Dipperstick; Draft Frame; Engine Frame; Equipment Frame; Grapple Arch and Grapple Boom; Loader Arm; Loader Frame; Mainframe; Moldboard Lift Arm; NeverGrease™ Pin Joints [Includes steering pin and bushing joints (standard equipment), roller elements (roller bearings) in bucket to boom joints and sliding elements (bushing) for boom and linkage joints (optional equipment)]; Rollover Protection Structure (ROPS); Side Frame; Swing Frame; Track Frame; Undercarriage Frame; X-Frame; Z-bar loader linkage (including bell crank and bucket driver link); Specialty booms and arms marketed as "heavy duty" by John Deere.

   Items Covered by StructurALL for Cut-to-Length Forestry Machines: Front frame (welded assembly); Rear frame (welded assembly); Crane king post with basement; Middle joint frame; Cabin swing frame; Main Boom

   StructurALL Warranty does not apply to:

   1. Any product used primarily in extreme duty or severe duty applications such as but not limited to: demolition and wrecking, chemical plant (including fertilizer plants), salt mines, steel mill, land fill and transfer stations, scrap handling, scarifying and other applications that are similarly destructive or similarly heavy duty except specialty booms and arms as stated in Section D.3 above.
   2. C-Frames on Crawlers equipped with root rakes or used in forestry applications unless equipped with an "extreme duty" reinforcement package.
   3. Cut-to-Length Forestry Heads and Slash Bundler Units.
   4. Crawlers equipped with optional side booms.
   5. Cut-to-Length Forestry, Excavator, and Log Loader swing bearings.
   6. Motor Graders equipped with front- or rear-mounted snow wings.

E. ITEMS NOT COVERED -

John Deere is NOT responsible for the following:

1. Freight
2. Adjustments to compensate for wear, for periodic maintenance or adjustments that result from normal wear and tear.
3. Damage caused by unapproved adjustments (electronic or mechanical) to machine or machine components outside of published specifications including but not limited to engine, hydraulic components and relief valves.
4. Program updates, calibrations, and pressure adjustments.
5. Additional Labor Time - Above Dealer Labor Rate
6. Additional Cleaning - Above Dealer Labor Rate
7. Rental Fees
8. Depreciation or damage caused by normal wear or application, lack of reasonable and proper maintenance, failure to follow operating instructions, misuse, lack of proper protection during storage, vandalism, negligence, collision, or other accidents.
9. Premiums charged for Overtime Labor
10. Transportation to and from the dealership.
11. Travel time, mileage, or service calls by the dealer.
12. Non-John Deere components or modifications, Rotobec grapples, and attachments installed aftermarket.
13. Shop supplies and maintenance items such as, but not limited to: filters, fuels, oil, hydraulic fluid, lubricants, coolants, conditioners, shop towels, cleaners and degreasers.
14. Torn, cut, or worn hoses.
15. Wear items, such as, but not limited to: body liner, belts, blades, bulbs, lubricated joints (including pins and bushings), dry brakes, brake linings, dry clutch linings, saw blades, chains, skidder grapple shocks, color marking nozzles, and articulation bumpers.
16. Items such as cutting-edge parts, delimbing knives, bucket teeth and rubber track are not warranted for depreciation or damage caused by normal wear, lack of proper maintenance, misuse, failure to follow operating instructions, the elements or accident.
17. Any defect in a non-covered component, or damage to or failure of a covered component caused by a defect in a non-covered component.
18. Secondary damage which occurs from continued operation of a product after recognition of the occurrence of a failure.
19. Parts supplied by or repairs, maintenance or modifications performed by someone other than an authorized John Deere dealer, including any damage caused by such use of parts, repairs, maintenance, or modifications not performed by an authorized John Deere dealer.
20. Topping off fluids when fluid levels fall in the range between low and full
21. Parts/Kits not ordered on machine and installed aftermarket. These parts will be covered by any applicable parts warranty.
22. Attachments installed aftermarket – i.e., Winch not installed at factory.
23. Custom options installed outside the factory – i.e., G.R. Manufacturing option packages.
24. Used Products (except as otherwise provided in section L below).

F. TERMINATION OF WARRANTY-

John Deere is relieved of its obligations under Standard Warranty, StructurALL Warranty, Factory-Installed Undercarriage Warranty and/or Extended Warranty if:

1. The product is modified or altered in ways not approved by John Deere; or
2. Any unapproved or improperly sized attachment is installed on the product. Approval and attachment size shall be at John Deere's sole discretion. (Consult dealer prior to installing attachments or product modification).
3. The product is moved outside the US and/or Canada.

G. PARTS REPLACED UNDER WARRANTY -

Only new or remanufactured parts or components furnished or approved by John Deere, will be used if John Deere elects to repair the product. If any such part or component is defective in material or workmanship when installed in the product, John Deere will repair or replace, as it elects, such defective part or component, provided the defect is reported to an authorized John Deere dealer within 90 days of installation or before expiration of the applicable Standard Warranty, Factory-Installed Undercarriage Warranty and/or StructurALL Warranty whichever is later.

H. TELEMATICS

NOTICE: Products may be equipped with telematics hardware and software ("Telematics") that transmit data to John Deere/ Dealer. Purchaser may deactivate Telematics at www.jdlink.com.

Notwithstanding Purchaser's right, title or interest in the Products, Purchaser agrees that John Deere and Dealer (their affiliates, successors and assigns), without further notice to Purchaser have the right to:

1. Access, use, collect and disclose any data generated by, collected by, or stored in, Products or any hardware or devices interfacing with Products ("Machine Data");
2. Access Machine Data directly through data reporting devices integrated within, or attached to, Products, including Telematics ("Data Reporting Systems"); and
3. Update the Data Reporting Systems software from time to time. Machine Data will only be used in accordance with John Deere's Machine Data Policy, located at www.JohnDeere.com/MachineDataPolicy.

I. OBTAINING WARRANTY SERVICE -

To obtain warranty service, the purchaser must request warranty service from a John Deere dealer authorized to sell the product to be serviced. When making such a request, the purchaser must present evidence of the product's delivery date, make the product available at the dealer's place of business, and inform the dealer in what way the purchaser believes the product to be defective. Standard Warranty, Factory-Installed Undercarriage Warranty and/or StructurALL Warranty repairs may be made in the field if the purchaser and servicing dealer so desire. However, John Deere will not be responsible for any charges (such as dealer travel time, mileage or extra labor) that would not have been incurred had the product been repaired at the dealer's place of business.

J. NO IMPLIED WARRANTY, CONDITIONS OR OTHER REPRESENTATION -

Where permitted by law, neither John Deere nor any company affiliated with it makes any warranties, representations, conditions or promises, express or implied, as to the quality, performance, or freedom from defect of its products, other than those set forth in this document and **NO IMPLIED WARRANTY OF MERCHANTABILITY, CONDITIONS OR FITNESS IS MADE.**

K. NO DEALER WARRANTY -

The selling dealer makes no warranty of its own on any item covered by this warranty and makes no warranty on other items unless the dealer delivers to the purchaser a separate written warranty certificate specifically warranting the item. **The dealer has no authority to make any representation or promise on behalf of John Deere, or to modify the terms or limitations of this warranty in any way.**

L. USED JOHN DEERE PRODUCTS ONLY -

John Deere will transfer remaining Standard Warranty, Factory-Installed Undercarriage Warranty and/or StructurALL Warranty to the purchaser of a used John Deere construction and/or forestry product that has been used for less than the full warranty period provided at the product's original retail purchase. This transfer is not effective until change of ownership is registered by a John Deere dealer. **ALL THE TERMS, INLCUDING LIMITATIONS AND EXCLUSIONS, OF THE JOHN DEERE STANDARD WARRANTY, FACTORY-INSTALLED UNDERCARRIAGE WARRANTY, AND/OR STRUCTURALL WARRANTY ORIGINALLY PROVIDED FOR THE PRODUCT REMAIN IN EFFECT AND APPLICABLE.**

195579-01

Jul 08, 2026

HELENDALE CSD
PO BOX 359
HELENDALE, California 92342-0359

Attention: Alex Aviles

Dear Sir,

We would like to thank you for your interest in our company and our products, and are pleased to quote the following for your consideration.

One (1) New Caterpillar Inc. Model: 430 Backhoe Loader including standard and optional equipment as listed below.

STOCK NUMBER: NS0024186 **SERIAL NUMBER:** 0H8W01625 **YEAR:** 2025 **SMU:** 1

We wish to thank you for the opportunity of quoting on your equipment needs. This quotation is valid for 30 days, after which time we reserve the right to re-quote. If there are any questions, please do not hesitate to contact me.

Sincerely,

Rich Kinney
Machine Sales Representative

One (1) New Caterpillar Inc. Model: 430 Backhoe Loader including standard and optional equipment as listed below.

STANDARD EQUIPMENT

BOOMS, STICKS, AND LINKAGES -BACKHOE -- 15' Center pivot backhoe -4.5 Meters -- Boom and swing transport locks -- Pilot operated backhoe and -electro hydraulic stabilizer controls -- Street type stabilizer shoes -- Anti-drift hydraulics (boom, stick, -and E-stick) -- Cat Cushion Swing(tm) system -LOADER -- Single Tilt Loader -- Lift cylinder brace -- Self-leveling loader with single -lever control -- Return-to-dig -(automatic bucket positioner) -- Transmission neutralizer switch -- Bucket level indicator -

POWERTRAIN -- Water separator -- Thermal starting aid system -- Dry type axial seal air cleaner with -integral precleaner -- Automatic dust ejection system -- Filter condition indicator -- Hydraulically boosted multi-plate -wet disk brake with dual pedals & -interlock -- Differential lock -- Drive-line parking brake -- Torque converter -- Neutral safety switch -- Spin-on filters for -Fuel -Engine oil -Transmission oil -- Outboard Planetary Rear Axles -- Diesel particulate filter -- Hydrostatic power steering

HYDRAULICS -- Pilot hoe and mechanical loader -controls -- Load sensing, variable flow system -with 43 gpm (162 L/min) axial piston -pump -- 6 micron hydraulic filter -- Caterpillar XT-3 hose -- Hydraulic oil cooler -- Pilot control shutoff switch -- Flow-sharing hydraulic valves -- Hydraulic suction strainer -

ELECTRICAL -- 12 volt electrical start -- Horn, front and rear -- Backup alarm -- Hazard flashers/turn signals -- Halogen head lights (2) -- Halogen rear flood lights (2) -- Stop and tail lights -- Audible system fault alarm -- Key start/stop system -- 850 CCA maintenance free battery -- Battery disconnect switch -- External Power Receptacle (12v) -- Diagnostic ports for engine and -machine Electronic Control Modules

OPERATOR ENVIRONMENT -- Interior rearview mirror -- ROPS canopy, Rear Fenders -- 2-inch (50mm) retractable seat belt -- Tilt steering column -- Steering knob -- Hand and foot throttle -- Automatic Engine Speed Control -- One Touch Low Idle -- Floor mat and Coat Strap -- Lockable storage area -- Air suspension seat -

FLUIDS -- Antifreeze - Extended Life Coolant --20F (-30C)

OTHER STANDARD EQUIPMENT -- Standard Storage Box -- Transport tie-down points -- Ground line fill fuel tank with -42.3 gal (160L) capacity & 5 gal (19L) -diesel exhaust fluid -- Rubber impact strips on radiator -guard -- CD-ROM Parts Manual -- Safety Manual -- Operations and Maintenance Manual -- Lockable hood -- Tire Valve Stem Protection

MACHINE SPECIFICATIONS

430 07A BHL CFG2	543-3343	$131,470.00
LANE 2 ORDER	0P-9002	$0.00
BELT, SEAT, 3" SUSPENSION	206-1748	$187.00
TIRES, 340 80-18/500 70-24, MX	533-0488	$4,290.00
STABILIZER PADS, FLIP-OVER	9R-6007	$435.00
BUCKET-MP, 1.4 YD3, PO	337-7442	$7,931.00
LOADER BUCKET PINS	545-8548	$0.00
CUTTING EDGE, TWO PIECE,WIDE	9R-5320	$329.00
BUCKET, HOE, (NONE)	175-7877	$0.00
INSTRUCTIONS, ANSI	559-0872	$0.00
SERIALIZED TECHNICAL MEDIA KIT	421-8926	$0.00
LINES, CPLR, 15' EXT PILOT	555-2397	$3,014.00
COUPLER NONE	487-6058	$0.00
PACK, DOMESTIC TRUCK	0P-0210	$0.00
SHIPPING/STORAGE PROTECTION	461-6839	$0.00
RUST PREVENTATIVE APPLICATOR	462-1033	$0.00
TRIM PACKAGE 2	642-9585	$62,790.00
PRODUCT LINK, CELLULAR, PLE643	639-4880	$0.00
430 LANE 2 ZCON	628-8814	$0.00
BHL FORKS - NA6268	BHL FORKS	$2,057.81
COUPLER, PG, HYDR.D.LOCK, BHL	485-5303	
PINS, BUCKET, BHL-F, 45MM-50MM	178-3593	
THUMB, HYD, NO TINE	282-5409	
THUMB, TINE, A 3	221-4283	
BUCKET-HD, 24", 6.2 FT3	219-3387	

WARRANTY & COVERAGE

Standard Warranty:	12 MONTHS FULL MACHINE
Extended Coverage:	430-24 MO/3000 HR POWERTRAIN + HYDRAULICS + TECH
CSA	24 Months / 1,000 Hours Parts Only + VisonLink Connect

SELL PRICE	$163,569.22
EXT WARRANTY	Included
CSA	Included
NET BALANCE DUE	**$163,569.22**
SALES TAX (7.75%)	$12,676.61
AFTER TAX BALANCE	**$176,245.83**

PAYMENT TERMS

Cash Invoice Terms

CASH WITH ORDER
$177,247.23

F.O.B/TERMS:
Hesperia Machine

ADDITIONAL CONSIDERATIONS

- In Stock

Accepted by____________________________________ **on** _____________________

____
Signature

SONSRAY MACHINERY

Together WE MOVE MOUNTAINS
ARIZONA CALIFORNIA NEVEDA NEW MEXICO OREGON TEXAS WASHINGTON

CASE CONSTRUCTION

10062 Live Oak Ave. · Fontana · CA · 92335 TEL: (909) 355-1075
www.SonsrayMachinery.com

Ship To: HELENDALE COMMUNITY SERV DIST	Fontana	
26719 VISTA RD	July 1, 2026	jserpa-1232
HELENDALE CA 92342	HELEN005	7609510006
Invoice To: HELENDALE COMMUNITY SERV DIST		Purchase Order:
26719 VISTA RD		
HELENDALE CA 92342		Sales Person: Jose Serpa

Attention: ALEX AVILES

EQUIPMENT QUOTE/SALES ORDER

2026 CASE 580SN	Serial #: Factory Order / Q# 702185511 Stock #: Factory Order / Q# 702185511	$167,275.00

NEW 2026 CASE BACKHOE - 580SN 4x4 CAB EX-HOE / 97 HP-GROSS - TIER 4-FINAL / 4WD W/DRIVE SHAFT GUARD
AUTO-RIDE CONTROL / POWER SHIFT TRANSMISSION "H" TYPE / EXTENDAHOE W/GRIPPER TEETH EXTENSION-HD FRONT CWT
PILOT CONTROLS / JOYSTICK CONTROLS / FLIP-OVER STABILIZER PADS COMBO / AUTO-UP OPTION / HYD-COUPLER-BACKHOE
24" - BACKHOE BUCKET INCLUDED / 82" FRONT LOADER BUCKET - 4x1 STYLE W/EDGES / SWING-OVER FORKS INCLUDED
CASE HYDRAULIC THUMB ATTACHMENT INCLUDED / TWO DOOR ENCLOSED CAB - HEAT & AIR / PREMIUM AIR SUSPENSION SEAT
3" RETRACTABLE SEAT BELT / RADIO WITH AM-FM-MP3 / BLUETOOTH / COMFORT STEER / LED LIGHTING PACKAGE INCLUDED
AMBER STROBE LIGHTS INCLUDED / SLOW VEHICLE EMBLEM INCLUDED / DEF-FUEL COVERS-ANTIVANDAL COVER
1 YR-UNLIMITED HOURS - STANDARD CASE WARRANTY / TELEMATIC-SITEWATCH FIVE YRS ADVANCED PACKAGE
SONSRAY SIGNATURE SERVICE INCLUDED (SEE FLYER ATTACHED).

SEIS / PPP - 5 YRS-5000 HRS - NO TTM - PREMIER PKG	$7,300.00
Quoted Price	$174,575.00
Sales Tax 7.75%	$12,963.81
Processing Fee	$ 495.00
CA Tire Tax	$ 7.00
Cash Due or Finance Amount	$188,040.81

NOTICE TO PURCHASER

Caution. Do not sign this contract before you thoroughly read both pages 1 and 2 of it or if it contains blank spaces, even if otherwise advised.
You are entitled to an exact and completely filled in copy of this Sales Order when you sign it. Keep it to protect your legal rights.
Store Manager signature required for final acceptance of Sales Order.

THIS AGREEMENT IS SUBJECT TO THE ADDITIONAL TERMS AND CONDITIONS ON THE REVERSE SIDE. CUSTOMER HAS HAD THE OPPORTUNITY TO READ THE TERMS OF THIS AGREEMENT PRIOR TO SIGNING.

Purchaser's Signature ______________________ Sales Consultant ______________________ Date __________

Print Name ______________________ Date __________ Accepted By ______________ Date __________

1. This is a cash transaction. If the Purchaser so requests prior to acceptance, the Cash Due on Delivery may be financed as a time sale transaction, subject to credit approval. If this transaction becomes a time sale, Purchaser agrees (1) to make payments pursuant to the Sonsray Machinery Accounts Receivable System Agreement, which is incorporated into this Purchase Order by reference, and (2) that Seller retains a security interest in the goods described herein until all obligations of Purchaser are paid in full and discharged.

2. When trade-in equipment is not to be delivered to the Seller until delivery of the equipment purchased by this order, the trade-in equipment may be reappraised at that time and such reappraisal value shall determine the allowance made for such trade-in equipment. When the reappraised value is less than the original trade-in allowance shown on this form, the purchaser may terminate this order; however, this right of termination must be exercised prior to delivery of the equipment by Seller and surrender of the trade-in equipment to Seller.

3. The prices which Purchaser will pay for the new equipment set forth on the reverse side hereof shall be based upon the Case dealer price in effect on date of delivery of the new equipment. In the event Case dealer's price is changed prior to delivery, the purchase price shall be adjusted accordingly. If such price change results in an increase, purchaser has the option of canceling the order in writing immediately on being notified thereof.

4. The Seller shall be excused if delivery is delayed or rendered impossible by differences with workmen, strikes, work stoppages, car shortages, delays in transportation, inability to obtain labor or materials and also by any cause beyond the reasonable control of Seller, including but not restricted to acts of God, floods, fire, storms, acts of civil and military authorities, war and insurrections.

5. Purchaser shall keep the property free of all liens, taxes, encumbrances and seizure or levy, shall not use same illegally, shall not damage, abuse, misuse, abandon or lose said property, shall not part with possession thereof, whether voluntarily or involuntarily or transfer any interest therein or remove same out of the county or filing district in which Purchaser resides as indicated herein without the prior written consent of Seller, shall keep said property insured in such amounts and with such insurer as may be acceptable to Seller with any loss payable to Seller as his interest in the property may appear.

6. Time is of the essence of this contract and if purchaser fails to comply with any of the terms and conditions hereof or defaults in the payment of any installment hereunder or under any renewal or renewals hereof, or in the payment of interest or defaults in the payment of any installment due under any other indebtedness of contract held by the Seller or Assignee, or if proceedings are instituted against Purchaser under any bankruptcy or insolvency law or Purchaser makes an assignment for the benefit of creditors or if for any reason the Seller deems himself insecure and so declares all payments heretofore made by Purchaser shall be retained by the seller and all indebtedness hereunder shall become immediately due and payable, with or without notice, together with all expenses of collection by suit or otherwise, including reasonable attorney fees and Seller may, without notice or demand, take possession of the equipment set forth on the reverse hereof, or any additions to, replacements of, or any proceeds from said equipment or may render the property unusable or Seller may require Purchaser to assemble the property and make it available at a place designated by Seller. Seller may resell the retaken property at public or private Sale in accordance with the Uniform Commercial Code or applicable state or provincial law. After deducting reasonable expenses for retaking, repairing, holding, preparing for sale, other selling expenses including attorney fees and legal expenses, the remaining proceeds of Sale shall be credited upon the amount of indebtedness remaining unpaid hereunder, and Purchaser agrees to pay any deficiency upon demand by Seller, any surplus, however, shall be paid to Purchaser. Said retaking or repossession shall not be deemed rescission of the contract. Seller may exercise any other rights and remedies provided by applicable law.

7. No waivers or modifications hereof shall be valid unless written upon or attached to this contract. Waiver or conditions of any breach or default hereunder shall not constitute a waiver of any other or subsequent breach or default. Payments received by Seller are to be applied first to delinquent interest and then to principal.

8. The remedies provided for herein are not exclusive and any action to enforce payment shall not waive or affect any of the holder's rights to have recourse to the property. The transfer of this contract shall operate to pass a security interest in the property as security for the payment hereof.

9. Any provision of this contract prohibited by the laws of any state, the United States, any province of Canada, shall be ineffective to the extent of such prohibition without invalidating the remaining portions of the contract.

10. Each maker, endorser, guarantor and surety hereon severally waives presentment, demand protest, and notice of non-payment and all defenses of want of diligence in collection and bringing suit. This contract shall be binding upon and shall insure to the benefit of the parties hereto and their respective heirs, personal representative, successors, and signs.

11. Buyer authorizes Seller to insert the Serial and/or model numbers of the goods set forth on the reverse side hereof for the purposes of identifying said goods. The seller may correct patent errors herein.

Helendale Community Services District
26540 Vista Road, Suite C, Helendale, CA 92342

Date: July 16, 2026
TO: Board of Directors
FROM: Cheryl Vermette, General Manager – Administration / Recreation
SUBJECT: Agenda item #10
Discussion and Possible Action Regarding Consideration of a Six-Month Pilot Alternative Work Schedule and Modification of Public Office Hours

Recommendation

Consider approving a six-month District-wide pilot alternative work schedule consisting of four 10-hour workdays, also known as a 4/10 schedule, for eligible employees, as staffing and operational needs allow effective July 27, 2026, and modifying public office hours from 8:00 a.m. – 5:30 p.m. to 8:00 a.m. – 5:00 p.m., effective September 1, 2026.

Background

The District is currently open to the public from 8:00 a.m. to 5:30 p.m., Monday through Friday. Administrative staff work the same hours and do not have dedicated preparation time prior to the office opening to the public. As a result, staff must balance public-facing responsibilities with daily administrative and operational duties throughout the workday. As customer service options have expanded, many routine transactions can now be completed electronically, including online payments, new owner and tenant applications, email communication, and voicemail.

To evaluate the potential impact of modifying public office hours, staff tracked customer activity between 5:00 p.m. and 5:30 p.m. from April 27, 2026 through June 30, 2026. During that period, 25 customers were assisted in the office and 12 customers were assisted by phone during the final thirty minutes of the business day. Based on this data, customer activity during this time period is minimal.

Staff is requesting approval of a six-month pilot program to evaluate whether a modified work schedule can improve operational efficiency, enhance employee satisfaction, and support long-term workforce sustainability while maintaining effective customer service levels. Providing employees with greater flexibility and improved work-life balance may contribute to higher job satisfaction, reduced burnout, improved performance, and increased employee engagement. In turn, these factors can strengthen employee retention by helping the District attract and retain qualified staff, reducing turnover and preserving institutional knowledge and operational continuity. The pilot program will also assess whether increased opportunities for focused, uninterrupted work improve productivity, responsiveness, and the overall quality of service provided to the public.

The pilot would apply to Administration, Water, and Wastewater as staffing and service requirements permit. Field operations would continue to maintain service levels and emergency response capabilities. The General Managers would retain discretion to modify schedules as needed to address coverage, emergencies, training, staffing shortages, and operational needs.

Strategic Plan Alignment

The proposed pilot supports the District's Strategic Plan by advancing workforce resilience, operational efficiency, and technology modernization. The pilot directly supports Workforce Resilience by evaluating whether an alternative work schedule can improve employee retention, morale, productivity, and work-life balance while maintaining service levels.

Pilot Program Evaluation

During the six-month pilot period, staff will monitor:

- Customer service levels and customer feedback
- Operational impacts;
- Employee productivity;
- Employee feedback; and
- Any unforeseen challenges or benefits.

At the conclusion of the pilot program, staff will return to the Board with an evaluation and recommendation regarding continuation, modification, or discontinuation of the program.

Fiscal Impact

There is no anticipated direct fiscal impact associated with implementation of the pilot program.

Possible Motion

Approve a six-month District-wide pilot alternative work schedule consisting of four 10-hour workdays, also known as a 4/10 schedule, for eligible employees, as staffing and operational needs allow effective July 27. 2026; and modify public office hours from 8:00 a.m. – 5:30 p.m. to 8:00 a.m. – 5:00 p.m., effective September 1, 2026, with staff to return to the Board upon completion of the pilot period with an evaluation and recommendation regarding future implementation.

Helendale Community Services District

26540 Vista Road, Suite C, Helendale, CA 92342

Date: July 16, 2026
TO: Board of Directors
FROM: Cheryl Vermette, General Manager – Administration / Recreation
SUBJECT: Agenda item #11
Discussion and Possible Action Regarding Community Resilience Centers Program Round 2- Authorization to Begin Project Planning and Form Board Ad Hoc Committee

BACKGROUND

The California Strategic Growth Council has released the Community Resilience Centers Program Round 2 Final Program Guidelines. The Community Resilience Centers Program funds planning and implementation grants to advance neighborhood resilience centers that provide shelter and resources during climate emergencies and also support year-round community services and programming. Approximately $55 million is available through the Safe Drinking Water, Wildfire Prevention, Drought Preparedness, and Clean Air Bond Act of 2024, commonly known as the Climate Bond, Proposition 4.
Reference: Guidelines, pp. 2 and 8-10

Implementation Grants are intended to fund new construction and retrofits of facilities to serve as Community Resilience Centers, as well as programs and services that build overall community resilience. Implementation Grant award amounts range from $1,000,000 to $10,000,000, and the grant term is six years.
Reference: Guidelines, p. 11

Staff is requesting authorization to begin the planning process necessary to evaluate whether the District should submit a competitive Implementation Grant application.

DISCUSSION

The Community Resilience Centers Program is intended to support facilities that can serve the community during emergency events and normal, non-emergency periods. Eligible facilities include senior and youth centers, park and recreation sites, libraries, health clinics, hospitals, schools, town halls, food banks, homeless shelters, childcare facilities, community centers, nonprofit facilities providing essential services, places of worship, fairgrounds, small business incubators, and commercial kitchens. CRC facilities must be publicly available year-round.
Reference: Guidelines, p. 30

Helendale has significant community resilience needs, including extreme heat, power outage impacts, wildfire smoke, rural isolation, limited emergency sheltering resources, senior population needs, and limited local access to health and emergency support services. A Community Resilience Center could provide services during emergency and climate-related events while also supporting recreation, senior programming, emergency preparedness, workforce training, community meetings, and public services throughout the year.

The Round 2 Guidelines state that Implementation Grant applications must include an eligible Lead Applicant and at least two Partners. At least one Partner must be a community-based organization and must be funded by the CRC Implementation Grant. The Guidelines strongly encourage more than two Partners.
Reference: Guidelines, p. 23

The Guidelines also require the Lead Applicant and Partners to engage in collaborative governance throughout the grant term. A Collaborative Governance Agreement must be developed and must address roles and responsibilities, dispute-resolution processes, financial relationships, procurement processes, transparent decision-making, resident and community-based organization involvement, nondiscrimination, and meeting procedures.
Reference: Guidelines, pp. 23 and 121

Because the project is complex and may involve significant design, engineering, cost, operational, and partnership decisions, staff recommends that the Board establish a two-member Board Ad Hoc Committee. The Ad Hoc Committee would serve in an advisory capacity only. It would not have authority to approve contracts, submit a grant application, accept grant funding, approve a final design, or authorize construction. Final authority would remain with the full Board of Directors.

The Ad Hoc Committee would:

- Review preliminary project concepts;
- Provide feedback on potential facility layout and programming;
- Discuss consultant needs and project readiness items;
- Review potential partner and community engagement strategies;
- Help identify issues that should be brought back to the full Board;
- Report recommendations to the full Board.

IMPORTANT PROGRAM REQUIREMENTS

Partner Requirements

Implementation Grant applications must include at least two Partners in addition to the Lead Applicant. At least one Partner must be a community-based organization and must be funded by the CRC Implementation Grant. *Reference: Guidelines, p. 23*

Community Engagement

Lead Applicants are required to work with community members and priority populations through direct engagement. Applicants must involve residents, organizations, and key Partners from the Project Area in all phases of the CRC project, from application through project development and implementation. *Reference: Guidelines, p. 66*

Collaborative Governance

Partnerships and collaborative governance are core requirements for all CRC grant types. A Collaborative Governance Agreement is required and must define governance, roles, responsibilities, financial relationships, procurement processes, transparent decision-making, public meeting procedures, and how residents and community-based organizations will be involved. *Reference: Guidelines, pp. 23 and 121*

Public Meetings

The Guidelines do not state a fixed number of public meetings. Instead, the Collaborative Governance Agreement must establish meeting facilitation procedures, including frequency of meetings, the minimum number of meetings open to the public, agenda publication, notes for public access, and consideration for location, virtual access, and language access. *Reference: Guidelines, p. 121*

Site Control and Readiness

For Implementation Grants, all sites that include capital improvements must demonstrate site control. *Reference: Guidelines, p. 69*

Financial Feasibility

Applicants must demonstrate that the project is financially feasible by submitting a draft project work plan and budget. If the expected project budget exceeds the requested CRC grant funds, applicants must identify leverage funding sources with supporting documentation and ensure that any funding gap is no more than 10% of the overall project amount. *Reference: Guidelines, pp. 73-74*

PROPOSED PLANNING PROCESS

If authorized, staff anticipates the following process:

Phase 1- Board Direction and Organization

- Review grant requirements and project readiness requirements.
- Establish two-member Board Ad Hoc Committee;
- Confirm project goals;

Phase 2- Professional Services

- Solicit proposals for engineering
- Return to the Board for approval of consultant agreements as required by the District Purchasing Policy.

Phase 3- Project Development

- Develop preliminary facility programming;
- Prepare conceptual site layout;
- Prepare preliminary concepts;
- Develop preliminary cost estimates;

Phase 4- Partnership and Community Engagement

- Identify required project Partners;
- Develop draft Collaborative Governance Agreement.

Phase 5- Board Review

- Staff will return to the Board with:
    - Project concept and draft grant application
    - Preliminary design and engineering information;
    - Estimated project budget;
    - Partner recommendations;
    - Community engagement strategy;

FISCAL IMPACT

Approval of this item does not authorize construction and does not commit the District to accepting grant funding. Implementation Grant awards range from $1,000,000 to $10,000,000. The Guidelines do not identify a match requirement; however, applicants must demonstrate financial feasibility. If the total project budget exceeds the requested CRC grant funds, the District must identify funding sources and ensure that any funding gap is no more than 10% of the overall project amount. *Reference: Guidelines, pp. 11 and 73-74*

ATTACHMENTS

Attachment A: Community Resilience Centers Program Round 2 Grant Guidelines

Community Resilience Centers Program

Round 2 Program Guidelines

CALIFORNIA STRATEGIC GROWTH COUNCIL

April 29, 2026

Final Guidelines

Program information can be accessed at: https://sgc.ca.gov/programs/community-resilience-centers/

To sign up to receive notices, updates, and information regarding the Community Resilience Centers Program (and other California Strategic Growth Council (SGC) grant programs and initiatives), visit the SGC website and click on the "E-list" link at: http://sgc.ca.gov/.

What is the Community Resilience Centers Program

*From extreme heat to wildfires, recent climate events and public health emergencies impact every part of California. The best available projections anticipate that these climate impacts will intensify. In the face of these challenges, strengthening resilience requires investments in both physical and social infrastructure. In addition to climate resilience activities, **community resilience** builds ongoing social cohesion, trust, and networks***.**

The Community Resilience Centers (CRC) Program:

- Funds the planning, construction, and retrofit of community resilience centers across California's diverse communities
- Advances communities' capacity to plan for long-term resilience and acute emergencies
- Encourages meaningful engagement, cross-sectoral collaboration, community-based partnerships, and shared governance and decision-making models
- Mitigates the public health impacts of extreme heat and other emergency situations exacerbated by climate change
- Prioritizes projects located in and benefiting under-resourced, rural, unincorporated, and Tribal communities across geographically diverse regions in the state of California

What activities does the CRC Program fund?

The CRC Program funds Planning and Implementation Grants that advance the development of neighborhood resilience centers that provide shelter and resources during climate emergencies. It also supports year-round community services and programming.

How much funding is available?

Approximately $55 million is available. The funding is from the Safe Drinking Water, Wildfire Prevention, Drought Preparedness, and Clean Air Bond Act of 2024, commonly known as the "Climate Bond." (Proposition 4)

Who is eligible to apply?

In Round 2, Lead Applicants must be a public or local agency, nonprofit organization, special district, joint powers authority, Tribe, public utility, local publicly owned utility, or mutual water company.

Priority Communities

<u>All</u> communities are eligible for CRC Program funds. However, in alignment with the Climate Bond's funding goals, Round 2 of the CRC Program will prioritize investments in the communities most burdened by environmental, socioeconomic, and health inequities. Priority communities include under-resourced (low-income, disadvantaged, and severely disadvantaged) communities, Tribes, rural communities, and unincorporated communities.

How do you apply?

- Spring 2026: Final Round 2 Program Guidelines released
  - Eligible applicants can complete a Technical Assistance Request Form
  - Notice of Funding Availability (NOFA) released
- Summer 2026: Application Period
  - Applications open via the online platform Submittable
  - Complete application for appropriate grant type by due date stated in NOFA
  - Applications due via Submittable
- Fall and Winter 2026-27: Application review
  - SGC will notify applicants who are deemed ineligible or fail threshold review
  - Notified applicants with incomplete applications will have up to three days to submit missing documentation
  - Final applications and requested materials due via Submittable
  - Top-scoring applicants invited for an interview
- Spring 2027: Awards

For more information:

Visit *https://sgc.ca.gov/grant-programs/crc/* and sign-up for out email list at CRC Mailing List or email *crc@sgc.ca.gov.*

Table of Contents

How to use this document

These Final Program Guidelines govern the California Strategic Growth Council's (SGC) Community Resilience Centers (CRC) Program Round 2. This document includes information on the two available grant types:

- Planning Grants
- Implementation Grants

All information in this document applies to both grant types unless specifically stated otherwise. Please read all relevant sections.

This document is not the only source of information on CRC requirements. The forthcoming Notice of Funding Availability (NOFA), application, and application instructions contain additional requirements, relevant information, and resources for applicants. For updates, please reference the CRC Program timeline on the CRC Program webpage at https://sgc.ca.gov/grant-programs/crc/.

To help readers use this document, we include icons next to section headers for sections that are only relevant to a specific grant type (Ⓟ for Planning Grants or Ⓘ for Implementation Grants). If there is a difference between text and icon placement, use the text as your guide.

Sections relevant to both grant types will be structured as follows:

Example header

Brief introduction describing this portion of the Program Guidelines

All Grant Types

Information that applies to all grant types. All applicants must read this section.

Planning Grants Ⓟ

Information that only applies to Planning Grants.

Implementation Grants Ⓘ

Information that only applies to Implementation Grants.

Some sub-sections are omitted and/or combined as appropriate.

CALIFORNIA STRATEGIC GROWTH COUNCIL

Section 1: Program Overview

Summary of Section 1

The Community Resilience Centers (CRC) Program was created in 2021 to develop and build Community Resilience Centers that mitigate the public health impacts of extreme heat and other emergency situations exacerbated by climate change. Round 2 of the CRC Program will fund Planning and Implementation Grants through the Safe Drinking Water, Wildfire Prevention, Drought Preparedness, and Clean Air Bond Act of 2024, which is also known as the "Climate Bond." Funding amounts for each grant type will be announced in the Notice of Funding Availability (NOFA).

1.1 Background

Context

Recent climate and public health emergencies have impacted every part of California, underscoring the need for effective planning, preparation, and adaptation. Some impacts are acute events, like earthquakes, extreme heat, floods, mudslides, power outages, storms, and wildfires. Some impacts are longer-term events like the COVID-19 pandemic, drought, rising temperatures, and sea level rise. Climate science projections published by the National Aeronautics and Space Administration (NASA) anticipate that these climate impacts will worsen and compound. In the face of these challenges, strengthening resilience requires investments in both physical and social infrastructure.

Because some neighborhoods have experienced systemic underinvestment for many years, communities across California do not have equal access to affordable clean energy, water infrastructure, emergency response services, and public health resources. Given California's diverse landscapes, populations, and infrastructure, resilience will look different across the state. To build resilience, community priorities must drive local infrastructure projects. Robust, meaningful, and culturally appropriate engagement helps ensure that projects reflect community priorities and benefit local residents.

As a Cabinet-level interagency organization housed within the California Governor's Office of Land Use and Climate Innovation (LCI), SGC advances the State's key policy priorities through four main categories: investment programs, collaborative policy initiatives, integrated policy and planning, and capacity building and technical assistance. The Community Resilience Centers (CRC) Program is one of SGC's community investment programs. Alongside other statewide efforts, the CRC Program aims to build local resilience across California communities. The program is designed to serve community needs and strengthen overall resilience in neighborhoods across California.

Budget and Legislative Background

The CRC Program was created as a part of California's 2021-2022 Climate Budget Package. The budget focuses on addressing wildfire and drought, strengthening community resilience, promoting sustainable agriculture, and advancing the state's climate goals.

Senate Bill (SB) 155 (Committee on Budget and Fiscal Review, Public resources trailer bill, Chapter 258, Statutes of 2022) authorized "funding ... for the construction or retrofit of facilities to serve as Community Resilience Centers that mitigate the public health impacts of extreme heat and other emergency situations exacerbated by climate change." This enabling statute names specific functions for resilience centers, including hydration stations, cooling centers, clean air centers, respite centers, and community evacuation and emergency response centers. SB 155 also specifies that the program will fund: physical infrastructure elements critical to emergency response facilities during climate or other disasters; long-term resilience efforts; and the integrated delivery of services. Finally, SB 155 requires that community-based organizations (CBOs) and local residents participate in CRC Project governance and decision-making through partnerships and mandates a public process for guidelines development to allow for transparency and public input.

In addition to SB 155, the following legislation governs the CRC Program:

- Assembly Bill (AB) 179 (Ting, Chapter 249, Statutes of 2022): Amends the Budget Act of 2022 and allocates additional funds for CRC program administration and staffing, technical assistance, and monitoring and evaluation. The 2022-2023 Budget Change Proposal (BCP) "Addressing Extreme Heat" notes: "SGC funds will also support programs associated with building community level social infrastructure that could support better functioning resilience centers." The BCP commits to funding "services and programming that build the community infrastructure necessary to respond quickly and effectively in times of crisis." The BCP highlights the importance of community-serving locations, prioritizing disadvantaged and low-income communities in both urban and rural areas, providing technical assistance for those priority communities, and providing both planning and implementation grants.
- AB 211 (Committee on Budget and Fiscal Review, Chapter 574, Statutes 2022) codifies language for the CRC Program and authorizes the CRC Program to provide advance payment. AB 211 directs the CRC Program to ensure funded Community Resilience Centers provide eligible services and amenities year-round to community residents, for a minimum number of years. AB 211 also directs SGC staff to prioritize projects in and benefitting under-resourced communities and consider statewide geographic diversity. Lastly, AB 211 provides details on reporting requirements to the Legislature.

In November 2024, California voters passed Proposition 4, a $10 billion General Obligation Bond, called the Safe Drinking Water, Wildfire Prevention, Drought Preparedness, and Clean Air Bond Act of 2024. Commonly called the "Climate Bond," it authorizes various state agencies to provide funding for a wide variety of programs and investments to reduce environmental risks to California communities.

The Climate Bond prioritizes keeping communities safe from climate risks by funding:

- The development of Community Resilience Centers across diverse regions of the state that will prepare and protect people from extreme heat.
- The coordination and delivery of emergency response services during disruptions, including disasters, states of emergency, local emergencies, or de-energization events.
- The inclusion of community-based organizations and residents in decision-making processes and administration.

This funding provides additional support to the CRC Program's work to protect communities against risks associated with extreme heat.

1.2 Program Summary

SGC expects to receive $60 million from the Climate Bond to implement the CRC Program through the provision of grants, staff support, and third-party technical assistance. Of the total funds, $55 million will be available for Round 2 grants.

The CRC Program will offer **Planning Grants** and **Implementation Grants**. Unlike Round 1, the CRC Program will not offer a separate Project Development Grant type. Instead, Round 2's Implementation Grant will offer a new, funded "Pre-Development Phase" that will support Lead Grantees' project readiness before implementation. The Pre-Development Phase will last no more than one year from grant execution.

SGC retains the right to make partial awards and to reallocate funds between CRC Round 2 grant types in the event of undersubscription, ineligibility, or recission of award.

Applicants may apply for multiple funding programs to accomplish the same scope of work. However, awarded applicants will only be able to receive full funding from the one award. If selected for more than one award, SGC will work with applicants to modify the scope of work to eliminate duplication of funding.

Planning Grants Ⓟ

- **Grant Purpose:** Planning Grants will fund communities in the initial stages of CRC project development. Grant activities will prepare grantees for future funding to build or renovate resilience centers.
- **Examples of Eligible Activities:** Community engagement; creating relevant plans (e.g., Emergency Operations, Climate Adaptation); evaluating and updating policies and codes; capacity building
- **Award Amount:** $100,000 to $500,000
- **Grant Term:** Two years, with the option to extend on a case-by-case basis
- **Planning Area:** Area inclusive of the planned CRC Site, the proposed planning activities, and the impacted community around the proposed site
- **Special Requirements:** Must develop and complete:

- **Community Engagement Plan (CEP):** Due within the first six months of the grant term (*See Section 7.4 Community engagement*)
- **Collaborative Governance Structure and fully executed Collaborative Governance Agreement:** Due by the end of the first year of the grant term (*See Section 7.5 Collaborative Governance*)
- **Demonstrate ability to gain site control:** Due 90 days prior to the end of the grant term (*See Section 7.6 Site control and readiness*

For more information about the Planning Grant objectives and eligible activities, see *Section 4: Planning Grants*.

Implementation Grants I

- **Grant Purpose**: Implementation Grants will fund new construction and retrofits of facilities to serve as Community Resilience Centers, as well as programs and services that build overall community resilience.
- **Examples of Eligible Activities**: Construction, retrofits, and other upgrades to the CRC Facility itself; Campus Amenity improvements; programs and services; community engagement
- **Award Amount**: $1,000,000 to $10,000,000
- **Grant term**: Six years
- **Project Area:** The physical location of the CRC Facility(ies), Campus Amenities, and Partner Sites offering services or programs (See *Section 1.1 Background*)
- **Special Requirements**:
    - Grantees must meet Facility and Features Requirements (See *Section 5.4 Implementation Grant requirements*)
    - The CRC Facility must remain dedicated to service as a Community Resilience Center for a minimum of 15 years (See *Section 7.8 Long-term use of the CRC Facility*)
    - Finalized CRC Emergency Plan and Community Resilience Plan - due 90 days prior to the end of the Implementation Phase (prior to Evaluation Phase) (See *Section 7.9 CRC Emergency Plan and Community Resilience Plan*)

1.3 Program Objectives

The program objectives inspire and guide the CRC Program's overall design and implementation. As such, all applicants should reference the program objectives when crafting their applications and implementing their projects.

The CRC Program objectives are to:

- Fund the planning, construction, and/or retrofit of Community Resilience Centers across California's diverse communities

- Advance the capacity of communities to respond to and recover from emergencies as they build long-term resilience with investments in physical and social infrastructure
- Support meaningful engagement, cross-sectoral collaboration, community-based partnerships, and shared governance models
- Mitigate the public health impacts of extreme heat and other emergencies exacerbated by climate change
- Prioritize projects located in and benefiting under-resourced (low-income, extremely low-income, disadvantaged, severely disadvantaged), rural, unincorporated, and Tribal communities across geographically diverse regions in the state of California

1.4 Program Approach

Vision for a Better California for All

SGC is committed to advancing racial equity in its operations, investments, and policy initiatives; as well as advancing its vision that: All people in California live in healthy, thriving, and resilient communities regardless of race.

Vision for Resilience

SGC's CRC Program intends to build both *climate resilience* and *community resilience* across California.

The CRC Program defines these terms as:

- **Climate resilience** is the capacity of any entity—an individual, a community, an organization, or a natural system—to prepare for climate impacts, recover from disruptions, and adjust over time to be able to better handle future challenges. Climate resilience is strengthened locally through specific strategies and activities that help prepare areas for climate impacts including drought, extreme temperatures, floods, sea level rise, and wildfires.
- **Community resilience** is the ability of communities to withstand, recover, and learn from adverse events (climate or otherwise) and to strengthen future response and recovery efforts. Strengthening community resilience requires a broad approach that addresses challenges across public health; social and economic equity; community well-being; multi-sector coordination in disasters preparedness, response, and recovery; and the development of social cohesion and community trust. Activities that build community resilience will in turn increase resilience to climate-related impacts.

Core Components

The CRC Program focuses on funding projects that address the specific needs of neighborhoods across the state. Each project must align with the priorities, assets, and objectives of its community. While the CRC Program model is intentionally flexible to account for the vast spectrum of communities across California, the Program's core components include:

- **Place-based approach:** A place-based approach allows the State to make significant, targeted investments that meet multiple needs of burdened communities. It also empowers communities to tackle climate change and equity challenges at a neighborhood scale. Communities propose systemic solutions to address their neighborhood's specific needs and assets.
- **Integrated physical and social infrastructure investment:** The program funds retrofits and new construction of facilities and accompanying campus amenities. The program also funds community resilience programming and services which build social cohesion. CRC Projects should balance shorter-term needs and longer-term needs, equip CRC Sites with emergency activation capabilities and plans, and include year-round services and programs that build community resilience.
- **Partnerships and Collaborative Governance:** Applicants are required to create "Collaborative Governance Structures" that bring together public agencies, community-based organizations, residents, and other local entities to create long-term investment in the community's vision for resilience.
- **Community engagement and participation:** CRCs should prioritize the local priority populations and the residents most vulnerable to climate change in their decision-making, design, and implementation.

1.5 Investing in Priority Communities and Populations

Some residents and communities face higher risks from climate change and have fewer resources to manage climate impacts. These disproportionate effects are caused by physical, social, political, and/or economic factor(s), which are further exacerbated by the changing climate. Many of these challenges result from a history of inequitable land use and zoning policies, underinvestment, and lack of meaningful engagement with community residents in planning and policy decisions.

Consistent with existing State guidance and robust public input, eligible applicants from all communities may apply for CRC Program funds. However, the CRC Program will prioritize investments in the following **priority communities** which are most burdened by environmental, socioeconomic, and health inequities.

Statewide: Priority Communities

SGC prioritizes CRC Projects that are located in and benefit priority communities. These definitions do not determine eligibility for the CRC Program. (See *Section 3: Eligibility*)

Priority communities include **under-resourced communities.** For Round 2 of the CRC Program, under-resourced communities are communities located within:

- An area identified as disadvantaged or severely disadvantaged using the Climate Bond Mapping Tool[1]; OR
- Census tracts identified as disadvantaged by the California Environmental Protection Agency via the Office of Environmental Health Hazard Assessment's CalEnviroScreen 4.0 tool (CA EPA 2021 update)[2]

To be considered for priority community status, the CRC Facility must be located within an under-resourced community as defined above.

In addition to prioritizing under-resourced communities, the following communities are priorities for CRC Program funding: (See *Section 8.4 Funding priorities and Priority Points*)

- **Tribes**, defined as a federally recognized Native American Tribe or non-federally recognized Native American Tribe listed on the California Tribal Consultation List maintained by the Native American Heritage Commission on February 19, 2026.
- **Tribally-owned nonprofits** refers to an organization exempt from taxation under Internal Revenue Code 501(c)(3) (26 U.S.C. § 501(c)(3)), a nonprofit incorporated under Tribal law, a California nonprofit public benefit corporation (Corp. Code, § 5110 et seq.), or an equivalent entity that has a majority Tribal-led board, is operated by a Tribe, and advances the Tribe's goals and priorities. The Tribe must be a *California Native American Tribe* (see *Appendix A: Terms and definitions*), Tribally-owned nonprofits are required to provide a Letter of Authorization or Resolution on behalf of the Tribe they represent.
- **Rural communities** are communities that fall within a non-metropolitan area or an area not designated as urban by the U.S. Census Bureau. When the CRC Facility is located within a rural community that meets the CRC definition of an under-resourced community, the CRC application is considered a priority community.
    - **Note:** SGC will determine priority status for communities during the threshold phase. If a community is designated as 'urban' utilizing the U.S. Census Bureau definition, they may appeal that designation provided they meet the definition under Health and Safety Code 50199.21 and provide suitable and timely documentation in their appeal.
- **Unincorporated communities** that meet the definition of an under-resourced community using any of the definitions outlined above. When the CRC Facility is located within an unincorporated community that meets the CRC definition of an under-resourced community, the CRC application is considered a priority community.

See *Appendix A: Terms and definitions* for more detailed definitions of some of the above.

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[1] Climate Bond (Proposition 4) (S)DAC Status, available at: https://experience.arcgis.com/experience/aa723fdf521a44c9a428f1a46cd38a09/page/More-Info
[2] Office of Environmental Health Hazard Assessment: SB 535 Disadvantaged Communities 2022, available at: https://experience.arcgis.com/experience/1c21c53da8de48f1b946f3402fbae55c/page/SB-535-Disadvantaged-Communities

Neighborhood Scale: Priority Populations

The CRC Program is structured to provide existing residents, businesses, and communities with the tools and resources to drive change and to ensure they experience the benefits of this investment. Each CRC application, regardless of priority community status or geography, must focus on neighborhood-scale investments in communities.

In alignment with the California Governor's Office of Emergency Services (Cal OES) and other State agencies, the CRC Program has identified the following priority populations:

- Individuals with physical, developmental, or intellectual disabilities
- Individuals with chronic conditions or injuries
- Individuals with limited English proficiency
- Older adults, children, and pregnant people
- Low-income, homeless, and/or transportation-disadvantaged or public transit-dependent people

Note: These priority populations were previously described as Access and Functional Needs (AFN) communities by Cal OES.[3]

Each CRC application must identify, work with, and intentionally serve the needs of priority populations in the neighborhood containing the proposed CRC Site. Attention to priority populations appears in multiple parts of the CRC Program design. These populations should be addressed within the following areas:

- Collaborative Governance Structure
- Capital projects, Campus Amenities, and Services and Programs
- CRC Emergency Plan and Community Resilience Plan
- Evaluation Phase

Reviewers will evaluate the extent to which each application meaningfully incorporates and benefits priority populations in their communities.[4] (See *Section 8: Application and scoring*)

1.6 Funding Priorities

Tribal applicants, under-resourced communities, under-resourced rural and/or unincorporated communities, and previous SGC or LCI grantees may be eligible for prioritization through the following mechanisms:

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[3] California Governor's Office of Emergency Services (Cal OES). 2022. Access and Functional Needs (AFN). <https://www.caloes.ca.gov/office-of-the-director/policy-administration/access-functional-needs/>

[4] California Governor's Office of Emergency Services. 2020. Integrating Access and Functional Needs within the Emergency Planning Process: Best Practices for Stakeholder Inclusion. <https://www.caloes.ca.gov/wp-content/uploads/AFN/Documents/AFN-Library/Cal-OES-Best-Practices-for-Stakeholder-Inclusion-June-2020.pdf>

- **Tribal Funding Goal**: SGC intends to award at least one Planning Grant and one Implementation Grant to an eligible application from a California Native American Tribe or a Tribally-owned nonprofit (collectively referred to as Tribal applicants).
- **Geographic Diversity Funding Goal**: SGC intends to consider geographic diversity in final award decisions using the Cal OES Fire and Mutual Aid Region. SGC aims to make one Planning Grant Award in each Cal OES Fire and Mutual Aid Region.
- **Priority Points**: Eligible applications representing Tribal applicants, under-resourced communities (including DACs and SDACs as defined by the Climate Bond), under-resourced rural and/or unincorporated communities, or previous SGC or LCI grantees will receive additional points if they meet certain requirements.

Please see *Section 8.4 Funding priorities and Priority Points* for more information on funding priorities and Priority Points.

Section 2: California Native American Tribes and Tribal Applicants

Summary of Section 2

- California Native American Tribes and Tribally-owned nonprofits are eligible applicants and will collectively be referred to as "Tribal applicants."
- The CRC Program has established a Tribal Funding Goal to award a minimum of one eligible Planning Grant and one Implementation Grant where the Lead Applicant is a Tribal applicant.
- Tribal applicants receive Priority Points.
- Tribal applicants receive additional flexibility in several program and Application Requirements.
- Tribal applicants are eligible for Technical Assistance during the application process and grant term.

2.1 Important Terminology

- **"California Native American Tribe"** means either a federally recognized Native American Tribe or a non-federally recognized Native American Tribe listed on the California Tribal Consultation List maintained by the Native American Heritage Commission as of February 19, 2026.
- **"Tribally-owned nonprofit"** refers to an organization exempt from taxation under Internal Revenue Code 501(c)(3) (26 U.S.C. § 501(c)(3)) [5], a nonprofit incorporated under Tribal law, a California nonprofit public benefit corporation (Corp. Code, § 5110 et seq.) [6], or an equivalent entity that has a majority Tribal-led board, is operated by a Tribe, and advances the Tribe's goals and priorities. A Tribal nonprofit is required to provide a Letter of Authorization or Resolution on behalf of the Tribe they represent.
- **"Tribal applicants"** refers to applicants whose Lead Applicant is a California Native American Tribe or a Tribally-owned nonprofit.

Please see *Section 3.1 Eligible applicants* for more details on applicant eligibility and *Appendix A: Terms and definitions* for full definitions of "California Native American Tribe", "Tribally-owned nonprofit", and "Tribal applicant".

[5] Internal Revenue Code 501 (c)(3) (26 U.S.C. § 501(c)(3), available at: https://www.irs.gov/charities-non-profits/charitable-organizations/exemption-requirements-501c3-organizations
[6] Corporations Code, § 5110 et seq., available at: https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=CORP&sectionNum=5110.

2.2 Limited Waiver of Sovereign Immunity

If a Tribe receives CRC grant payments on a reimbursement basis from SGC, Tribes will not be required to sign a Limited Waiver of Sovereign Immunity. If a Tribe receives CRC grant payments via advance payment, SGC **may require** a Limited Waiver of Sovereign Immunity. CRC is committed to working collaboratively with Tribes to tailor the terms of a Limited Waiver of Sovereign Immunity to support Tribal priorities while also meeting the State's obligations under the law. Tribes who are Partners should decide with the Lead Applicant if they will need to sign a Limited Waiver of Sovereign Immunity before applying.

2.3 Tribal Funding Goal and Priority Points

SGC intends to fund a **minimum** of one eligible Planning Grant application and one eligible Implementation Grant application where the Lead Applicant is a California Native American Tribe or Tribally-owned nonprofit.

Applications submitted by Tribal applicants will receive full Priority Points. Additionally, if a Lead Applicant is a nonprofit whose mission is primarily focused on serving Tribal communities, and the grant activities are primarily focused on serving Tribal communities, the applicant will receive partial Priority Points. See *Section 1.6 Funding Priorities* , *Section 8.4 Funding Priorities and Priority Points,* and *Appendix A: Terms and Definitions* for additional details.

2.4 Tribal Modifications

SGC intends for the CRC Program to be accessible and relevant to Tribes. Some sections of these Program Guidelines contain greater flexibility for Lead Applicants who are California Native American Tribes or Tribally-owned nonprofits. (See *Appendix A: Terms and Definitions*) Tribal applicants will be able to submit modifications via the online application platform.

The following sections contain information on the special considerations and eligible modifications available for California Native American Tribes, Tribally-owned nonprofits, or projects located on Tribal lands. Tribal applicants may submit modifications to certain requirements on a case-by-case basis, including:

- Collaborative Governance (See *Section 3.2 Collaborative Governance Structure*)
- Community engagement (See *Section 7.4 Community Engagement*)
- Coordination with the County Office of Emergency Services (See *Section 5.4 Implementation Grant Requirements*)
- CRC Facility Requirements (See *Section 5.4 Implementation Grant Requirements*)
- CRC Partner Requirements (See *Section 3.1 Eligible Applicants*)
- Evaluation (See *Section 9.7 Implementation Grant Evaluation*)
- Financial or Management Capacity (See *Section 7.3 Applicant Capacity*)
- Indirect cost rate (See *Section 6.1 Eligible Costs*)
- Permitting and Environmental Compliance (*See Section 7.7 Permitting and Environmental Compliance*)

- Restricted fee lands (See *Section 3.3 Eligible Planning and Project Areas*)

For questions on Tribal modifications, please email CRC@sgc.ca.gov.

2.5 Data Sovereignty

SGC is committed to honoring Tribal data sovereignty, and the CRC Program reflects this commitment by collaborating with Tribal communities throughout all phases of program development. The CRC Program seeks to align with the CARE Principles for Indigenous Data Governance (Collective Benefit, Authority to Control, Responsibility, and Ethics) to ensure that data pertaining to Tribal communities is managed in a manner consistent with Tribal rights and governance.

Tribal data and Traditional Ecological Knowledge may be excluded from project deliverables to protect confidentiality. SGC will work with the Lead Grantee to ensure a clear process for excluding confidential Tribal data in the Grant Agreement.

Under California Government Code Section 8450, any record containing financial information submitted by Tribes to fulfill obligations as party to a Grant Agreement under this program will be confidential, will not be a public record, and will not be open to public inspection.

2.6 Tribal Notification

To formally acknowledge the land and the Indigenous peoples of the land where the project is taking place, Lead Applicants should notify surrounding Tribes of their project. When appropriate and desired by all parties, applicants are encouraged to engage in consent-based collaboration that is flexible, equitable, culturally appropriate, and respectful during the application development and throughout the grant term.

SGC staff will notify Tribes of all applications received. SGC will notify California Native American Tribes listed on the Native American Contact List maintained by the California Native American Heritage Commission (NAHC) on February 19, 2026. SGC will send this notification via email a minimum of 60 days before the California Strategic Growth Council (SGC) approves awards. If you are a Tribe that is not currently on the NAHC contact list and wish to be notified, please contact CRC Program staff at CRC@sgc.ca.gov.

Notification is intended to:

- Inform Tribes of proposed projects in their regions
- Ensure transparency in the application process
- Include Tribal input where ancestral lands are concerned
- Avoid impacts on cultural sites and resources
- Support coordinated efforts toward the protection of the land

These notifications will include the following project information:

- Brief project description
- Project or Planning area and proposed CRC Site

- Funding amount requested
- Lead Applicant and Partners
- Contact information for Lead Applicant
- Instructions on how to contact SGC or the Lead Applicant regarding a proposed project
- A timeline for submitting any comments or concerns on an application to SGC
    - This timeline is necessary to ensure the Council can consider feedback before making award decisions.

SGC will work with Tribes to address concerns raised with policies included in the CRC Program Guidelines and operating statutes. SGC will determine next steps on a case-by-case basis if any concerns are unaddressed at the time an application is recommended for funding.

2.7 Technical Assistance

SGC will provide technical assistance to California Native American Tribes and Tribally-owned nonprofits during the application process. SGC also intends to provide Pre-Development and Implementation Technical Assistance during the grant term. (See *Section 10: Technical Assistance*)

Section 3: Eligibility

Summary of Section 3

- Planning Grant applications must include an eligible Lead Applicant and at least one Partner.
- Implementation Grant applications must include an eligible Lead Applicant and at least two Partners. At least one Partner must be a community-based organization.
- Tribal applicants may have some exceptions for partnership requirements.
- Implementation Grants require that Lead Applicant and Partners engage in collaborative governance throughout the grant term.
- Applicants must select a Planning or Project Area where grant activities will take place.
- Each application must include an eligible Lead Applicant, eligible Partners, and an eligible Planning or Project Area.

3.1 Eligible Applicants

For all CRC Program grants, the **Lead Applicant** will collaborate with one or more **Partners**. Together, the Lead Applicant and Partners are referred to as "applicants." The Lead Applicant will submit one application on behalf of the applicant team. They will be required to establish a Collaborative Governance Structure codified in a Collaborative Governance Agreement. (*See Section 3.2 Collaborative Governance Structure* and *Section 7.3 Applicant Capacity*)

A Lead Applicant must be based in California and must be one of the following:

- California Native American Tribes
- Tribally-owned nonprofits
- IRC 501(c)(3) tax-exempt nonprofit organization
- Public agency
- Local agency
- Special district
- Joint powers authority
- Public utility
- Local publicly owned utility
- Mutual water company

See *Appendix A: Terms and definitions* for definitions of some of the above eligible applicants.

Private shareholder corporations are not eligible as Lead Applicants or funded Partners.

Documentation of Support

Public agencies serving as a Lead Applicant are required to provide either evidence of an adopted formal resolution or documentation showing a delegated authority to bind the agency (i.e., authorization of a specific individual or position to legally commit the agency). This includes authorization to apply for and receive program funds and execute all documents and activities related to the grant, if awarded.

Tribal applicants

California Native American Tribes serving as Lead Applicant are required to provide a Letter of Authorization or Resolution approved by Tribal Council that authorizes the Tribe to apply for and receive program funds and execute all documents and activities related to the grant, if awarded.

Tribally-owned nonprofits serving as a Lead Applicant are required to provide a Letter of Authorization or Resolution on behalf of the Tribe they represent that authorizes the nonprofit to apply for and receive program funds and execute all documents and activities related to the grant, if awarded.

For Tribal applicants a Letter of Authorization or Resolution must be approved by Tribal Council and provided at the time of application.

Partner Requirements

Applications should demonstrate strong and diverse partnerships rooted in their community. Diverse partnerships include a mix of groups that bring different experiences, perspectives, skills and knowledge. Given the highly localized and community-driven nature of the CRC Program, the composition of partnerships will be evaluated within their local, community context. Applicants will be required to submit an explanation of the partnership structure and roles and responsibilities of each Partner.

All awarded Lead Applicants will be required to ensure their Partners comply with relevant program requirements

Tribal applicants

California Native American Tribes and Tribally-owned nonprofits (See *Appendix A: Terms and Definitions*) will not be evaluated on the inclusion of non-Tribal entities. Tribal applicants instead must demonstrate broad support and involvement from entities and individuals within the Tribe.

A California Native American Tribe or Tribally-owned nonprofit (as defined in *Appendix A: Terms and Definitions*) applying as a Lead Applicant is typically not required to have Partners. However, the Lead Applicant will still need Partners if the application includes other entities who will be leading aspects of the grant-funded work (such as a capital project activity in an Implementation Grant). In this case, the other entities should be included as Partners. This includes any other Tribes included in your application.

If a Tribal Applicant does not have funded Partners, they will need to demonstrate they have established, or plan to establish, working relationships with any Tribal entities and/or individuals involved in governance of the project. (See *Section 3.2 Collaborative Governance Structure* and *Appendix B: Collaborative Governance Requirements*)

Partner Requirements for Planning Grants P

For **Planning Grants**, each application must include at least one Partner in addition to the Lead Applicant. The CRC Program strongly encourages more than one Partner. Awarded grantees may add additional Partners through the procedures outlined in the Collaborative Governance Structure as needs arise. (See *Section 3.2 Collaborative Governance Structure*)

All Partners are required to comply with the relevant program requirements

Partner Requirements for Implementation Grants I

For **Implementation Grants**, each application must include at least two Partners in addition to the Lead Applicant. At least one of these Partners or the Lead Applicant must be a community-based organization and must be funded by the CRC Implementation Grant. The CRC Program strongly encourages more than two Partners. Awarded grantees may add additional partners through the procedures outlined in the Collaborative Governance Structure as needs arise. (*See Section 3.2 Collaborative Governance Structure*)

Past Grantees

Past grantees which are eligible to receive funding under the Climate Bond may be eligible applicants. (*See Section 3.1 Eligible applicants*)

Eligible applicants include:

- **Organizations that received a CRC grant in an earlier round** are eligible to apply again.
- **Lead Grantees from Round 1** may apply as Lead Applicants or Partners to Round 2, if they demonstrate the capacity to administer both grants.
- **Partners on Round 1 grants** may apply as Lead Applicants or be included as Partners.
- **Organizations from the same jurisdiction as an existing CRC Implementation Grant** are eligible to apply.

Although past grantees may be eligible as described above, SGC will consider geographic diversity in final award decisions and will prioritize Implementation Grants whose Project Areas do not overlap with Round 1 CRC Implementation Grantees' Project Areas.

Eligibility does not equal competitiveness. For example, an organization that was previously awarded a Planning Grant in a certain Planning Area may not be competitive for another Planning Grant in the adjacent area.

3.2 Collaborative Governance Structure

Partnerships and collaborative governance are core requirements for all CRC grant types and are essential to achieving community-driven resilience projects.

The CRC Program requires a **Collaborative Governance Structure** (CGS, known as a Collaborative Stakeholder Structure in Round 1). The CGS helps form local, diverse partnerships that foster long-term investment in the community. The CGS is designed to overcome challenges of shared decision-making and to build robust community governance.

Specifically, this structure helps ensure consistent buy-in and support; shared values and governance; accountability; and alleviation of existing power imbalances that may skew input and decisions, especially under time and resource constraints or emergency conditions.

The **Collaborative Governance Agreement** (CGA, known as the Partnership Agreement in Round 1) describes the governance, organization, and financial relationships of the CGS. Once signed by all parties, the Collaborative Governance Agreement formalizes the CGS. For Implementation Grants, the CGA will govern implementation of the entire CRC grant.

At a minimum, the Collaborative Governance Structures must include:

- Lead Grantee
- Partner(s)
- Community residents

The Partners involved in the CGS should be located in, serve, and represent the needs of the community within the defined Planning or Project Area. Additionally, members of the CGS should have an active role in the selection, planning, and all subsequent phases of the project. Applicants should reserve funding to compensate Partners and residents for their role in the CGS.

To formally acknowledge the land and the Indigenous peoples of the land where the project is taking place, applicants should notify surrounding Tribes of their project. See *Section 2.6 Tribal Notification* for requirements and procedures. If desired by all parties, applicants should engage in consent-based collaboration that is flexible, equitable, culturally appropriate, and respectful during the application development and throughout the grant term. (See *Appendix B: Collaborative Governance Requirements*)

Requirements by Grant Type

All Grant Types

The Collaborative Governance requirements vary across grant types. After a grant is awarded, all members of the Collaborative Governance Structure must participate in an SGC-led collaborative governance training focused on best practices.

Tribal applicants

The CRC Program is dedicated to respecting Tribal sovereign status throughout every stage of program development and implementation. For CRCs on Tribal land, requirements for "public" should be interpreted to apply to that Tribal community and not to the public beyond that Tribal community. (See *Section 2: California Native American Tribes and Tribal applicants* and *Appendix B: Collaborative Governance requirements*)

Planning Grants Ⓟ

Planning Grant applicants must propose a diverse list of Partners and describe a vision for their Collaborative Governance Structure that is aligned with the CRC proposal. While a full and formal Collaborative Governance Agreement is **not** required for Planning Grants when they apply, they will develop a CGS and execute a Collaborative Governance Agreement during their grant term.

For **Tribal applicants** where the Lead Applicant does not have any Partners, there are no further Collaborative Governance requirements beyond what is included in the application.

Please see *Section 7.5 Collaborative Governance* and *Appendix B: Collaborative Governance Requirements* for more information about Planning Grant program requirements.

Implementation Grants Ⓘ

For Implementation Grants, the Lead Applicant and Partners must form a Collaborative Governance Structure and collectively submit one application.

Applicants are required to include residents in the Collaborative Governance Structure. This requirement can only be waived if there are extenuating circumstances and the waiver is approved by SGC. For CRCs on Tribal land, requirements for "public" should be interpreted to apply to that Tribal community and not to the public beyond that Tribal community. Lead Applicants who are California Native American Tribes or are Tribally-owned nonprofits may have additional flexibility in meeting Collaborative Governance Structure requirements.

All applicants must develop a Collaborative Governance Agreement (CGA) Worksheet that outlines the roles and responsibilities of all Collaborative Governance Structure members and decision-making processes. Interagency review panelists and SGC staff will evaluate applications on how community leadership is incorporated. Applicants are highly encouraged to provide stipends for resident participation in the CGS. Community participation stipends are eligible costs.

Applicants with Project Areas that cross multiple jurisdictions must explain in their Collaborative Governance Agreement Worksheet how the grant will be co-implemented by all relevant public agencies and Tribal governments who collectively have jurisdiction over the entire Project Area. During the grant term, they will be required to include these entities in the CGA or execute a separate MOU for multiple jurisdictions. SGC staff will maintain the ability to field requests for alternative means of demonstrating compliance with this requirement. If a relevant agency or Tribal government with jurisdictional authority is not included in the CGA Worksheet, applicants must submit Letters of Commitment from the missing entity at the time of application. See *Appendix B: Collaborative Governance Requirements* and *Appendix I: Memorandum of Understanding (MOU) for Multiple Jurisdictions* for additional details.

Collaborative Governance Agreement

The Collaborative Governance Agreement will be submitted with their application as a worksheet signed by the Lead Applicant and all Partners. **Tribal applicants** who do not have any Partners may submit the Collaborative Governance for Tribes Worksheet in place of the Collaborative Governance Agreement (CGA) Worksheet.

If awarded, SGC may request changes to the terms of the Collaborative Governance Agreement during the Post-Award Consultation Process. Awarded applicants must formalize and execute the Collaborative Governance Agreement within 90 days of grant execution. (See *Appendix B: Collaborative Governance Requirements*)

The Collaborative Governance Structure and Agreement will govern implementation of the entire CRC grant. Applicants may design the structure and agreement to align with their needs; however, the Collaborative Governance Agreement must, at a minimum, include the following:

- Identification of the Lead Grantee (Lead Applicant) and Partners
- Roles and responsibilities for the Lead Grantee (Lead Applicant), all Partners, residents, and any community-nominated members
- Dispute-resolution processes and governance procedures for adding, removing, or modifying members
- Legal and financial provisions, including liability, financial relationships between the Lead Grantee and Partners, reimbursement processes, and procurement procedures
- Transparent decision-making processes
- A non-discrimination clause
- Meeting procedures, including frequency, minimum number of meetings open to the public, methods for publishing agendas and notes, and accessibility measures
- A clear and transparent process for involving community representatives and community-based organizations in decision-making

If Tribes are included as Lead Applicants or Partners, Tribes' sovereign status should be respected and upheld through the development of the Collaborative Governance Agreement and Collaborative Governance Structure. The Collaborative Governance Agreement should additionally outline measures that will be taken to protect the confidentiality of Tribal data and Traditional Ecological Knowledge collected or shared as part of grant activities.

Project Areas that cross multiple jurisdictions

If the Project Area crosses multiple jurisdictions, and all relevant agencies are included as members of the CGA, the CGA may satisfy the MOU for multiple jurisdictions requirement. To satisfy this requirement, the CGA must at minimum define the following:

- The arrangement and commitment of a dedicated staff member from each public agency and/or Tribal government to provide support for the CRC project by aiding in the development and implementation of:
    - Capital projects
    - Planning activities

    - Policies for CRC emergency activation procedures
- Participation in collaborative governance
- Systems to coordinate successful execution of the CRC grant and CRC Emergency Plan for each entity
- Identification of the public agency or Tribal government responsible for leading coordination among entities and resolving challenges associated with multiple jurisdictions within the Project Area. This entity may be the Lead Applicant, a Co-Applicant, an independent project manager contracted by the Lead Applicant, or another appropriate arrangement.

For **Tribal applicants** where the Project Area crosses multiple jurisdictions and includes portions that are not under the control of federally recognized Tribes, the Lead Grantee, may need to execute an MOU with the relevant jurisdictions during the Pre-Development Phase. These jurisdictions do not need to be Partners on the grant; however, in cases where the jurisdictions are Partners, a CGA may satisfy these requirements.

See *Appendix B: Collaborative Governance Requirements* and *Appendix I: Memorandum of Understanding (MOU) for Multiple Jurisdictions:*) for more information.

Tribal Lead Applicant with Partners

If a California Native American Tribe or Tribally-owned nonprofit has Partners, they will need a Collaborative Governance Structure and Collaborative Governance Agreement that complies with all requirements previously described. The Collaborative Governance Structure for California Native American Tribes or Tribally-owned nonprofits should be designed to:

- Fit the unique circumstances and existing relationships of a community
- Meet the overall goals of Collaborative Governance and accountability to the relevant community
- Be appropriate for the specific dynamics within that community

Note: See above for Project Area requirements for Implementation Grants for Tribal applicants that cross multiple jurisdictions.

Tribal applicants may be eligible for modifications of one or more requirements of the Collaborative Governance Structure and/or Collaborative Governance Agreement. Eligible applicants will be able to submit modifications via the online application platform and must include justification and demonstrate alignment with the overall intent of the requirements. SGC will be considered on a case-by-case basis.

Tribal Lead Applicant without Partners

If a California Native American Tribe or Tribally-owned nonprofit serves as the Lead Applicant for an Implementation Grant and does not include Partners:

- The applicant does not need a formal Collaborative Governance Structure and Collaborative Governance Agreement.
- The applicant must complete the Collaborative Governance for Tribes Worksheet.

- The applicant may still need an MOU for multiple jurisdictions (see above).

Tribal applicants may use existing governance structures or create new ones. However, applicants must demonstrate that they meet the intent of Collaborative Governance, including:

- The Tribal community was informed and in support of the proposed CRC project.
- The Tribal community is informed of, and involved in, grant implementation.
- There is accountability to the Tribal community and transparency over grant activities.
- There is a forum for individuals to provide input into grant implementation and raise concerns throughout the grant term.
- There are clear roles and responsibilities for all entities and/or individuals involved in the grant (such as different Departments within a Tribe).
- There is a clear process for decision-making processes during the grant term.
- Decisions are informed by Tribal community input.

3.3 Eligible Planning and Project Areas

Applicants must identify a geographic focus area and develop their CRC using a place-based approach. This is called the Planning Area for Planning Grants and the Project Area for Implementation Grants. The CRC Program uses this place-based approach to invest in historically under-resourced communities and tailor support on a neighborhood scale.

To formally acknowledge the land and the Indigenous peoples of the land where the project is taking place, applicants should notify surrounding Tribes of their project. See *Section 2.6 Tribal notification* for requirements and procedures.

Planning Grants Ⓟ

Planning Area

All CRC Planning Grant applicants are required to define a Planning Area, inclusive of a proposed CRC Facility and the related planning activities, and the impacted community around the proposed CRC Site. At the Planning Grant stage, applicants may include multiple CRC Facility sites with the intention of selecting a suitable project site for a future CRC Facility. Applicants are encouraged to review the Project Area eligibility requirements for Implementation Grants and consider their ability to align the focus area for future funding opportunities.

Tribal projects located on restricted-fee lands must comply with the requirements of the jurisdiction on which the land is located.

Implementation Grants

Project Area

CRC applications must be community focused. All CRC Implementation Grant applicants are required to define a Project Area. The Project Area must encompass the physical location of the **CRC Facility** (the CRC Site), **Campus Amenities** connected to the CRC Facility, **Partner Sites** and any programs and services based out of the CRC Facility or Partner Sites.

Campus Amenities included as part of the CRC Facility must:

- Be on the same parcel or an adjoining parcel of the proposed CRC Facility **OR**
- Be within a one-mile radius of the CRC Facility and be along a route that is accessible to pedestrians and individuals using wheelchairs or other mobility devices or accessible by vehicle by the end of the grant term

Note: Transportation to and from the CRC may extend beyond the limits of the identified Project Area.

Partner Sites are sites managed by the Lead Grantee or Partners that offer programming and services that advance resilience within the community. Note that Partner Sites are not considered CRCs and are not responsible for the full suite of required functions or features. Additionally, Partner Sites included as part of an application:

- Do not need to be within one mile of the CRC Facility
- Must be accessible and offer eligible services, programs, and amenities year-round to community residents
- Are eligible for minor capital improvements (See *Section 6.3 Cost Categories and Caps*)

Applications that include Partner Sites must explain how the separate facilities will serve complementary needs for communities within their region, and why the full needs of the proposal cannot be met at the single main CRC Facility. Partner Sites are prohibited from using CRC grant funds to replace funds from other sources or to gain a financial advantage. The grantee must coordinate with their County Office of Emergency Services or the relevant departments responsible for emergency management and planning for the County to determine any relevant procedures for emergency activation at these sites.

Project Areas that Cross Multiple Jurisdictions

Applicants with Project Areas that cross multiple jurisdictions must explain in their Collaborative Governance Agreement Worksheet how the grant will be co-implemented by all relevant public agencies and Tribal governments who collectively have jurisdiction over the entire Project Area. If a relevant agency or Tribal government with jurisdictional authority is not included in the CGA Worksheet, applicants must submit Letters of Commitment from the missing entity at the time of application. (See *Appendix I: MOU for Multiple Jurisdictions*)

If awarded, the Lead Grantee must execute a Memorandum of Understanding (MOU) prior to the end of the Pre-Development Phase, and before starting construction, that outlines how all public agencies and Tribal governments who collectively have jurisdiction over the entire Project Area will effectuate and manage the grant. This requirement may be satisfied with the CGA. See *Section 7: Program Requirements* for a full list of Application Requirements, Pre-Development Requirements, and Implementation Grant requirements.

Tribal applicants

Tribal Projects located on restricted-fee lands must comply with the requirements of the jurisdiction on which the land is located. Tribal applicants will be able to submit modifications to the Project Area requirements via the online application platform.

3.4 Eligible Facility Types

CRC facilities must be publicly available year-round to serve the community during emergencies and during normal, non-emergency periods. (*See Appendix A: Terms and Definitions*)

Applicants to all CRC grants must demonstrate how the chosen facility will reduce the public health impacts of extreme heat or other emergency situations exacerbated by climate change, such as wildfires, power outages, dust storms, or flooding. CRC Facilities are expected to deliver year-round, publicly available services and programming including emergency response services during disruptions, such as a disaster, state of emergency, local emergency, and/or deenergization event.

Examples of existing community-serving facilities include, but are not limited to:

- Senior and youth centers
- Park and recreation sites
- Libraries
- Health clinics
- Hospitals
- Schools
- Town halls
- Food banks
- Homeless shelters
- Childcare facilities
- Community centers
- Community nonprofit facilities providing essential services
- Places of worship
- Fairgrounds

Additional possibilities depending on local context may include:

- Small business incubators
- Commercial kitchens

- Workforce development and training facilities
- Cultural centers

CRC Program funding may not fund religious worship, religious instruction, or proselytization.

Planning Grants P

For CRC Planning Grant applications, at least one proposed CRC Facility site (CRC Site) is required per application. Grantees will be required to demonstrate site control or an ability to gain site control for all proposed project sites within the grant term if funding is awarded. (*See Appendix F: Site Control*)

Implementation Grants I

Applications may include more than one site, provided that at least one site (CRC Site) fulfills all required CRC Facility functions and features. (See *Section 3.3 Eligible Planning* and *Section 5.4 Implementation Grant Requirements*)

The CRC Site must be the focus of the infrastructure investment and meet all site readiness requirements. The CRC grant may fund programming and services at Partner Sites. Partner Sites are also eligible for minor capital improvements. Capital spending at Partner Sites cannot make up more than 8% of the total award. See *Section 6.3 Cost Categories and Caps* for examples of eligible minor capital improvements. Applications that include Partner Sites must explain how the Partner Sites will serve complementary needs for their communities within their region.

Applications can include existing facilities or new construction projects. By the completion of the CRC Implementation Grant award term, all CRC Facilities (not Partner Sites) must meet the CRC Facility Requirements. (See *Section 5.4 Implementation Grant Requirements*)

Section 4: Planning Grants

Summary of Section 4

This section describes Planning Grant objectives, eligible activities, and timeline.

4.1 CRC Planning Grant Objectives Ⓟ

CRC Planning Grants will support planning activities to prepare communities to implement Community Resilience Centers. CRC Planning Grant activities should focus on preparing for a future CRC Implementation Grant or similar funding opportunity, and must demonstrate effective, robust community engagement and planning efforts.

Planning activities should engage key parties and ensure that all the necessary project components are in place for the future construction or retrofit of a CRC. They should also engage key parties in broader community resilience to climate emergencies and intersecting social and economic issues. In addition to advancing general program objectives (*See Section 1.3 Program objectives*)

Proposed planning activities will:

- Advance the community's ability to identify, envision, design, construct, resource, and activate sites as CRCs
- Increase the accessibility of future community resilience centers to community members, especially during and after emergencies
- Build, strengthen, and sustain community resilience, in connection with a proposed CRC
- Prepare for future implementation funding opportunities to construct or retrofit the CRC

4.2 Eligible Planning Grant Activities Ⓟ

Eligible Planning Grant activities include:

- Preparing applicants to apply for a CRC Implementation Grant or other similar funding opportunity, including but not limited to:
    - Partnership development
    - Identifying and engaging interested parties (power mapping)
    - Community needs and/or health needs assessments
- Identifying and preparing project sites for future development into Community Resilience Centers. Activities can include but are not limited to:
    - Feasibility studies and site identification
    - Identifying potential climate and other public health or socioeconomic impacts to selected sites
    - Energy planning, audits, and site assessments
    - Architectural and engineering designs
    - Site investigation, analysis, or planning such as soil borings

  - Site reconnaissance efforts that inform project feasibility or design, including geotechnical testing, environmental sampling, utility locating, archaeological or cultural resource surveys
  - Scoping of Campus Amenities and CRC-based community resilience programs and services
  - Permitting, including CEQA-related activities
  - Planning for project readiness
- Completing fiscal analyses and studies, such as:
  - Conducting a fiscal impact analysis to understand long-term service costs of future development and to determine fee structures
  - Determining approaches to demonstrate financial sustainability for ongoing operations, maintenance, and staffing
- Building and sustaining local capacity of Project Leads and Partners, including:
  - Investments in Partner and local staff development
  - Purchase or usage of project planning tools
  - Organizational capacity activities such as access to financial services or legal review
  - Participation and/or partnership with existing workforce programs
  - Provision or referral of technical assistance for Partners
- Evaluating, updating, and streamlining various policies and codes currently enforced by the Planning Department and other local departments (e.g., public works, health and safety, fire, parks and open space, etc.) to:
  - Support the development of a future CRC Facility
  - Integrate access and functional needs into emergency plans, as identified in AB 2645
- Preparing or updating local jurisdictional plans, such as:
  - Climate action plans
  - Climate adaptation plans
  - Local hazard mitigation plans
  - Community emergency response plans
  - County emergency operations plans
  - The Safety Element of General Plans (SB 379), as they relate to the integration of access and functional needs of potential CRCs, called out in AB 2645
- Designing and conducting community engagement and incorporating those community engagement results into newly developed or enhanced programs and services. See *Appendix C: Community Engagement and Eligible Costs* for further detail on key considerations and requirements. Community engagement activities should include the input and expertise of:
  - Local public agency staff
  - Community-based organizations
  - Workforce development boards
  - Overburdened individuals and groups
  - Tribal communities

    - Priority populations
- Developing and implementing programs and services that include:
    - Engaging the community around emergency planning
    - Increasing community and/or climate resilience
    - Enhancing local capacity (i.e., workforce development and training opportunities for a future net zero carbon economy, supporting local leadership and grassroots engagement in civic and community development, and climate resilience awareness and activities)

Note that the following activities are **not** eligible Planning Grant activities:

- Land acquisition
- Construction or renovation activities

4.3 Planning Grant Requirements Ⓟ

Within the CRC Planning Grant term, each CRC Project must complete and finalize the following.

- Final **Community Engagement Plan** due within the first six months of the grant term (See *Section 7.4 Community engagement*)
- **Collaborative Governance Structure** and **Collaborative Governance Agreement** due within the first year of the grant term (See *Section 7.5 Collaborative Governance*)
- Demonstrate the **ability to gain site control** at least 90 days prior to end of the grant term (See *Section 7.6 Site control and readiness*)

4.4 Planning Grant Timeline Ⓟ

All anticipated timelines are approximate and will be finalized by the Notice of Funding Availability (NOFA):

1. **Post-Award Consultation Process:** Approximately three to six months following award
2. **Grant Term:** Two years following Grant Agreement execution (with the option to extend on a case-by-case basis)

4.5 Planning Grant Phases Ⓟ

Planning Grants consist of the phases below. All timelines are approximate and will be finalized by the Notice of Funding Availability (NOFA).

Application Period (2-3 months)

Applicants to the CRC Program will complete and submit required documentation during the Application Period. (See *Section 7.1 Program Requirements Overview*) Only applications that meet all Application Requirements will be considered for award. SGC staff will recommend the Council make awards based on application scores and CRC funding goals. (See *Section 8.4 Funding Priorities and Priority Points*)

Post-Award Consultation (PAC) Process (3-6 months)

The Post-Award Consultation process is a three-to-six month process that begins following the award announcement by SGC. The awarded applicant will work with SGC staff to execute their Planning Grant Agreement and ensure their scope of work fulfills program requirements. Work completed during the PAC Process will include:

- Refining the work plan and budget submitted with the application and finalizing the CRC Project scope of work (timeline, budget, and deliverables), including a detailed work plan and budget for the Implementation Phase
- Completing attachments to comply with administrative, statutory, and program requirements
- Revising budget to eliminate any ineligible costs
- Incorporating SGC staff recommendations to scope of work
- Approving all CRC application components

Once all PAC requirements have been met, SGC and the Lead Grantee will execute the Planning Grant Agreement for the Implementation Phase.

Implementation Phase (2 years)

The Implementation Phase begins when the Planning Grant Agreement is executed. Lead Grantees can access funds as soon as the Grant Agreement is executed. Lead Grantees will be required to complete all implementation work based on their approved work plan and budget, along with all program requirements.

4.6 Developing a Planning Grant Application Ⓟ

Applicants should begin by identifying the partnerships and planning activities that they would like to include in their application. If an applicant is pursuing a Planning Grant with the intention of pursuing a CRC Implementation Grant in a future round, the applicant should familiarize themselves with the Implementation Grant requirements and propose Planning Grant activities that prepare them for a future Implementation Grant application. Please note that the Planning Grant can prepare applicants to apply for multiple sources of implementation funding, not just the CRC Program.

Please see *Section 7: Program Requirements* and *Section 8: Application and Scoring* for more information on Planning Grant requirements, application components, and Scoring Criteria.

For details on Application Technical Assistance availability, please see *Section 10: Technical Assistance*.

Section 5: Implementation Grants

Summary of Section 5

This section describes Implementation Grant objectives, eligible activities, Strategies, requirements, timeline, and phases, as well as application components.

5.1 CRC Implementation Grant Objectives

CRC Implementation Grants will fund new construction and upgrades of CRC Facilities and Campus Amenities that support use of the CRC Facility. Additionally, Implementation Grants fund programs and services that build social cohesion and community resilience. In addition to advancing general program objectives (See *Section 1.3 Program Objectives*)

CRC Implementation Grants have the following objectives:

- Create multi-benefit, community-serving spaces that are resilient to climate hazards and emergencies
- Deliver year-round essential programs and services to communities, including during disasters, emergencies, and disruption events
- Support community-driven partnerships and programming to increase climate resilience, expand economic opportunities, enhance social cohesion, and reduce health, environmental, and social inequities across California
- Build, strengthen, and sustain local leadership and grassroots engagement in civic and community development, and climate resilience awareness and activities

The CRC Program intends to balance both shorter-term emergency response needs with longer-term ongoing community needs and services. These lists provide real-world examples from public input:

Examples of emergency response needs

- Heating
- Cooling
- Food distribution
- Personal Protective Equipment (PPE) distribution, health screenings, infectious disease testing and vaccinations
- Backup power, electricity, water, and broadband
- Emergency preparedness presentations and trainings

Examples of ongoing community needs and services

- Workforce development, education, and training opportunities

- Small business incubation
- Community garden
- Community meetings and celebrations
- In-language (community language) programs and youth/senior services
- Service provision, such as healthcare services

5.2 Eligible Implementation Grant Activities Ⓘ

CRC Implementation Grants will provide funding for the implementation of capital projects and the development of programs and services offered at the CRC Facility and/or Partner Sites.

Capital Projects

CRC Facility

Activities related to direct construction, retrofits, and other upgrades to the CRC-related spaces in the CRC Facility itself, such as:

- Pre-construction
- Energy audits
- Direct construction
- Building rehabilitation

Development of basic infrastructure, including water, wastewater, broadband, and energy infrastructure connections that will serve the CRC Facility and/or Campus Amenities.

Campus Amenities

Activities related to the construction or improvements to amenities located at the CRC Facility. Amenities should strengthen the community's resilience to climate and other disasters, such as installing rain gardens or planting shade trees.

Partner Sites

Activities related to minor upgrades to the CRC-related spaces at Partner Sites. The Lead Grantee or Partner must demonstrate site control. Partner Site upgrades must be complimentary to the main CRC Facility and support the community's vision of resilience. Examples of minor upgrades include:

- Site improvements, such as painting or community gardens
- Installation of appliances that directly support programs and services, including HVAC or refrigeration
- Improved ADA accessibility

Programs and Services

Programs and services offered at the CRC Facility and/or Partner Sites must build community resilience and encourage year-round use of the CRC Facility, beyond emergency activations. Programs and services funded by the CRC grant must be available to the public. Note for Tribal Applicants: For CRCs on Tribal land, requirements for "public" should be interpreted to apply to that Tribal community and not to the public beyond that Tribal community. All CRC Implementation Lead Grantees are required to enhance or expand their community engagement and programming, in addition to any existing community engagement and programming efforts.

For additional examples, please see *Section 5.3 Implementation Grant Strategies* and *Appendix E: Examples of Eligible Implementation Grant Activities.*

5.3 Implementation Grant Strategies

To achieve the CRC Implementation Grant objectives, each CRC application must include **at least four of the Strategies** listed below. These Strategies are modeled from other SGC programs, integrated with robust public comment, and bridge both physical infrastructure and social infrastructure. This approach is intended to provide communities with maximum flexibility to meet local priorities and needs.

Example activities listed under each Strategy below are intended to illustrate the overall logic of the seven Strategies; demonstrate how each Strategy encompasses both physical infrastructure and social infrastructure activities; and model a comprehensive, holistic approach to both climate and community resilience. Once CRC Facilities are completed, each activity must be based at or out of the CRC Facility, CRC Campus, and/or at a nearby Partner Site.

Note: The examples below are non-exhaustive lists. *Additionally, activities under these Strategies may overlap. (*See *Appendix E: Examples of Eligible Implementation Grant Ativities)*

Strategy 1: Energy Resilience

Build or enhance the CRC's capacity to prepare for and withstand energy-related disruptions, improve overall energy efficiency, and provide energy access and resources to the community during emergency activations and year-round.

Examples of Capital Project Activities

- Solar photovoltaic (PV) installation and associated roof upgrade costs
- Islanded microgrids with renewable energy generation and storage
- Energy infrastructure
- Energy efficiency upgrades
- Building envelope strengthening, including window and sealant upgrades
- Battery storage
- Fuel-switching
- Appliance electrification and associated electrical upgrade costs

Examples of Programs and Services

- Flyer distribution on energy rebate programs
- Case management and enrollment of community members in weatherization and energy-assistance programs
- Information on programs like Medical Baseline, if applicable

Strategy 2: Water Resilience

Build or enhance the CRC's capacity to prepare for and withstand water-related disruptions, improve overall water efficiency, and provide water access to the community during emergency activations and year-round.

Examples of Capital Project Activities

- Water efficiency and appliance upgrades like low-flow toilets, urinals, dishwashers, aerosols, showers, and laundry facilities
- Water filtration
- Water purification
- Well water filtering
- Replacement of on-site vegetation with low-water uses and drought-resistant landscaping and irrigation system
- Low-impact development (LID) measures (e.g., bioretention facilities, rain gardens, rain barrels and rain catchment systems, and permeable pavements)

Examples of Programs and Services

- Culturally and linguistically appropriate education and materials around water purification
- Water conservation and drought-resistant activities
- Case management and enrollment support for rebate or financial support programs relating to low-water or low-impact development improvements

Strategy 3: Air Quality and Public Health

Build or enhance the CRC's capacity to provide clean air during emergency activations and year-round; equip communities with resources, information, and trainings on public health and extreme weather conditions, including extreme heat; and support social cohesion and community resilience.

Examples of Capital Project Activities

- Filtration upgrades to heating, ventilation, and cooling (HVAC) systems
- HVAC system replacement
- Air filtration and purification appliances
- Outdoor cooling solutions and heat-reflective measures
- Passive cooling retrofits and fans
- Equipment for disease and control prevention, and/or public health testing & screening resources

- Indoor and outdoor air monitors
- Medical facilities/resources (medical, behavioral, dental)

Examples of Programs and Services

- Culturally and linguistically appropriate education on heatstroke and other heat-related illnesses and/or hypothermia and other cold-related illnesses
- Programs tracking indoor and outdoor air quality, asthma, and public health impacts
- Community and cultural meetings focused on building local social cohesion and community trust
- Peer-support networks and services to increase social cohesion and connectedness (e.g., promotora programs, service navigator positions, ambassador programs)
- Mutual-support networks and services

Strategy 4: Nature-based Solutions and Food Security

Build or enhance the CRC's capacity to provide food during emergency activations and year-round; develop or strengthen nature-based solutions to mitigate climate impacts; and provide resources, information, and trainings for community members on nature-based solutions and healthy foods.

Examples of Capital Project Activities

- Urban forestry and community greening
- Vegetation management
- Permeable surfaces
- Conversion to climate-smart landscaping
- Land acquisition for defensible space and nature-based solutions, including outdoor recreation
- Community gardens and localized food production
- Commercial kitchen, food processing, refrigeration, storage, and distribution
- Livestock grazing in open space

Examples of Programs and Services

- Cooking and gardening classes
- Wildfire management trainings
- Climate-smart landscaping education
- Resources and trainings on maintenance of defensible space around homes
- Agricultural and healthy food educational opportunities for children and community members

Strategy 5: Emergency Preparedness and Critical Communications

Build or enhance the CRC's capacity to prepare for and withstand emergency activations; develop and strengthen local critical communications infrastructure and networks; and provide community with resources, information, and trainings for emergencies and critical communications.

Examples of Capital Project Activities

- Seismic retrofits to CRC Facility
- Installation of broadband and critical communications services and associated upgrades
- Group gathering space to broadcast, display, or share information

Examples of Programs and Services

- Community emergency response team (CERT) and first aid trainings
- Community-led emergency management, response, and recovery planning and functions
- Disaster and evacuation planning and education
- Food, water, PPE, and disaster preparedness kits distribution
- Portable communication options like radios and hotspots
- Development of local phone trees and other measures for emergencies
- Information on existing emergency alert systems and development of early notification emergency process for priority populations, especially those with disabilities
- Creation and distribution of in-language pamphlets and multimedia communications on extreme heat, climate, and other emergencies
- Disaster preparedness trainings, including wildfire evacuations and extreme heat events
- Heat-illness recognition and emergency response training for CRC Facility staff

Strategy 6: Mobility and Access

Build or enhance the CRC's capacity to serve community members, particularly priority populations, effectively during emergency activations and year-round; develop or strengthen accessible transportation options to the CRC Facility; and enhance mobility options for communities. Scope and service area of transit extensions, shuttles, and paratransit must be relevant to CRC Facility.

Examples of Capital Project Activities

- Public transit passes and/or service extension connected to CRC Facility
- Bus stop addition and/or Bus stop upgrades
- Mobile units and shuttles for Access and Functional Needs (AFN) communities, especially older adults, people with disabilities, and transit-dependent community members
- Purchase and maintenance of electric vehicle (EV) fleet that is wheelchair/motorized scooter accessible based at CRC Facility
- EV charging infrastructure
- Closing gaps in bike and pedestrian network within one mile of CRC Facility (bike lanes, sidewalks)
- EV car-share; accessible signage, such as for accessible parking and accessible routes
- Shuttles and/or paratransit connected to CRC Facility

Examples of Programs and Services

- Development of flexible transit services and programs, including paratransit and vanpools
- Micro-mobility programs (e.g., bike and electric bikeshare)
- Culturally and linguistically appropriate training on electric vehicle, car-share use, bicycle use and enrollment
- Safety education programs for active transportation
- Implementation of universal mobility wallets for all mobility options (transit, bike, car, or ride hailing)

Strategy 7: Workforce Development, Education, Training, and Economic Resilience

Build or enhance the CRC's capacity to provide local workforce development trainings; develop and provide workforce opportunities and support relevant to community members' strengths, priorities, and needs; and equip communities with increased access to leadership and advocacy, civic engagement, jobs and careers, and other economic opportunities. Advance economic resilience by supporting low-income households in reducing financial burden through the connections of supportive services.

Examples of Capital Project Activities

- Construction and renovation of classrooms and/or training areas for specific workforce training programs
- Purchase and maintenance of computer labs
- Conference rooms
- Child-care spaces
- Community activity rooms

Examples of Programs and Services

- Trainings on outdoor workers' rights and protections, especially during poor air quality and extreme heat events
- General Educational Development (GED) Test, solar installation, and other certification programs based at the CRC Facility
- Local training programs like community health worker certification programs, classes and networking for contractors and other workers
- CRC Facility equipment trainings, including broadband maintenance, to build local staffing capacity
- Workforce training for careers in urban forestry, urban agriculture, and ecological restoration and other green jobs
- Computer literacy classes
- Entrepreneurship and small business incubation programs
- Programs focused on cultivating strong, grassroots leaders
- Career fairs and recruitment opportunities

- Trainings for community members on financial literacy and planning

5.4 Implementation Grant Requirements

While the Strategies provide applicants with flexibility to best achieve community priorities, by the end of the CRC Implementation Grant term, each CRC Project must meet program requirements for the CRC Facility and plans, detailed below. Communities are strongly encouraged to include additional features and activities (capital projects and/or programs and services) listed above. (See *Section 5.3 Implementation Grant Strategies*)

CRC Facility Requirements

All CRC Projects must involve a physical building. The CRC Program cannot fund upgrades *only* to an outdoor space, although improvements to an outdoor space may be eligible on Partner Sites or on the CRC Campus.

Not less than 90 days prior to the end of the Implementation Phase, all CRC Facilities must meet the required functions and features below. While CRC Partner Sites are not considered CRCs and do not need to fulfill the required functions below, they should aim to provide the listed features as possible.

Projects led by **Tribal applicants** and/or Projects located in **rural** communities, as defined in *Appendix A: Terms and definitions*, for whom these requirements present a hardship may be eligible for modifications, with justification, for asterisked (*) functions or features below. In these cases, applicants must name the asterisked function or feature, provide context for the specific hardship, and propose a relevant and feasible modification. Eligible applicants will be able to submit modifications via the online application platform. SGC staff will review such modifications on a case-by-case basis.

For example, broadband connectivity in rural communities may depend on external factors beyond the scope or an applicant's control. A relevant and feasible modification to the broadband requirement could include high-speed internet access in the CRC Facility by end of grant term, in addition to purchase and/or maintenance of hotspots, satellite and ham radios, phone trees, and provision of computer access and digital literacy trainings and resources at the CRC Facility.

A. Required Functions of Community Resilience Centers

All CRCs must be:

- Open and accessible to the public and offer programs and services year-round to community members[7]
- Able to be activated seven days per week for heat waves and other climate emergencies that do not require overnight sheltering

[7] AB 211 (Committee on Budget and Fiscal Review, Chapter 574, Statutes 2022), available at: https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=202120220AB211

- Able to be activated for overnight-shelter 24/7 during larger-scale climate emergencies **OR** able to coordinate transportation of community members to an identified nearby evacuation shelter

All CRCs must provide the following functions:

- Space and supplies needed for people to sleep
- Pet-sheltering*
- Food distribution or space for food preparation and storage
- Showers and ADA-compliant showers*
- Refrigeration for medicines
- Laundry*
- Portable restrooms in the event of water disruptions*

These required functions can be met through:

- Inclusion of these functions on-site at the CRC Facility itself or
- Inclusion of these functions off-site, through pre-identified and planned local partnerships. These functions could be stationed at a site nearby or through portable means, brought in during an emergency. They may be funded through the CRC grant.

Generally, a single CRC Facility must meet all the required functions. However, in exceptional cases, some functions may be met through pre-identified, off-site partnerships. These will be approved on a case-by-case basis. All proposed CRC Project components will be subject to all applicable local, state and federal codes and regulations necessary to enable their use for the purposes listed above.

B. Required Features of Community Resilience Centers

By the end of the Implementation Phase, the CRC Facility must have capabilities and features that enable the site to be activated for a range of climate and other emergencies. Partner Sites should aim to have as many of these features as possible. These include:

- ADA-compliant facilities (See ADA Checklist for Emergency Shelters)
- Gender-neutral restrooms
- Heating, Ventilation, and Air Conditioning (HVAC) System
- Air filtration system (MERV 13 at minimum)
- Broadband access*
- Backup power generation and/or battery storage and/or islanded microgrid with storage*
- Device charging capabilities for cell phones, personal communications devices, medical devices, power wheelchairs, and other assistive devices and technology*
- Drinking water stored on-site with a plan for re-supply

C. Required Provision of Services and Use as Community Resilience Center

The CRC Facility must remain dedicated to serve as a Community Resilience Center for a minimum of 15 years. All awarded applicants will be required to produce either a recorded deed restriction or a Memorandum of Unrecorded Grant Agreement by the end of the second year of the grant term; note that the grant term begins with the start of the Pre-Development Phase. This will apply to both leased and owned facilities. (See *Section 8: Application and Scoring* for more information) This may not apply to Partner Sites where no capital improvements are made.

Lead Grantees must offer programs and services during the Implementation Phase and may offer programs and services through the Evaluation Phase.

CRC Required Plans and Processes

Lead Applicants and Partners must submit draft CRC Emergency Plans and Community Resilience Plans with their application. SGC will provide templates for draft plans with applications. Once awarded, Lead Grantee and Partners will continue to develop their plans. Finalized CRC Emergency Plans and Community Resilience Plans are due 90 days prior to the end of CRC Implementation Phase.

A. CRC Emergency Plans

Lead Applicants and Partners must provide draft CRC Emergency Plans that contain detailed processes and procedures that will take place to:

- Activate the CRC Facility in response to an emergency to provide weather respite and/or overnight-emergency shelter (if applicable)
- Evacuate the facility if there is an imminent emergency or hazard

These should align with relevant local emergency planning documents including the General Plan Safety Element, Local Hazard Mitigation Plan, and/or County Emergency Operations Plan, at minimum. The CRC Program recommends applicants consult with their local Office of Emergency Services and relevant permitting authorities to determine the CRC Facility's serving capacity.

Final CRC Emergency Plans will be due 90 days prior to the end of the Implementation Phase and must include all the following components:

- Emergency communications plan, with a focus on priority populations
- Energy resilience plan for backup power during emergencies
- Mobility plan to transport community members to and from the CRC Facility and alignment with or connection to pre-identified accessible evacuation routes
- How Lead Grantee and Partners will work with relevant emergency response organizations including, but not limited to: the jurisdiction's Office of Emergency Services, local hospitals or other healthcare providers, utility operators, and social service and volunteer agencies that provide direct service and relief
- Agreements and processes that ensure the CRC will be activated in the case of an emergency (including triggers for emergency situations), processes for activating the center during an emergency, and defined roles and responsibilities of the different organizations involved

- A procedure for receiving and swiftly resolving requests for reasonable modification or accommodation from people with disabilities, resolving any uncertainty in favor of accessibility

All plans must specifically consider how they will serve priority populations and other vulnerable community members. Plans should also consider any anticipated growth in population or density in the communities the CRC will serve, including population growth due to planned housing development.

Plans should detail any existing or planned shared use agreements for the CRC Facility by any organization, including disaster-related relief groups and any local, State, Federal, or Tribal agency in the case of a disaster.

CRCs must coordinate with their County Office of Emergency Services, or the relevant departments responsible for emergency management and planning for the County, to determine procedures for emergency activation. This coordination will be a required and ongoing component throughout the CRC Implementation Grant term. If the County in which the CRC is located is not a Lead Applicant or Partner, applicants must submit a copy of their communication expressing a Notice of Intent to Apply sent to the relevant County(s) Office of Emergency Services. (See *Section 8.3 Application Process*)

For CRCs where the County is not a Lead Grantee or Partner, the Lead Grantee may be required to submit signed Letters of Commitment with the final application package and will be required to submit a Memorandum of Understanding/Agreement (MOU/MOA) with relevant County entities by the end of the Implementation Phase. These Letters or MOU/MOAs will detail emergency activation procedures for the CRC or alternatively must identify the CRC as a shelter resource in a county/regionally developed Emergency Operations Planning (EOP) document. If a Lead Grantee is unable to provide a Letter of Commitment or MOU/MOA, SGC staff will maintain the ability to field requests for alternative means of demonstrating compliance with this requirement.

Note: *Tribal applicants with CRC projects located on Tribal trust land will not be required to coordinate with County Office of Emergency Services*. (See *Section 2: California Native American Tribes and Tribal Applicants)*

B. Community Resilience Plan

Lead Applicants and Partners must provide a draft Community Resilience Plan, outlining proposed Partners, Strategies, and programs and services at the time of application. The Plan must promote year-round use of CRC, not only during emergencies. Likely components of the Community Resilience Plan include programs and services, community events and trainings, and other related activities to ensure the CRC Facility functions as a community-serving location.

5.5 Implementation Grant Timeline I

All anticipated timelines are approximate and will be finalized by the Notice of Funding Availability:

1. **Post-Award Consultation Process**: Approximately three to six months following award

2. **Grant Term**: Approximately six years total
    - **Pre-Development Phase:** Approximately nine months from Grant Agreement execution
    - **Administrative transition from Pre-Development Phase to Implementation Phase:** Approximately three months
    - **Implementation Phase:** Approximately four years from the end of the Pre-Development Phase (five years from Grant Agreement execution)
    - **Evaluation Phase and Close Out:** One year following the end of the Implementation Phase

Figure 1 below summarizes this timeline.

Figure 1: CRC Implementation Grant Timeline

5.6 Implementation Grant Phases

The Implementation Grant process has been modified in Round 2 to include a funded Pre-Development Phase. The intent of the Pre-Development Phase is to:

- Reduce the burden of applying and engaging in the competitive award process
- Provide more funding and support for pre-development activities

Implementation Grants now consist of the phases below. All timelines are approximate and will be finalized by the Notice of Funding Availability (NOFA).

Application Period (4-5 months)

Applicants to the CRC Program will complete and submit required documentation during the Application Period. Only applications that meet all Application Requirements will be considered for award. SGC staff will recommend the Council make awards based on application scores and CRC funding goals. (*See Section 8.4 Funding priorities and Priority Points*)

Post-Award Consultation (PAC) Process (3-6 months)

The Post-Award Consultation Process is a three- to-six-month process that begins following the award announcement by the California Strategic Growth Council (SGC). Awarded applicants will work with SGC staff to execute their Grant Agreement and ensure their scope of work fulfills program requirements. Work completed during the PAC Process will include:

- Refining the scope of work, including timeline, budget, and deliverables, and developing a detailed work plan and budget for the Pre-Development Phase
- Completing attachments to comply with administrative, statutory, and program requirements
- Revising the application budget to eliminate any ineligible costs
- Incorporating SGC staff recommendations to scope of work
- Approving all CRC application components

In the Grant Agreement, the scope of work will be split into two phases:

- **Pre-Development Phase**: Lead Grantees can access Pre-Development Phase funds as soon as the Grant Agreement is executed.

- **Implementation Phase:** Lead Grantees cannot access Implementation Phase funds until they have successfully met all Pre-Development Requirements and amended the Grant Agreement, as necessary, to include a detailed work plan and budget for the Implementation Phase.

Pre-Development Phase (up to 1 year)

The Pre-Development Phase begins when the Grant Agreement is executed. Lead Grantees will be required to meet all Pre-Development Phase requirements before moving into the Implementation Phase**.**

During this phase, Lead Grantees may use grant funds to support:

- Staff time
- Pre-development work to achieve shovel-ready project plans
- Continued community engagement to refine project plans and prepare for the Implementation Phase

Work completed during the Pre-Development phase will include:

- Creating a detailed work plan and budget for the Implementation Phase
- Executing an Amended Grant Agreement to include detailed Implementation Phase work plan and budget

Lead Grantees should aim to complete the Pre-Development Phase requirements within nine months after executing the Grant Agreement. If a Lead Grantee has met all Pre-Development Requirements, they may conclude the Pre-Development Phase early. Any remaining Pre-Development Phase time and budget can be added to the Implementation Phase for the project.

Once all Pre-Development Requirements have been met, SGC will initiate an approximately three-month administrative transition to the Implementation Phase, if necessary. During this period, Lead Grantees and Partners may bill for staff time needed to finalize and execute the amended Grant Agreement.

Implementation Phase (4 years)

Lead Grantee will be required to complete all implementation work based on their approved work plan and budget, along with all required CRC program plans and program requirements.

Evaluation Phase (up to 1 year)

During the Evaluation Phase, the Lead Grantee will work with Partners and a Technical Assistance provider to evaluate and report on the project. Lead Grantees will be able to access funds for evaluation, reporting, and programming as needed.

5.7 Developing an Implementation Grant Application

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Implementation Grants contain the most robust requirements of the grant types.

- **Application Requirements**: Items required by the application due date
- **Pre-Development Requirements**: Items will be developed during the nine-month Pre-Development Phase but must be completed before Lead Grantees and Partners can move into the Implementation Phase and access implementation funds
- **Implementation Requirements**: Items required during the Implementation Phase; these make up the bulk of Implementation Grant program requirements
- **Evaluation Requirements**: Items required related to project evaluation; these requirements will involve regular reporting and data collection throughout the grant term, with final deliverables due 90 days prior to the end of the grant term

See *Section 7: Program Requirements* for more information.

Applicants considering an Implementation Grant should begin planning early and should expect to invest a significant amount of time in the application process.

Applicants should begin with a community planning and visioning process to identify the community's specific resilience needs and the CRC programs, and services that respond to those needs. As part of the visioning process, applicants should consider existing assets and resources in the community that could be amplified and integrated with future projects. **Strong applicants will have already completed this visioning, capital project identification, approximate budget estimates, and initial project scoping through a robust community engagement and planning process prior to the CRC Round 2 Application Period.** Applicants who have not yet completed this process should consider applying for a Planning Grant instead.

Applicants should also review the Implementation Grant threshold requirements (*see Section 8: Application and Scoring*). We strongly encourage collaboration with community members and community-based organizations to create innovative and impactful projects. The selection of the site, project, programs, and services should be determined by community priorities.

For details on Technical Assistance availability, please see *Section 10: Technical Assistance*.

Section 6: Program Costs

Summary of Section 6

- Eligible and ineligible costs vary by grant type.
- Eligible costs may include direct costs (such as costs for personnel, contractors, equipment, supplies, services, and travel expenses) and indirect costs.
- Implementation Grants have cost minimums and caps for certain categories.

6.1 Eligible Costs

Eligible Costs for All Grant Types

Eligible costs include direct and indirect costs that can be tied to eligible grant activities incurred during the grant period specified in the Grant Agreement. Eligible costs are reimbursed, and, in some cases, covered by advance payment. All eligible costs must be supported by appropriate documentation.

The "Eligible activities" sections for each grant type provides additional information about which activities would be covered as eligible costs by CRC grants. For CRC Planning Grant eligible costs, see *Section 4.2 Eligible Planning Grant Activities*. For CRC Implementation Grant eligible costs, see *Section 5.2 Eligible Implementation Grant Activities* and *Section 5.3 Implementation Grant Strategies*.

Direct Costs

Direct costs are costs directly tied to the implementation of the Grant Agreement. Direct costs incurred within the grant term and as specified in the Grant Agreement will be eligible for reimbursement. Direct costs are organized into three categories:

- Administration
- Project
- Program Delivery

Please see *Section 6.3 Cost Categories and Caps* for more information on these cost categories.

Across all cost categories, the following cost sub-types are generally eligible:

- Personnel costs for project management, grant implementation, and grant administration
- Contractor costs
- Costs for equipment, supplies, services, training, or travel expenses

Lead Grantees and Partners must adhere to the following additional requirements for direct costs:

- Travel reimbursements must adhere to State rates and certain conditions established on the CalHR website,[8] except for "incidentals" and out-of-state travel, which are not reimbursable under this grant.
- Contractor procurement processes must be aligned with program standards outlined in the Grant Management Manual and the Procurement Guide.

Lead Grantee and Partners must adhere to the following requirements for personnel costs reimbursement:

- Any fringe benefits, payroll taxes, and paid leave charged to the grant must be budgeted and charged as fully burdened hourly pay rates. Fully burdened rates should include employee benefits and salary adjustments within the grant term, as well as budgeting for professional development opportunities, if applicable.
- Grant funds may be used to support existing staff or to hire new staff within the grant term. Staff may be full-time or part-time employees.
- Grant funds may also be used to pay stipends to volunteers, interns, elders, or fellows

All eligible costs must be supported by appropriate documentation, including, but not limited to:

- Timesheets for in-house labor
- Invoices
- Receipts
- Other supporting documentation approved by SGC staff

CRC recognizes that public participation in community engagement activities is a benefit to the project and the public. See *Section 7.3 Applicant Capacity* and *Appendix C: Community Engagement Activities and Eligible Costs* for more details on eligible costs to increase access and accountability to disadvantaged communities.

SGC strongly recommends budgeting for the following costs for **all grant types:**

- **Personnel costs**: Using fully burdened hourly rates based on estimated annual costs for each employee, include an adequate budget to cover benefits, raises, promotions, and professional development opportunities within the grant term
- **Contingency**: For Implementation Grant applications, between 5% and 10% of the budget **should** be reserved for contingency. Planning applicants **may** include up to 10% contingency.
- **Training:** CRC aims to host two to four virtual or in-person peer-to-peer opportunities per year. Applicants should also factor in personnel time and travel costs associated with these opportunities. These would fall under grant Administration Costs.

Additionally, SGC strongly recommends including the following costs for **Implementation Grants:**

8 California Department of Human Resources. Travel Reimbursements. http://www.calhr.ca.gov/employees/pages/travel-reimbursements.aspx

- **Annual strategic planning day:** Many grantees have found it beneficial to have an annual strategic planning day for the Lead Grantee (Lead Applicant), all Partners, and other appropriate individuals and organizations (such as members of the Collaborative Governance Structure). This day can strengthen relationships, celebrate successes, identify areas for improvement in grant implementation, and plan for the upcoming year. SGC recommends budgeting for an external facilitator and other necessary costs, such as space rental. These costs should be included in the application budget.

Indirect Costs

Lead Grantees (Lead Applicants) and Partners may charge indirect costs at a rate of up to 15% of direct costs with two exceptions. Indirect costs may not be applied to Implementation Costs (see *Implementation Costs in Section 6.3 Cost Categories and Caps*) and they may not be applied to equipment purchases with a per unit cost of $5,000 or more. See *Tribal Applicants* below for an exception to this cap.

Indirect costs are costs of doing business that are of a general nature. These costs are not directly tied to the grant but are necessary for the general operation of the organization. Indirect costs include, but are not limited to:

- Personnel costs associated with administrative, supervisory, legal, and executive staff
- Personnel costs associated with support units, including clerical support, housekeeping, etc.
- Operating expenses and equipment costs not included as part of direct Project Costs (functions such as accounting, budgeting, audits, business services, information technology, janitorial, rent, utilities, supplies, etc.)

Documentation related to the determination of the indirect cost rate must be retained by the Lead Grantee and Partners for audit purposes.

Tribal applicants

California Native American Tribes and Tribally-owned nonprofits, as defined in *Appendix A: Terms and Definitions*, may use a higher indirect cost rate. SGC will accept a Tribal applicant's federally negotiated rate that is current at the time of application. If the Tribe does not have a federally negotiated rate, they will be able to submit a modification to receive a rate higher than 15% via the online application platform.

This modification is available to all California Native American Tribes and Tribally-owned nonprofits regardless of whether they are a Lead Applicant or Partner. It is not available to any other Lead Applicant or Partner involved in an application.

Reasonableness

All costs must be reasonable. A cost is reasonable if, in its nature and amount, it does not exceed that which a prudent person would incur under the circumstances when the decision was made to incur the cost. The following considerations can help determine if a cost is reasonable:

- If the costs are typical or necessary for running the organization or for fulfilling the Grant Agreement effectively
- The requirements set by factors such as sound business practices, arm's-length bargaining, laws at various levels (federal, state, local, Tribal), and terms and conditions of the Grant Agreement
- The market prices for similar goods or services for the geographic area
- If those involved acted wisely given their responsibilities to employees, the public at large, and the State
- Whether the costs significantly differ from the organization's practices and policies for incurring costs

Land Acquisition

Land acquisition is a type of direct cost. Land acquisition is an eligible Implementation Grant cost only if it is necessary to implement the CRC grant and will directly result in development of the CRC. Projects with land acquisition costs must demonstrate that development on the acquired land will be completed within the grant term and may be paid for with either grant funds or leverage dollars. Realtor commissions are not eligible costs.

SGC requires that land acquired with CRC funds be subject to a recorded deed restriction, Memorandum of Unrecorded Grant Agreement, or other mechanism to ensure long-term use of the facility in accordance with the CRC-funded work. Specific details of any land restrictions would be a part of the Grant Agreement and would be tailored by SGC and the Lead Grantee to achieve the objectives of the grant.

6.2 Ineligible Costs

Ineligible Costs for All Grant Types

The following costs are ineligible under the CRC Program *for all grant types*:

- Indirect costs in excess of 15% of direct costs excluding Implementation Costs (see *Implementation Costs* in *Section 6.3 Cost Categories and Caps*) and equipment purchases with a per unit cost of $5,000 or more, with the exception of Federally Recognized Native American Tribes, who may use the indirect cost rate negotiated with the federal government
- Expenses and activities incurred before the grant term begins or after it ends
- The following costs associated with community engagement and outreach:
    - Alcoholic refreshments
    - Food and refreshments which are not for public-facing community engagement events. Public-facing community engagement events are events that are open to members of the public, advertised to the community, and require some form of public participation.
    - Participant incentives, such as door prizes, direct cash benefits, or subsidies, which are unrelated to specific community work products. Please note that

stipends or compensation for community ambassadors (promotoras, etc.) do not apply to this category and are considered eligible costs.
    - General meetings that do not specifically discuss or advance implementation of the CRC Project
    - Costs associated with community or publicity events which are unrelated to specific project work products as outlined in the work plan in the CRC Grant Agreement
- Lobbying, including direct lobbying for the passage of specific bills or local propositions
- Commission fees
- Ongoing operational, maintenance, or staffing costs beyond the grant term
- Mitigation activities that are already mandated by local or state governing bodies or agencies
- Expenses for publicity not related to the awarded CRC project implementation
- Bonus payments of any kind
- Damage judgments arising from the acquisition, construction, or equipping of a facility, whether determined by judicial process, arbitration, negotiation, or otherwise
- Services, materials, or equipment obtained under any other State program
- Real estate brokerage fees and/or expenses or commission-based compensation related to the acquisition or disposition of real property. Please note that other expenses such as appraisals, escrow fees, surveying, recording fees, and legal fees associated with acquisitions are eligible.
- Stewardship of legal defense funds
- Fees associated with persistent late payment of services
- Costs that would supplant other committed funds (leverage funds) for any element of the proposed Project, including capital projects, programs, and services
- Acquisition and/or maintenance of fossil-fuel powered appliances, building systems, and infrastructure, such as diesel generators and gas-powered appliances

Ineligible Characteristics Applicable to All Projects

The following project characteristics will result in ineligibility:

- Projects that cannot demonstrate site control during the grant term (Implementation Grant Only)
- Projects that will acquire property through eminent domain
- Projects that are in active litigation
- Projects without long-term operations and maintenance plans (Implementation Grant Only)
- Projects without logical termini or independent utility
- Projects that are acquisition only

Ineligible Costs for Planning Grants P

For Planning Grants, CRC grant funds must not be used for costs associated with construction, renovation, or land acquisition. (See *Appendix A: Terms and Definitions*)

Ineligible Costs for Implementation Grants I

For Implementation Grants, CRC grant funds must not exceed the cost caps for Project Costs (Pre-Development and Implementation) spending at Partner Sites. (See *Section 6.3 Cost Categories and Caps*)

6.3 Cost Categories and Caps

Cost Categories and Caps for All Grant Types

Direct costs are organized into three cost categories: Administration, Project, and Program Delivery as defined below.

Administration

Administration Costs are costs associated with the planning and management of the grant, as well as costs associated with reporting and capacity building to ensure compliance with the Grant Agreement. The Lead Applicant and Partners must ensure sufficient resources are allocated to grant administration, which includes:

- Grant invoicing and reporting
- Regular meetings with SGC staff (approximately once a month for Implementation Grantees and Planning Grantees)
- Engaging with the Evaluator by gathering and reporting data, participating in focus groups, surveys, and interviews (Implementation Grant Only)
- Training and peer-to-peer learning opportunities hosted by CRC (virtually and in-person) approximately two to four times per year
- Reconciling the grant funding

Within their Administration budget, CRC Implementation Grant Applicants must set aside a minimum of 3% of their total award to cover costs associated with the Evaluation, which includes program data collection and evaluation. Lead applicants should decide how much of the award to set aside for Evaluation depending on their existing capacity to participate in evaluation activities, including coordinating with Partners and/or evaluators to collect and report data. (*See Section 9: Grant Administration*)

Project

Project Costs are costs that are directly related to the planning and development of the physical CRC Project (CRC Facility, Campus Amenities, and Partner Sites). They include Pre-Development

Costs and Implementation Costs. For Implementation Grants, a **minimum** of 51% of the grant award must be spent on Project Costs. This is inclusive of both Pre-Development and Implementation Costs.

Pre-Development Costs

Pre-Development Costs are costs to prepare and plan for the future construction of a CRC. There is no cap for pre-development costs for Planning Grant applications. For Implementation Grants, these costs may account for up to 20% of direct costs and must be spent during the Pre-Development Phase. Indirect costs may be applied to Pre-Development costs. Pre-Development costs include but are not limited to the items below:

- Community engagement costs to prepare projects for future implementation
- Soft costs for activities such as construction plans
- Specifications and estimates, including but not limited to planning, engineering, architectural, and other design work
- Environmental impact reports and assessments
- Facility Condition Assessments
- Appraisals, legal expenses, and easements

Implementation Costs I

Implementation Costs are costs of capital projects, which include site preparation, basic infrastructure, retrofits, and construction costs for the CRC Facility and Campus Amenities. Partner Sites are subject to a different cost cap (see below). In addition to construction costs, Implementation costs also include basic infrastructure costs. Basic infrastructure costs include water, wastewater, broadband, and energy infrastructure connections that will serve the CRC Facility and/or Campus Amenities. (See *Section 5.3 Implementation Grant Strategies* and *Appendix E: Examples of Eligible Implementation Grant Activities*)

Implementation Costs such as site preparation, basic infrastructure, retrofits, and construction costs are not eligible Planning Grant costs.

Indirect costs may not be applied to Implementation Costs (capital costs).

Partner Sites

Total Project Costs (capital spending) at Partner Sites cannot exceed more than 8% of the total grant award. Examples of minor upgrades include:

- Site improvements, such as painting or community gardens
- Installation of appliances that directly support programs and services, including HVAC or refrigeration
- Improved ADA accessibility

Program Delivery

Program Delivery Costs involve costs associated with planning for and implementing the CRC Program and program requirements.

For Planning Grants, this includes costs associated with meeting the Planning Grant requirements such as the Collaborative Governance Structure and costs associated with meeting the Implementation Grant Application Requirements for a future CRC. See *Section 4.3 Planning Grant Requirements* and *5.4 Implementation Grant Requirements*.

For Implementation Grants, this includes planning and implementing the program requirements and Implementation Grant requirements including requirements for programs and services; the Collaborative Governance Structure; and the required CRC Emergency Plan and Community Resilience Plan. See *5.4 Implementation Grant Requirements.* This cost category does not include architectural plans or engineering plans related to the construction or retrofit of the CRC Facility, Campus Amenities, or Partner Sites. Program Delivery Costs may include:

- Planning activities: Data gathering, assessments, curriculum development, plan preparation
- Project management: Time spent by staff developing the Community Engagement Plan
- Procurement: Staff time spent developing and reviewing procurement documents and proposals

Planning Grants Ⓟ

Table 1, below, contains a summary of eligible cost categories and their associated requirements. All categories may include personnel, contractor, supplies, travel, and other direct costs. Some cost categories may include equipment costs. Community engagement costs are eligible costs across all three cost categories. See *Appendix C: Community Engagement Activities and Eligible Costs* for details on community engagement and outreach costs.

Note that applicants must ensure that costs proposed in the program budget are eligible for funding. Costs deemed ineligible in the application review process will be removed and the Project's recommended total award will be adjusted accordingly.

Table 1: Planning Grant Eligible Cost Type/Category

Cost Type - Category	Description	Funding Requirement
Direct costs - Administration	Costs associated with the planning and management of the grant, as well as costs associated with reporting and capacity building to ensure compliance with the Grant Agreement.	n/a
Direct costs - Projects	Costs to prepare and plan for future construction (development) of a CRC. Includes Pre-Development costs but exclude costs associated with construction, renovation, or land acquisition A maximum of 10% of the total award can be budgeted for contingency costs	n/a
Direct costs - Program Delivery	Costs associated with meeting the Planning Grant requirements and costs associated with meeting Implementation Grant Application Requirements for a future CRC	n/a
Indirect costs	Costs that are not directly tied to the grant but that are necessary for the general operation of the organization	A maximum of 15% of direct costs excluding Implementation Costs and equipment purchases with a per unit cost of $5,000 or more (except for Federally recognized Tribes)

Implementation Grants

Table 2, below, provides a summary of eligible cost categories and their associated requirements. All categories may include personnel, contractor, supplies, travel, and other direct costs. Some cost categories may include equipment costs. Community engagement costs are eligible across all three cost categories. See *Appendix C: Community Engagement Activities and Eligible Costs* for details on community engagement and outreach costs.

Note that applicants must ensure that costs proposed in the program budget are eligible for funding. Costs deemed ineligible in the application review process will be removed and the Project's recommended total award will be adjusted accordingly.

Table 2: Implementation Grant Eligible Cost Type/Category

Cost Type - Category	Description	Funding Requirement
Direct costs - Administration	Costs associated with the planning and management of the grant, as well as costs associated with capacity building, reporting, and evaluation	A minimum of 3% of the total award budgeted for evaluation
Direct costs - Project	Costs related to implementation of CRC Facility and Campus Amenities. Includes Pre-Development and Implementation Costs. Between 5% and 10% of total award should be reserved for contingency.	At least 51% total award. Up to 20% of direct costs can be used for Pre-Development; up to 8% of the grant award can be used for upgrades at Partner Sites
Direct costs - Program Delivery	Costs associated with planning for and implementing the program requirements and Implementation Grant requirements including programs and services; Collaborative Governance Structure; and required CRC Emergency Plan and Community Resilience Plan.	n/a
Indirect costs	Costs that are not directly tied to the grant but that are necessary for the general operation of the organization	A maximum of 15% of direct costs excluding Implementation Costs and equipment purchases with a per unit cost of $5,000 or more (except for Federally recognized Tribes)

Section 7: Program Requirements

Summary of Section 7

This Section includes requirements of the CRC Program, organized by each grant type and grant phase. Each grant type has distinct program requirements due at application and during distinct phases of the grant term. Implementation Grant projects have additional requirements due at the end of the Pre-Development Phase, prior to moving on to the Implementation Phase. (See Section 5.6 Implementation Grant Phases and Section 4.5 Planning Grant Phases)

In this Section, program requirements are generally broken out into two primary categories:

- **Application Requirements**: These requirements are to be completed and submitted within a final application package.
- **Grant Term Requirements:** These requirements are to be completed during the grant term as specified by SGC, if/when a project is awarded. All requirements should be met and required deliverables and documentation submitted not less than 90 days prior to grant closeout.

Implementation Grants

During the grant term, Implementation Grants are divided into phases; they have distinct requirements at each phase. This section specifies whether a requirement is due during the Pre-Development or Implementation Phase.

- **Pre-Development Requirements:** These requirements are to be completed and submitted during the Pre-Development Phase (approximately first nine months of the grant term). These requirements must be completed before Lead Grantee can move on to the Implementation Phase (i.e., construction).
- **Implementation Requirements:** These requirements must be completed by the end of the Implementation Phase, before Lead Grantee can move on to the Evaluation Phase and project closeout.
- **Evaluation Requirements:** These requirements, related to project evaluation, will involve regular reporting and data collection throughout the grant term, with final deliverables due no later than 90 days prior to the end of the grant term.

7.1 Program Requirements Overview

Appendix D: Program Requirements Overview provides a condensed overview of program requirements for each grant type. Please see *Section 7.2 Applicant Eligibility* through *Section 7.9 CRC Emergency Plan and Community Resilience Plan* for additional details on requirements applicable to each grant type.

Planning Grants Ⓟ

For additional information about application and grant-term requirements for Planning Grants, please see:

- *Section 4.3 Planning Grant Requirements* and
- *Appendix D: Program Requirements Overview*

Implementation Grants Ⓘ

For additional information about application, pre-development, and grant-term requirements for Implementation Grants, please see:

- *Section 5.4 Implementation Grant Requirements* and
- *Appendix D: Program Requirements Overview*

Implementation Grant Applicants and awarded Lead Grantees must complete program requirements in accordance with *Section 5.6 Implementation Grant Phases*

- Applicants should aim to meet the Pre-Development Phase Requirements listed in *Section 5.4 Implementation Grant Requirements* by no less than 90 days prior to the end of the Pre-Development Phase.
- Awarded Lead Grantees must meet the Implementation Grant Requirements listed in *Section 5.4 Implementation Grant Requirements* no less than 90 days prior to the end of the grant term.
- Awarded Lead Grantees must meet the Evaluation Requirements listed in *Section 9.7 Implementation Grant Evaluation* no less than 90 days prior to the end of the grant term.

7.2 Applicant Eligibility

As described in *Section 3: Eligibility*, applications must include an eligible Lead Applicant, eligible Partners, an eligible Planning or Project Area, and eligible facility types. Applicants who do not meet eligibility criteria will not be evaluated for award. Changes to a Lead Applicant and/or Planning or Project Area eligibility during any phase of the grant term may result in award termination, revision or the award returning to the Council for reconsideration.

All Grant Types

Resolution

Application Requirement: If the Lead Applicant is a public agency, they must provide evidence of a passed formal resolution or documentation showing a delegated authority to bind the agency in the CRC application that includes authorization to apply for and accept a CRC Planning or Implementation Grant, and delegated authority to execute all related documents if awarded.

Tribal applicants serving as Lead Applicants are required to provide a Letter of Authorization or Resolution approved by Tribal Council that authorizes the Tribe or Tribally-owned nonprofit to apply for and receive program funds and execute all documents and activities related to the grant, if awarded.

Priority Points Documentation

Application Requirement: Lead Applicant must provide the **required documentation** to qualify for Priority Points. See *Section 8: Application and Scoring* for additional details on Priority Points and eligibility.

Planning or Project Area

Application Requirement: Lead Applicant must provide Planning or Project Area **address** (if available) and **coordinates** of the proposed CRC Site (location of the CRC Facility). Implementation Grants should also include the address (if available) and coordinates of any sites with Campus Amenities, as well as the address and coordinates of Partner Sites (if relevant). SGC may request a map of the Planning or Project Area. See *Section 3.3 Eligible Planning and Project Areas*.

7.3 Applicant Capacity

Applicants must demonstrate their management and financial capacity to oversee, manage, and implement their proposed CRC grant activities.

Planning Grants Ⓟ

Application Requirement: In addition to submitting an **Application Workbook** that includes a work plan and budget, Lead Applicants must answer narrative questions related to management and financial capacity.

Lead Applicants and Partner(s) must also submit **Letters of Commitment**, as specified in the grant application, describing their roles, responsibilities, and commitment to supporting the completion of the CRC Planning Grant Project on time and within budget, if awarded.

Implementation Grants Ⓘ

Letters of Commitment

Application Requirement: Applicants must provide relevant letters of commitment. CRC will provide application instructions and templates for each type of Letter of Commitment, including:

- Letters of Commitment to demonstrate management capacity.
- Letters of Commitment for multi-jurisdictional Project Areas from relevant public agencies (if these entities are not included as Partners in the CGA worksheet). See *Section 3.3*

Eligible Planning and Project Areas and *Appendix I: Memorandum of Understanding (MOU) for Multiple Jurisdictions*.

- Letters of Commitment to demonstrate site control. See *Section 7.6: Site Control and Readiness*.
- Letters of Commitment for emergency activation coordination (see *Section 5.4 Implementation Grant Requirements* and *Section 7.9 CRC Emergency Plan and Community Resilience Plan* .

Where possible, applicants may submit one Letter of Commitment which serves to demonstrate one or more of the following requirements, as applicable: management capacity, commitment from relevant public agencies, site control, and emergency activation coordination.

Management Capacity

It is essential that Lead Applicants and Partners have the ability to oversee, manage, and implement complex infrastructure projects. The Lead Applicant and Partners must also collectively possess the capacity to implement the proposed project, including meeting program requirements related to partner coordination, community engagement, year-round programming, evaluation, and reporting. Some of the requirements for management capacity may be demonstrated through Letters of Commitment.

Application Requirement: Lead Applicants must:

- Submit a detailed **work plan and budget** (Application Workbook) using the template provided with the application that identifies the Lead Applicant or Partner(s) responsible for leading each grant activity (i.e., capital project activities, engagement activities, and programs or services, etc.).
- Provide **contact information** for one reference who can speak to the quality and timeliness of work completed by the Lead Applicant. Letters of reference may be requested by SGC at a later time.
- Submit an **internal organizational chart** that describes the internal organizational structure with current and/or proposed full and part-time staff that will be dedicated to the grant.

Lead Applicant and Partners that are ***leading capital project components*** must:

- Submit **documentation** and a **narrative explanation** of having successfully completed similar work in California within the last 5 years for the grant component they are proposing to lead. This could be in the form of Annual Reports, project close-out reports, or other similar documents.
- Provide **Letters of Commitment**, as specified in the grant application, describing their roles, responsibilities, and commitment to supporting the completion of the proposed CRC Implementation Grant Project on time and within budget, if awarded.
- If the proposed Project Area ***crosses municipal boundaries***, federally recognized Tribal territory boundaries, or similarly relevant jurisdictional boundaries, applicants must provide **Letters of Commitment** from each relevant public agency. (*See Section 3.3*

Eligible Planning and Project Areas). Letters of Commitment may be satisfied by other mechanisms. (See *Appendix I: Memorandum of Understanding (MOU) for Multiple Jurisdictions*).

Pre-Development Requirement: Lead Grantees and Partner(s) must maintain the ability to oversee and implement the CRC Project and comply with all program requirements throughout the term of the grant. The work plans and budgets must have more clearly defined commitments, including finalized full or part-time staff hours and budget, and staff to be hired. The work plans and budgets must have clear public agency responsibilities.

Lead Grantees with Project Areas crossing multiple jurisdictions may need to execute a **Memorandum of Understanding (MOU)** prior to the end of the Pre-Development Phase that outlines how all public agencies and Tribal governments who collectively have jurisdiction over the entire Project Area will effectuate and manage the grant. See *Section 3.3 Eligible Planning and Project Areas* and *Appendix I: Memorandum of Understanding (MOU) for multiple jurisdictions.*

Financial Capacity

Application Requirement: The Lead Applicant must answer narrative questions and submit the following documentation and any additional documentation that may be specified in the application:

- **Financial statements and/or audits:** Provide copies of certified financial statements and/or audits for the organization for the past three fiscal years, prepared by an independent auditor or certified public accountant.
- **Organizational budget:** Provide the current fiscal year's annual organizational budget, including any other funding sources or revenue streams that exist for the organization.
- **Nonprofit documentation:** If the Lead Applicant is a nonprofit organization, please provide copies of the most recent Federal Form 990 (Form 990, 990-WZ, 990-N, or 990-PF as appropriate) and a copy of the organization's IRS 501 (c)(3) Tax Determination Letter (if relevant).
- **Audit findings:** Any applicant that has had an audit finding in the last five years is required to submit Independent Auditor's Report detailing the finding(s), and the organization's written response to the Auditor's report including the plan to resolve the audit finding(s).

Note: Partners are not required to submit the documentation above.

Implementation Requirement: Lead Grantees must maintain the financial capacity to adhere to the reimbursement processes of the CRC Program and comply with all program requirements throughout the term of the grant.

Tribal Applicants

California Native American Tribes or Tribally-owned nonprofits are exempt from submitting any financial or management capacity information that violates their data sovereignty. A Tribe that chooses not to submit the financial or management documentation described in this section must adequately demonstrate, through other documentation, that they have sufficient management and financial capacity to fulfill their proposed role in the CRC grant. Technical Assistance providers will support Tribal applicants in identifying and submitting alternative forms of documentation. SGC will determine whether the submitted documentation sufficiently meets this requirement.

7.4 Community Engagement

To ensure that grant funds provide direct, meaningful benefits to under-resourced communities, the CRC Program requires that Lead Applicants and, if awarded, Lead Grantees work with community members and priority populations through direct engagement. Lead Applicants must involve residents, organizations, and key Partners from the Project or Planning Area in all phases of the CRC project, from application to project development and implementation. CRC project proposals should be designed to meet residents' needs. These needs should be identified through a documented outreach and engagement process. Lead Applicants must tailor community engagement to their community through partnerships with local community-based organizations (CBOs). For CRCs on Tribal land, requirements for "public" should be interpreted to apply to that Tribal community.

Lead Applicants must also use proven methods of engagement to reduce barriers to participation and facilitate active participation of community residents. They should:

- Ensure that meeting discussions and materials are translated in culturally appropriate and responsive ways that support inclusive community engagement
- Schedule meetings at times that are convenient for community members
- Engage community members in information gathering, as well as outreach

(See *Appendix C: Community Engagement Activities and Eligible Costs*)

All Grant Types

Application Requirement: Lead Applicants must respond to **narrative questions** describing the community engagement to date, how community residents and local CBOs informed project applications, and all proposed engagement activities throughout the grant term. This includes a detailed description of community engagement that occurred within the Planning or Project Area. Implementation Grant applicants will provide some of this information within a **Prior Community Engagement (PCE) Worksheet**.

Applicants should notify surrounding Tribes of their project, and if desired by all parties, engage in consent-based collaboration that is flexible, equitable, culturally appropriate, and respectful during the application development and throughout the grant term. (See *Section 2.6 Tribal Notification*)

Applicants will also complete a draft **Community Engagement Plan** using a template provided by SGC. This will include proposed community engagement activities, if awarded.

Planning Grants Ⓟ

Grant Term Requirement: Lead Grantees must develop and finalize a **Community Engagement Plan** that meets the CRC Program's requirements during the first six months of the grant term. See *Appendix C: Community Engagement Activities and Eligible Costs* for a list of program requirements. The Community Engagement Plan should consider how residents and local leaders will be engaged throughout all phases of the project and be kept informed about project updates.

Implementation Grants Ⓘ

Pre-Development Requirements: Lead Grantees must develop and finalize a **Community Engagement Plan** that meets the CRC Program's requirements, by the end of the Pre-Development Phase. See *Appendix C: Community Engagement Activities and Eligible Costs* for a list of program requirements. The Community Engagement Plan should consider how residents and local leaders will be engaged throughout all phases of the project.

7.5 Collaborative Governance

Refer to *Section 3.2 Collaborative Governance Structure* and *Appendix B: Collaborative Governance Requirements* for full details of what is required in the Collaborative Governance Structure (CGS) and Collaborative Governance Agreement. *Section 3.2 Collaborative Governance Structure* also contains information applicable to Tribal applicants.

Planning Grants Ⓟ

Application Requirement: Applicants should propose initial Partners and vision for their CGS in the Planning Grant application, including preliminary processes the Partners will use to collaborate and make decisions throughout the grant term.

Grant Term Requirement: By the end of the first year of the grant term, Lead Grantees and all Partners must co-develop a CGS, resulting in a fully executed **Collaborative Governance Agreement (CGA).** The CGA must describe the governance, organization, and financial relationships of the CGS. (See *Section 9: Grant Administration* and *Appendix B: Collaborative Governance Requirements)*

Implementation Grants Ⓘ

Refer to *Appendix B: Collaborative Governance Requirements* for detailed requirements of the Collaborative Governance Structure (CGS) and Collaborative Governance Agreement (CGA).

Application Requirement: Applicants must submit a **CGA Worksheet** that addresses all requirements of the CGA. The CGA Worksheet will create the foundation for the CGA and must be co-developed by the Lead Applicant and all Partners. It must describe the governance, organization, and financial relationships of the CGS. (See *Section 9: Grant Administration*)

The Lead Applicant and all Partners must sign the CGA Worksheet. The signatories for each organization should be individuals who will have the authority to sign for their organization, such as an Executive Director or City Manager.

Within the CGA Worksheet, applicants must identify whether the Project Area crosses multiple jurisdictions, federally recognized Tribal territory boundaries, or similarly relevant jurisdictional boundaries. If the proposed Project Area does cross jurisdictional boundaries, the Lead Applicant is required to execute a multi-jurisdictional memorandum of understanding (MOU) if awarded, or include relevant agencies with jurisdictional authority in the CGA. SGC staff will maintain the ability to field requests for alternative means of demonstrating compliance with this requirement. If all relevant agencies with jurisdictional authority are included in the CGA worksheet, the worksheet must describe how these public agencies and any Tribal governments will coordinate and implement the grant collectively (See Section *3.2 Collaborative Governance Structure* and *Appendix B: Collaborative Governance Requirements* for additional requirements). If a relevant agency is missing from the CGA worksheet, applicants must include Letters of Commitment from each relevant public agency.

Pre-Development Requirement: During the Post-Award Consultation Process and Pre-Development Phase, Lead Grantees will work with their Partners to turn the CGA Worksheet into a **final CGA**. Grantees must fully execute their CGA by the third month of the Pre-Development Phase. SGC must approve the final CGA before it is executed. Any major decisions made before the execution of the final CGA will be governed by the terms of the CGA Worksheet submitted at the time of application.

7.6 Site Control and Readiness

Site control and readiness are critical requirements for the CRC Program, ensuring that projects can advance efficiently from proposals to implementation. Site control refers to having legal control of the project property, including the ability to develop and occupy the property in accordance with program requirements. Site control also ensures that the site is available for long-term community benefit. Applicants and grantees can demonstrate site control through the methods outlined in *Appendix F: Site Control*.

Site readiness reflects the Project's preparedness to move forward with proposed implementation. Demonstrating site readiness requires the project site and land use analysis, the facility floor plan, and the Facility Condition Assessment. Together, site control and readiness requirements demonstrate that the project site is available and ready for both social and physical infrastructure implementation for the future CRC.

Planning Grants Ⓟ

Site requirements for Planning Grants ensure the feasibility of the planning project and the future feasibility of proposed infrastructure components. SGC may request additional documentation to assess feasibility.

Site Control

Application Requirement: During the Application Period, Lead Applicants must provide a *detailed plan* describing how the Lead Applicant or proposed Partners plan to demonstrate the *ability* to gain site control no later than 90 days prior to the end of the grant term if awarded.

Grant Term Requirement: Lead Grantees or Partners must demonstrate the *ability* to gain site control no later than 90 days prior to the end of the grant term.

Lead Grantees and/or Partners may demonstrate the *ability* to gain site control with one of the following options:

- A signed option to lease or purchase or control the property, contingent upon receiving implementation funds through the CRC Program or leverage funding. The signed option must be equivalent to an MOU or signed agreement, including an acknowledgement between the Lead Grantee (or a Partner) and the property owner for the Lead Grantee/Partner's access, occupancy, and development of the property in accordance with program requirements for the 15-year term.
- A site control plan that details proposed sites and will be used during implementation
- Any of the methods outlined in *Appendix F: Site Control*

If a Partner demonstrates the *ability* to gain site control on behalf of the Lead Grantee, the Lead Grantee and the Partner will need to enter a separate, legally binding agreement, conditional on the award of implementation funding. It must include language allowing the Lead Grantees to access, occupy, and develop the property in accordance with program requirements for the 15-year term.

If Lead Grantees or Partners fully gain site control through any method found in *Appendix F: Site Control*, all lease, purchase, and occupancy agreements must include terms for the Grantee's access, occupancy, and development of the property in accordance with program requirements for the 15-year term.

Implementation Grants I

Site requirements must be complete by the end of the Pre-Development Phase, unless otherwise specified in the list below. All sites that include capital improvements must demonstrate site control. Partner Sites with proposed capital improvements must meet some of the site readiness requirements (see below). Projects will be carefully vetted during the application review to ensure that readiness status is accurately reflected in application materials and additional documents may be requested from applicants in advance of the awards. SGC may request additional documentation to assess site readiness and feasibility. All capital projects must align with applicable local/regional plans and regulations.

Site Control

Application Requirement: Lead Applicants must demonstrate an *ability* to gain site control for all proposed sites by the end of the Pre-Development Phase if awarded.

- Lead Applicants that want to establish facilities or expand existing facilities on property **not** owned by the applicants must provide a legally binding commitment or Letters of Commitment to sell that clearly states the ownership or leasehold interests of the parties. (See *Appendix F: Site Control*)
- Facilities owned or operated by public agencies must include the public agency as a Partner on the application or provide a Letter of Commitment from the public agency, if awarded, by the time the Grant Agreement is signed. This letter of commitment must:
    1. Demonstrate the public agency's intent to allow the Lead Applicant's access, occupancy, and development of the property in accordance with program requirements for the 15-year term
    2. Include a clear statement demonstrating their intent to enter into a binding agreement
    3. Be signed by an authorized signatory

Pre-Development Requirement: By the end of the Pre-Development Phase, Lead Grantees or Partners must achieve site control to demonstrate readiness prior to the Implementation Phase. (See *Appendix F: Site Control*)

Facilities owned or operated by public entities not included as Partners must enter into a binding agreement that demonstrates site control and allows the Lead Grantee to complete their grant activities on the site in compliance with all grant requirements. If the Lead Grantee or Partners are unable to secure site control, the Project may be deemed infeasible.

Implementation Requirement: Lead Grantee must provide SGC with a recorded deed restriction, Memorandum of Unrecorded Grant Agreement (MOUGA), or Notice of Unrecorded Grant Agreement for each site acquired or improved upon with CRC funding by the end of the second year of the grant term; note that the grant term begins with the start of the Pre-Development phase.

Project Site and Land-use Analysis

Application Requirement: Lead Applicants must conduct a Project Site Analysis for the CRC Site (especially for emergency ingress and egress, as required by California Building Code including Section 503) and demonstrate that road capacity around the proposed primary CRC Site can function as proposed in the application. The Project Site Analysis must be completed in consultation with emergency service providers. Lead Applicants must also conduct a Land-use Analysis for land-use/zoning compatibility to demonstrate land-use/zoning suitability for the proposed CRC Project. Lead Applicants will need to identify existing land uses, verify zoning requirements for the proposed primary CRC Site, and provide additional information about coordination with emergency service providers.

Lead Applicants must complete a Project Site Analysis and Land-use Analysis using a CRC-provided template.

This is not an Application Requirement for Partner Sites that will not serve as CRCs. However, SGC may request project site or land use analyses from the Grantee for Partner Sites during the Pre-Development Phase.

Facility Floor Plans

Application Requirement: Lead Applicants must provide draft CRC Facility floor plans that detail space for the features identified in the application (e.g., seating, storage of emergency supplies, potential battery storage, overnight sheltering capacity). This is also a requirement for any Partner Site that will carry out CRC functions, such as overnight shelter, or will require CRC-funded improvements.

Pre-Development Requirement: During the Pre-Development Phase, Lead Grantees must provide final floor plans that detail features in the application and the required features as outlined in *Section 5.4 Implementation Grant Requirements*. This is also a requirement for any Partner Site that will carry out CRC functions, such as overnight shelter, or will require CRC-funded capital improvements.

Facility Condition Assessment

Application Requirement: Lead Applicants with an existing facility are strongly encouraged to conduct and submit a Facility Condition Assessment (FCA) prior to application. The FCA must be no more than five years old and must be completed by a licensed professional. (Note that Lead Applicants may submit a FCA which was completed more than five years ago to justify anticipated work in the application work plan and budget, but this will not fulfill the Pre-Development requirement). This is not a requirement for Partner Sites that will not carry out CRC functions. (See *Section 5.4 Implementation Grant Requirements* for a list of CRC required functions).

Pre-Development Requirement: During the first six months of the Pre-Development Phase, all Lead Grantees whose application proposes an existing facility for a CRC Facility must provide a recent Facility Condition Assessment (FCA) conducted in the last five years by a licensed professional which provides an overview of:

- The current condition of building systems and structures
- Cost of repair or replacement of any building systems or structures
- Costs associated with replacement of building components as they degrade
- The expected useful life of building systems and structures
- Recurring probable expenditures

Lead Applicants who have an FCA that is more than five years old must submit an updated FCA within the first six months of the Pre-Development Phase. This is not a requirement for Partner Sites that will not carry out CRC functions. However, if the Lead Grantee intends to use a Partner Site to fulfill CRC functions, such as overnight shelter, SGC may request an FCA or equivalent certification to ensure the building's safety and accessibility during the Pre-Development Phase.

If an FCA conducted after application submittal finds building systems or structures in need of repair or replacement that have not been accounted for in the original project budget, Lead Grantees will be required to re-allocate funding from another component of their application to cover the cost of the identified repairs/replacement. (See *Appendix H: Facility Condition Assessments)*

7.7 Permitting and Environmental Compliance Ⓘ

Implementation Grants Ⓘ

Permitting

Application Requirement: Lead Applicants must answer narrative questions to identify all permits required to implement the proposed Project as described in the application work plan and budget and verify that the required permit(s) can be obtained before the end of the Pre-Development Phase.

Pre-Development and Implementation Requirement: Lead Grantees or their contracted vendors will acquire all necessary permits during Pre-Development and Implementation Phase.

California Environmental Quality Act (CEQA)

Application Requirement: Before submitting an Application, Lead Applicants and Partners must consult with the public agency or agencies that have permitting authority over the Project Area in the application to determine what is required to comply with CEQA. Following this consultation, Lead Applicants must submit:

- Documentation, as specified in the application, that demonstrates this consultation took place and its outcomes
- Information on the project’s CEQA status
- A plan, including a draft timeline and details on consultation with the appropriate public agency or agencies to determine what is required of the proposed project to comply with CEQA. This plan should demonstrate that any pending environmental review will be completed during the Pre-Development Phase and within the first year of the grant term.
- If environmental review has already been completed, the Lead Applicant and/or Partner(s) must provide documentation showing that the project is CEQA compliant.

Pre-Development Requirement: The Lead Grantee must provide documentation of CEQA compliance to SGC by the end of the Pre-Development Phase (within the first year of the grant term) to establish project readiness before beginning construction. This includes documentation from projects showing that CEQA does not apply, or that the project is categorically exempt.

The following documentation is required for projects that are categorically exempt, statutorily exempt, or not considered a project under CEQA:

- A CEQA Notice of Exemption (NOE) that has been approved by the appropriate body pursuant to their obligations under CEQA **or**
- Documentation that the project is CEQA compliant, including but not limited to:
    - A resolution adopted by the legislative body (e.g., City Council, Board of Supervisors) confirming a project’s exemption. If a resolution or similar mechanism is not available or does not exist, meeting minutes documenting the legislative

body's consideration and approval of the project's CEQA compliance may be submitted.
    - A signed letter or similar document from the head of an administrative approving entity (e.g., Planning Director).

The following documentation is required for all other projects:

- A file-stamped Notice of Determination

Projects are still subject to statutes of limitation for legal challenges, which vary depending on the type of CEQA filing and whether a CEQA filing occurs (Public Resources Code, § 21167):

- Filing a Notice of Determination: 30 days
- Filing a Notice of Exemption: 35 days
- No filing: 180 days

SGC considers the project fully compliant with CEQA only after the statute of limitations has lapsed. Lead Grantees must notify SGC when the statutes of limitations have lapsed for each project, and if any legal challenges arise. If a legal challenge is brought against a project, SGC has the authority to issue a Stop Work Order.

Tribal applicants: SGC, Tribal applicants, and Technical Assistance providers will determine CEQA requirements during the Application Period on a project-by-project basis in accordance with all applicable laws and regulations. If proposed projects are within federally recognized Tribal boundaries, this should be noted in application materials. It is not the intention of SGC to impose any additional requirements on Tribal applicants beyond what is required by existing laws and regulations.

7.8 Project Financial Feasibility

All Grant Types

Project Work Plan and Budget

Application Requirement: Lead Applicants must be able to demonstrate that the Project is financially feasible by submitting a draft project work plan and budget (using the Application Workbook template provided by SGC). The work plan and budget must reflect all proposed grant activities, line-item costs, cost categories, funding sources, and proposed deliverables. Cost estimates must also be submitted for the proposed purchase of any equipment with a per unit cost of $5,000 or more, and for any proposed contractors. The work plan and budget shall address the following activities and costs:

- The full or part-time staff dedicated to implementing the proposed work plan and budget
    - The personnel budget should be inclusive of new staff that would be hired and use fully burdened rates that include employee benefits and salary adjustments within the grant term
- Participant compensation, if applicable

- Supplies and equipment costs, if applicable
- Contractor costs, if applicable
- Travel costs, if applicable
- Training costs, including peer-to-peer learning opportunities
- Optional contingency up to 10% of the total budget
- Indirect costs up to 15% of the total grant award excluding Implementation Costs and any equipment with a cost of $5,000 per unit or more. The indirect cost will be reimbursed as a percentage of direct costs, minus Implementation Costs and equipment with a unit price of $5,000 or more.
- See *Section 6.1 Eligible Costs* for additional flexibility for California Native American Tribes

If the expected project budget exceeds the requested amount of CRC grant funds:

- Lead Applicants must indicate leverage funding sources within the budget with supporting documentation (See *Appendix J: Leverage Funding*)
- Leverage funds may not be supplanted by CRC funding for any element of the Project.
- Lead Applicants must ensure a funding gap of no more than 10% of overall project amount. At application, funding gaps in excess of 10% will not pass the program threshold review stage.*
- Lead Applicants must submit a plan for closing the funding gap and a list of potential funding sources to demonstrate financial feasibility.
- The State may request additional documentation to assess financial feasibility.

**Note: To be eligible for full project feasibility points at application scoring, Implementation Grant applicants must demonstrate that their project has a funding gap of 5% or less. Lead Applicants must demonstrate this in the application budget and provide proof of committed funding*. (See *Section 8.5 Planning Grant Program Thresholds and Scoring Criteria* and *Section 8.6 Implementation Grant Program Thresholds and Scoring Criteria*)

Within the work plan and budget template that is provided at application, direct costs will be categorized using the categories outlined in *Section 6: Program costs*.

These work plans and budgets will be refined after award. Please see *Appendix K: Post-Award Consultation Process and Polices - Planning Grants* and *Appendix L: Post-Award Consultation Process and Policies - Implementation Grants*.

Implementation Grants I

Pre-Development Requirement:

During the Pre-Development Phase, Lead Grantees and Partners will work with SGC staff and the TA provider to refine their project work plan and budget. This includes the following where applicable:

- Detailed budgets with expenses itemized (as requested by SGC) and broken out by cost categories and cost sub-types (See *Section 6: Program Costs*)
- Project schedules with anticipated completion timelines
- Deliverables and milestones that are:
    - Clear, specific, and relate directly to the work plan and budget line item
    - Quantified where relevant
    - Supported by defined documentation that will fulfill deliverables

If funding gaps arise and/or leverage funding commitments shift, the State may request Lead Grantees to re-scope their overall project to ensure project completeness. Any new leverage funding source identified during the grant term is subject to the same supporting documentation requirements. (See *Appendix J: Leverage Funding*)

After the work plan and budget are reviewed and approved, SGC staff will convert the detailed application materials into a simplified scope of work (timeline, budget, and deliverables) for Exhibit B of the Grant Agreement. Please see *Appendix L: Post-Award Consultation Process and Policies - Implementation Grants*.

Project Schedule

Application Requirement: Within their project work plan and budget, Lead Grantees must provide an estimated procurement schedule for architects, engineers, and construction contractors, as applicable, and an approximate timeline for construction completion. This should include any capital projects at Partner Sites. Applicants are not responsible for a cost-loaded construction schedule at application.

Pre-Development Requirement: Lead Grantees must provide a construction project schedule prior to the Implementation Phase of the project. The project schedule must include project activities and durations, and it must be broken down in sufficient detail to manage the work. This requirement applies to all proposed capital projects, including any work at Partner Sites.

Construction Cost Estimates

Application Requirement: Lead Applicants must provide draft estimated construction and Project Costs in the application work plan and budget. To ensure all costs are considered and the correct grant amount is being requested, the construction cost estimate must be prepared by, or reviewed by, an architect, engineer, or another reputable California based source. The cost estimate shall contain the estimated cost of construction, architectural/engineering fees, and related costs, as a breakdown of the total project cost by activity and funding source, if funds other than the CRC funds will cover a portion of the project's construction costs. This requirement applies to all proposed capital projects, including any work at Partner Sites.

Pre-Development Requirement: During the Pre-Development Phase, Lead Grantees must submit final construction cost estimates based on the project's final plans and specifications, created by a third-party, to the SGC staff to demonstrate cost reasonableness for the total proposed capital project. The cost estimate must be prepared by, or reviewed by, an architect, engineer, or another reputable California based source. The cost estimate shall contain the estimated cost of construction, architectural/engineering fees, and related costs, as a breakdown of the total project cost by activity and funding source. This requirement applies to all proposed capital projects, including any work at Partner Sites.

Operations and Maintenance Plan

Application Requirement: Lead Applicants must respond to narrative questions addressing the long-term operation and maintenance of the proposed CRC Facility, including:

- Identify the party responsible for the long-term operations, maintenance, and ownership of all components of the grant beyond the CRC grant term.
- Describe anticipated funding sources to support operations and maintenance costs which should be sufficient to cover all phases of the project through the grant term and the 15-year use requirement, as applicable.
- Anticipated costs should include, but are not limited to the operation and maintenance of:
    - Facilities and Partner Sites
    - Equipment
    - Vehicles
    - Infrastructure
    - Programs and services
- The entity responsible for long-term operations, maintenance, and ownership of each component must attest to this at application.

Submission of full operations and maintenance plans are optional at time of application.

Pre-Development Requirement: By the end of the Pre-Development Phase, Lead Grantees must submit a draft Operations and Maintenance Plan, including coordination with the appropriate responsible parties. Operations and Maintenance Plans should include consideration of any Partner Sites and include sufficient funding to cover all phases of the project through the grant term. The Operations and Maintenance Plan should address the 15-year use requirement for the CRC Facility and Campus Amenities.

Long-term Use of the CRC Facility

Application Requirement: Lead Applicants must commit to the CRC Site's dedicated use as a community-serving facility for a minimum of 15 years after project implementation is complete.

As noted in *Section 7.6 Site Control and Readiness*, leased facilities must provide both a copy of the lease and a signed Letter of Commitment from the landowner giving permission to develop the proposed Project and provide long-term maintenance, as applicable, satisfactory to SGC.

Grant Term Requirement: By the end of the second year of the grant term, Lead Grantee must provide SGC with a recorded deed restriction, Memorandum of Unrecorded Grant Agreement (MOUGA), or Notice of Unrecorded Grant Agreement for each site acquired or improved upon with CRC funding. The recorded deed restriction, MOUGA, or Notice of Unrecorded Grant Agreement must demonstrate the site's dedicated use as a community-serving facility for a minimum of 15 years after Project implementation is complete.

7.9 CRC Emergency Plan and Community Resilience Plan ℹ

CRC Emergency Plan

Application Requirement: Lead Applicants must submit a draft CRC Emergency Plan using an SGC-provided template. The draft plan should demonstrate the CRC Facility's ability to serve the community during emergencies, with specific attention to priority populations. (See *Section 1.5 Investing in Priority Communities and Populations*). It should also address what role, if any, Partner Sites will have during activation (if applicable). The Draft Emergency Plan must, at minimum, contain the following details:

- Policies and procedures for:
  - Activation of the CRC Facility in response to an emergency, including weather respite and/or overnight emergency sheltering (if applicable)
  - Evacuation of the CRC Facility in case of imminent emergency or hazard
  - Activation and evacuation of Partner Sites, if applicable
- Alignment with relevant local emergency planning documents including the General Plan Safety Element, Local Hazard Mitigation Plan, and/or County Emergency Operations Plan
- Consistency with the Site and Land Use Analysis developed in consultation with emergency service providers and local permitting authorities

If the County in which the CRC is located is not a Lead Applicant or Partner, applicants must submit a copy of their communication of a Notice of Intent to Apply sent to the relevant County(s) Office of Emergency Services.

Implementation Requirement: Lead Grantee must submit a completed final CRC Emergency Plan not less than 90 days prior to the end of the Implementation Phase. The CRC Emergency Plan must contain all components described in *Section 5.4 Implementation Grant Requirements .*

Additionally, the Lead Grantee will be required to submit signed Letters of Commitment or a Memorandum of Understanding/Agreement (MOU/MOA) with relevant County entities detailing emergency activation procedures or identifying the CRC as a county shelter resource by the end of the Implementation Phase. SGC staff will maintain the ability to field requests for alternative means of demonstrating compliance with this requirement (*See Section 5.4 Implementation Grant Requirements*).

Community Resilience Plan

Application Requirement: Lead Applicants must submit a draft Community Resilience Plan using an SGC-provided template. The draft plan should demonstrate the CRC Facility's ability to provide programs and services year-round, with specific attention to priority populations. (See *Section 1.5 Investing in Priority Communities and Populations*)

The draft Community Resilience Plan must include:

- Proposed year-round resilience programs, services, and activities
- The role of proposed Partners in year-round resilience
- Alignment with the Implementation Grant Strategies proposed at time of application (See *Section 5.3 Implementation Grant Strategies*)

Implementation Requirement: Lead Grantee must submit a complete Community Resilience Plan not less than 90 days prior to the end of the Implementation Phase. The final Community Resilience Plan will expand on the draft Community Resilience Plan submitted with the application. The final plan should be informed by community engagement and include the programs, services, and elements of the main CRC Facility and any Partner Sites.

See *Section 5: Implementation Grants* for more information about year-round services and programs.

Section 8: Application and Scoring

Summary of Section 8

This section outlines the CRC Program Round 2 application submission process, application review process, and application Scoring Criteria, including threshold scoring requirements. The application due date will be provided in the Notice of Funding Availability (NOFA).

8.1 Application and Scoring Overview

All Grant Types

Grant applications will be evaluated and awarded through a competitive process. Applications will be submitted electronically through Submittable, an electronic application platform. SGC will provide instructions on how to apply and when the application is due in the NOFA and application materials.

All applications and submitted materials will be treated in accordance with California Public Records Act (CPRA) requirements, (California Government Code § 7920.000 et seq.). Materials provided by applicants in response to a NOFA from SGC, subject to specific exceptions, will generally be deemed public records subject to production under a properly filed CPRA request after grant award. Applicants shall refrain from including sensitive personally identifiable information (PII).

Staff recommendations, including a summary of applications received, will be made available for public review ten days prior to SGC's public meeting where the Council Members will make final awards.

8.2 Award Amounts

SGC received funding to implement Round 2 of the CRC Program, which will provide grants, staff support, and technical assistance. Because the CRC Program seeks to serve a diverse set of communities, Lead Applicants have the flexibility to request the amount of funding needed to carry out the work described in their application within the grant term.

Lead Applicants may only apply for one grant type and may request funds within the following award ranges:

- For CRC Planning Grants, applicants may request between $100,000 to $500,000.
- For CRC Implementation Grants, applicants may request between $1 million to $10 million.

Exact award amounts are contingent on the competitive application scoring and selection process. SGC retains the right to make partial awards and to reallocate funds between CRC Round

2 grant types. Application reviewers may recommend projects for partial award for many reasons, including:

- Concerns regarding the feasibility of all proposed programs and services within the grant term
- Ineligible costs that are included in the application
- Funding remains; for example, if funding remains after awarding the highest scoring applicants, partial awards may be made to the next highest scoring applicant(s)

8.3 Application Process

All Grant Types

The California Strategic Growth Council (SGC) will provide instructions on how to apply for CRC Round 2 funding, as well as the application due date, with the NOFA and application materials. Once the NOFA is announced, the application will open. Below is an overview of the application process.

1. **Program Guidelines:** The Final Round 2 CRC Program Guidelines are adopted by the Council and published on the SGC website at https://sgc.ca.gov/grant-programs/crc/application.
2. **Application Technical Assistance**: Eligible Lead Applicants can request Application Technical Assistance by completing and submitting a Technical Assistance Request Form online
3. **Application Period:** The NOFA is announced and the Application Period begins; the application remains open for approximately two to four months. All applications are due on the Submittable platform at the date and time specified in the NOFA.
4. **Program Threshold Review:** SGC staff conduct a completeness and threshold review of applications and notify Lead Applicants of their priority community designation and any missing documentation. Lead Applicants will have a brief window to resolve. If an application remains incomplete and/or is unable to meet the Program Thresholds, the application will not proceed to the next step of the review process. (See *Section 8.5 Planning Grant Program Thresholds and Scoring Criteria* and *Section 8.6 Implementation Grant Program Thresholds and Scoring Criteria*. If an application remains incomplete and/or is unable to meet the Program Thresholds, the application will not proceed to the next step of the review process.
5. **Full Application Review:** Applications that pass threshold review will move on to a full application review and scoring process which is completed by SGC staff and the Interagency Review Panel using the Scoring Criteria outlined below in *Section 8.4 Funding priorities and Priority Points* through *Section 8.7 Close Scores Protocol*
6. **Awards:** Following full application review and scoring, CRC Program staff present recommendations to the Council. Staff recommendations will be posted on SGC's website 10 days prior to SGC's public meeting where the Council Members will make final awards.

The Council considers staff recommendations and makes final awards at a Council meeting.

During the Application Period, SGC reserves the right to issue clarifications and minor modifications to the application instructions and requirements as needed. Any changes will be communicated promptly as needed.

Application Technical Assistance Request Form

Technical assistance is available to help eligible applicants develop their applications. Following the release of the Final Round 2 CRC Program Guidelines, staff will release the Technical Assistance Request Form. Please note that Application Technical Assistance availability is limited. Eligible applicants should fill out the form as soon as they are able, and CRC Program staff will connect eligible applicants to third-party Technical Assistance providers pending availability. For more information on technical assistance and eligibility, please see *Section 10.1 Application Technical Assistance*.

8.4 Funding Priorities and Priority Points

SGC intends to prioritize Tribal applicants and applications from under-resourced and unincorporated or rural communities across the state, while ensuring geographic diversity in alignment with statutory requirements.

Geographic Diversity Funding Goal

SGC intends to fund CRC Planning and Implementation Grants that build climate and community resilience while representing statewide geographic diversity, inclusive of rural and urban communities, incorporated and unincorporated areas, and a range of climate impacts. Statewide geographic diversity is specifically required of the CRC Program per statute AB 211 and the Climate Bond. SGC intends to consider geographic diversity in final award decisions using the Cal OES Fire and Rescue Division's Mutual Aid Regions.

SGC aims to make one eligible Planning Grant Award in each Cal OES Fire and Mutual Aid Region. Final award selections will aim to reflect broad regional distribution based on the competitiveness and eligibility of applications. (See *Appendix G: Cal OES Fire and Rescue Division Mutual aid Regions*)

Tribal Funding Goal

The CRC Program intends to fund a minimum of one eligible Planning Grant application and one eligible Implementation Grant application where the Lead Applicant is a California Native American Tribe or a Tribally-owned nonprofit (or "Tribal applicant" as defined in *Section 2: California Native American Tribes and Tribal Applicants* and *Appendix A: Terms and Definitions*) This Funding Goal is intended to prioritize a portion of the CRC Program Round 2 funding for Tribal applicants.

An application is eligible for the Tribal Funding Goal if the Lead Applicant is considered a Tribal applicant, meaning that the Lead Applicant meets one of the following conditions:

- The Lead Applicant is a **California Native American Tribe**, defined as a federally recognized Native American Tribe or non-federally recognized Native American Tribe listed on the California Tribal Consultation List maintained by the Native American Heritage Commission on February 19, 2026.
- The Lead Applicant is a **California Native American Tribally-owned nonprofit** (also referred to as a Tribally-owned nonprofit), defined as an organization exempt from taxation under the Internal Revenue Code 501 (c)(3) (26 U.S.C. § 501(c)(3)), nonprofit organization incorporated under tribal law, a California nonprofit public benefit corporation (Corporations. Code, § 5110 et seq.), or equivalent that has a majority Tribal-led board, is operated by a California Native American Tribe, and advances the Tribe's goals and priorities. The Tribe must be a *California Native American Tribe*. A Tribal nonprofit is required to provide a Letter of Authorization or Resolution on behalf of the Tribe they represent.

If multiple California Native American Tribes apply for both Planning and Implementation Grants, SGC will apply the Scoring Criteria from these Program Guidelines to rank the applications. The top-ranked Planning Grant application and top-ranked Implementation Grant application will be awarded under the CRC Program's Tribal Funding Goal, and the remaining application(s) will compete with all other submitted applications. Only applications that are complete and meet all the CRC Program eligibility requirements will be considered for the Funding Goal (See *Section 7.1 Program Requirements Overview*).

If the CRC Program does not receive eligible Planning or Implementation Grant applications from California Native American Tribes or Tribally-owned nonprofits, SGC will release the unused funds to the general CRC Program funding pool.

Priority Points

The following applicants will receive additional, Priority Points.

Priority Communities

The following applications will receive **10 points** (Implementation Grants) or **5 points** (Planning Grants):

- If the Lead Applicant is a Tribal applicant AND has a proposed CRC Facility located in an under-resourced community

The following applications will receive **6 points** (Implementation Grants) or **3 points** (Planning Grants):

- If the Lead Applicant is a Tribal applicant

- If Lead Applicant has a proposed CRC Facility located in a rural community that meets the definition of an under-resourced community (*See Section 1.5 Investing in Priority Communities and Populations* and *Appendix A: Terms and Definitions*)
- If Lead Applicant has a proposed CRC Facility located in an unincorporated community that meets the definition of an under-resourced community (See *Appendix A: Terms and Definitions*)

The following applications will receive **4 points** (Implementation Grants) or **2 points** (Planning Grants):

- If Lead Applicant is a nonprofit organization whose mission is primarily focused on serving Tribal communities AND their proposed grant programs and services primarily focused on serving Tribal communities
- If the proposed CRC Facility is located in an under-resourced community (See *Appendix A: Terms and Definitions*)

An applicant can receive a maximum of 10 points (Implementation Grant) or 5 points (Planning Grant) in the priority communities' category.

Previous SGC and LCI Grantees

Applications that build on work funded by SGC or the Governor's Office of Land Use and Climate Innovation (LCI) may be eligible for Priority Points. These points support communities through the project pipeline and prioritize applicants advancing SGC- or LCI-funded planning and project development work.

Applications who meet all of the following conditions will receive **2 points** (Implementation Grants) or **1 point** (Planning Grants):

- The proposed Planning or Project Area is located in the same area as the previous SGC- or LCI-funded work, AND
- At least one Lead Applicant or Partner was a Lead Applicant or Partner on a previous SGC or LCI grant, AND
- The proposed project is a direct continuation of the work previously funded by SGC or LCI. For example, Lead Applicant or Partner(s) were a previous recipient of a CRC Planning Grant or Project Development Grant and are now applying for a CRC Implementation Grant.

8.5 Planning Grant Program Thresholds and Scoring Criteria Ⓟ

Planning Grant Program Thresholds Ⓟ

Planning Grant applications must meet the Program Thresholds outlined in this section. If SGC staff identify missing documentation during the Planning Grant Program Threshold review, they will notify Lead Applicants and give them a brief window to resolve. If an application remains incomplete or is unable to meet the Program Thresholds, their application will not proceed to the next step of the review process. (See *Appendix D: Program Requirement Overview*)

General Completeness

- Application is complete, includes all required supporting documentation, complies with submission requirements, and is submitted on time

Applicant Eligibility

- Lead Applicant is based in California and is an eligible applicant based on the eligible organization types detailed in these Guidelines. (See *Section 3.1 Eligible Applicants*)
- If the Lead Applicant is a public agency or a Tribal applicant, they have provided the required documentation listed in *Section 3.1 Eligible Applicants*.
- Application includes at least one Partner in addition to the Lead Applicant. Please note that Tribal applicants do not need Partners in certain situations. (See *Section 3.1 Eligible Applicants*)

Planning Area Eligibility

- The Planning Area is clearly defined, eligible, and site(s) are identified by address (if available) and coordinates. The Planning Area includes a specific CRC Facility site and the proposed planning activities, and the impacted community around the proposed site(s). (See *Section 3.3 Eligible Planning and Project Areas*)

Community Engagement

- Prior community engagement to date and the draft Community Engagement Plan involve residents, community-based organizations, and key partners from the Planning Area throughout all phases of the CRC Project. (See *Section 7.4 Community Engagement*)

Site Control and Readiness

- The Lead Applicant has provided a detailed plan describing how the Lead Applicant or proposed Partners plan to demonstrate the ability to gain site control no later than 90 days prior to the end of the grant term if awarded. (See *Section 7.6 Site Control and Readiness*)

Applicant Capacity

- The Lead Applicant has provided the required information to demonstrate their management and financial capacity to implement the grant, if awarded. (See *Section 7.3 Applicant Capacity*)

Project Financial Feasibility

- The Lead Applicant has demonstrated that the project is financially feasible by submitting a draft project work plan and budget. The work plan and budget must reflect all proposed grant programs and services, line-item costs, cost categories, funding sources, proposed deliverables, and must describe the full or part-time staff dedicated to implementing the proposed project programs and services. The budget must reflect cost caps for each relevant cost category established in *Section 6.1 Eligible Costs*.

Planning Grant Scoring Criteria Ⓟ

If an application meets all Program Thresholds, the SGC staff and the Interagency Review Panel will review and score the application using the Planning Grant Scoring Criteria outlined here. CRC Planning Grant applications will be scored out of a **total of 106 points** according to the following criteria.

Table 3: CRC Planning Grants Scoring Criteria Summary

SCORING CRITERIA	POINTS
Vision and Objectives	18 points
Community Profile, Engagement, and Partners	32 points
Project Impact	32 points
Priority Points	6 points
TOTAL	**88 points**
Top-scoring applicants will be scored on the following:	
Project Feasibility	18 points
TOTAL INCLUDING PROJECT FEASIBILITY	**106 points**

Please see *Section 8.4 Funding Priorities and Priority Points* for the breakdown of Priority Points for eligible CRC Planning Grant applicants.

Please see *Section 8.7 Close Scores Protocol* for information on how SGC will use a “Close Scores Protocol” to award Planning Grants that score within 0.5 points of each other.

Vision and Objectives (18 points total)

1. **Vision Statement (6 points)**: The Vision Statement is clear, community-informed, and demonstrates how the grant activities meet the CRC Program approach and the Planning Grant Program objectives.
2. **Proposal alignment (6 points)**: The proposed Planning Grant activities effectively align with the outlined Vision Statement and advance community priorities.
3. **Planning Area (6 points)**: The Planning Area is selected through consultation with local residents and Partners.

Community Profile, Engagement, and Partners (32 points total)

4. **Community profile (8 points)**: The narrative responses provide a comprehensive description of the community, built environment, and community resilience. The narrative descriptions include quantitative or qualitative data gathered from community knowledge and histories, and/or one or more data sources. Applicants identify and describe local priority populations and other vulnerable residents, including strengths and opportunities.
5. **Prior community engagement (7 points)**: The narrative description of community engagement to date and demonstrates that the Lead Applicant:
    - Utilized culturally appropriate and tailored methods to engage diverse community representatives
    - Minimized barriers to participation
    - Used community input to inform the CRC application
    - Included direct outreach, engagement, and improved outcomes for local priority populations and other vulnerable residents
6. **Future community engagement (7 points)**: The draft Community Engagement Plan:
    - Proposes specific methods to engage diverse community representatives, includes details on accountability measures and feedback loops for incorporating community input into project activities, and provides ongoing opportunities for interested community members to remain engaged
    - Clearly outlines timelines, roles and responsibilities for Partners, and, when appropriate, incorporates methods successfully used in previous engagement efforts
    - Ensures community engagement activities have adequate resources for implementation, and are aligned with project proposal, work plan, and budget
7. **Proposed Collaborative Governance Structure (10 points)**: Narrative description proposes a diverse list of partners for the Collaborative Governance Structure, and a vision for the Collaborative that is aligned with the CRC proposal:
    - Lead Applicant and Partners have demonstrated history of working together and/or in similar collaborative relationships. If they do not have a working history, they have a plan for building trusting relationships to support Collaborative Governance. If a Tribal Applicant does not have funded Partners, they will receive full points if they can demonstrate they have established, or plan to establish, working relationships with any Tribal entities and/or individuals involved in the project.

8. Narrative responses describe a path for local residents and community-based organization (CBO) involvement in decision making. Tribal applicants will not be evaluated on the inclusion of non-Tribal entities. Tribal applicants will receive full points if they can demonstrate broad support and involvement from entities and individuals within the Tribe.

Project Impact (32 points total)

9. **Climate hazards (6 points):** Lead Applicant identifies and describes the top two to three climate hazards within the Planning Area using the best available local reports, quantitative or qualitative data, and/or community knowledge and histories.
10. **Impacts (6 points):** Lead Applicant analyzes the impact of these climate hazards on the most vulnerable, at-risk community members using the best available quantitative or qualitative data and/or community knowledge and histories.
11. **Factors of community resilience (4 points):** Lead Applicant describes the characteristics, policies, programs, or other factors that make the community resilient to the climate impacts described.
12. **Building climate and community resilience (6 points):** The Planning Grant activities address these climate impacts and build both climate resilience and community resilience.
13. **Programs and services (10 points):** The Planning Grant Activities, as described in the narrative responses and workbook, advance the CRC Program Approach and Planning Grant Objectives.

Project Feasibility (18 points total)

Only top-scoring CRC Planning Grant applicants will be scored on Project Feasibility.

14. **Technical expertise and experience (10 points):** Through the work plan, budget, narrative descriptions, and supporting documentation, the application demonstrates how the expertise and experience of the Lead Applicant, Partner(s), and any contractors collectively and logically align to fulfill the technical needs required to meet all program requirements.
15. **Feasibility (8 points):** The work plan, budget, narrative descriptions, and supporting documentation demonstrate that the proposed activities are feasible to accomplish within the Planning Grant term and demonstrate adequate allocation of resources.

8.6 Implementation Grant Program Thresholds and Scoring Criteria I

Implementation Grant Program Thresholds I

Implementation Grant applications must meet the following Program Thresholds at application. If SGC staff identify missing information during the Implementation Grant Program Threshold review, they will notify Lead Applicants and give them a brief window to resolve. If an application remains incomplete or is unable to meet the Program Thresholds, their application will not proceed to the next step of the review process. (See *Appendix D: Program requirements Overview*)

General Completeness

- Application is complete, includes all required supporting documentation, complies with submission requirements, and is submitted on time.

Applicant Eligibility

- Lead Applicant is based in California and is an eligible applicant type. (See *Section 3.1 Eligible Applicants*)
- If the Lead Applicant is a public agency or a Tribal applicant, they have provided the required documentation listed in *Section 3.1 Eligible Applicants*.
- Application includes at least two Partners in addition to the Lead Applicant. At least one of these Partners or the Lead Applicant is a CBO and must be funded by the CRC Implementation Grant. California Native American Tribes and Tribally-owned nonprofits (as defined in *Appendix A: Terms and Definitions*) do not need Partners in certain situations. (See *Section 3.1 Eligible Applicants*)

Project Area and Facility Type Eligibility

- The Project Area is clearly defined, and proposed site(s) are identified and eligible. The Project Area must encompass the physical location of the CRC Facility, Campus Amenities connected to the CRC Facility, and the programs and services based out of the CRC Facility or Partner Site(s). The CRC Facility involves retrofits or development of a physical building and does not fund upgrades only to an outdoor space. (See *Section 3.3 Eligible Planning and Project Areas* and *Section 5.4 Implementation Grant Requirements*)
- Lead Applicants with a Project Area that overlaps multiple jurisdictions have submitted a Letter of Commitment from the relevant public agencies who collectively have jurisdiction over the Project Area.
    - **Note:** A Letter of Commitment is not needed if all relevant agencies with jurisdictional authority are included and sign the CGA worksheet.

Community Engagement

- The Prior Community Engagement Worksheet is complete and updated, and both prior engagement and the draft Community Engagement Plan involves residents, community-based organizations, and key Partners from the Project Area throughout all phases of the CRC project: Application, Pre-Development, Implementation, and Evaluation. (See *Section 7.4 Community Engagement*)

Collaborative Governance

- Lead Applicants has submitted the signed Collaborative Governance Agreement (CGA) Worksheet that addresses all requirements of the Collaborative Governance Agreement and demonstrates the involvement of community-based organizations and community residents within governance and decision-making processes. (See Section 3.2 Collaborative Governance and Appendix B: Collaborative Governance Structure)

Site Control and Readiness

- Lead Applicants have submitted the required documentation and demonstrated their ability to meet site control requirements by the end of the Pre-Development Phase. Lead Applicants have met Application Requirements associated with site readiness for the CRC Facility to ensure the project's preparedness. (See Section 7.6 Site Control and Readiness and Appendix F: Site Control)

Applicant Capacity

- Lead Applicants have provided the required information to demonstrate their management and financial capacity to oversee, manage, and implement their proposed CRC grant activities. (See Section 7.3 Applicant Capacity)

Project Financial Feasibility

- Lead Applicants have demonstrated the project is financially feasible by submitting a project work plan and budget as specified in Section 7.8 Project Financial Feasibility.
- If the expected project work plan and budget exceed requested award funds, Lead Applicants have included leverage funding sources within the budget and submitted evidence of committed funds to ensure a funding gap of no more than 10% of overall project amount. (See Appendix J: Leverage Funding) Projects with funding gaps of 5% or less will garner full points described in the Scoring Criteria for Project Feasibility and Interview. (See Section 7.8 Project Financial Feasibility). At application, funding gaps in excess of 10% will not pass the program threshold review stage.
- Lead Applicants with a funding gap have submitted a plan for closing the gap and a list of potential funding sources to demonstrate financial feasibility.
- The project work plan and budget demonstrate financial feasibility by including clear timelines, line items with discrete programs and detailed deliverables, cost categories and estimates for all described programs and services, funding sources, and alignment with program cost category percentage caps.

Operations and Maintenance Plan

- Lead Applicants have provided narrative responses to operations and maintenance questions at time of application as specified in Section 7.8 Project Financial Feasibility.

Permitting and Environmental Compliance

- Lead Applicants have demonstrated that environmental review, necessary to comply with CEQA, can be completed during the Pre-Development Phase and within the first year of the grant term. (See *Section 7.7 Permitting and Environmental Compliance*)
- Lead Applicants have identified all permits required to implement all proposed components of the proposed Project as described in the application work plan and budget, and verified the required permit(s) can be obtained during their relevant project phase. (See *Section 7.7 Permitting and Environmental Compliance*)

Long-term Use of CRC Facility

- Lead Applicants have committed to the site's dedicated use as a community-serving facility for a minimum of 15 years after project implementation is complete. (See *Section 7.8 Project Financial Feasibility*)
- For leased facilities, Lead Applicants must provide both a copy of the lease and a signed Letter of Commitment from the landowner giving permission to develop the proposed Project and provide long-term maintenance, as applicable, satisfactory to SGC. (See *Section 7.8 Project Financial Feasibility*)

Implementation Grant Requirements

- Lead Applicants have demonstrated commitment to meet the Implementation Grant requirements by the end of the grant term and certified that the CRC will be publicly available and offer year-round programs and services. For CRCs on Tribal land, "public" requirements should be interpreted to apply to the Tribal community and not to the public beyond that Tribal community. Applications may include more than one site, provided that at least one site (CRC Facility and Campus Amenities) fulfills all required CRC Program functions and features and meets site readiness requirements. (See *Section 5.4 Implementation Grant Requirements*)
- Lead Applicants have provided draft CRC Emergency Plans and Community Resilience Plans on SGC provided templates and committed to submitting finalized plans 90 days prior to the end of the CRC Implementation Phase. (See *Section 5.4 Implementation Grant Requirements)*

CRC Strategies

- Lead Applicants have selected and proposed activities that advance at least four CRC Implementation Grant Strategies within the Project Area to achieve the CRC Implementation Grant Program objectives. (See *Section 5.3 Implementation Grant Strategies)*

Implementation Grant Scoring Criteria

If an Implementation Grant application meets all Program Thresholds, SGC staff and an Interagency Review Panel will review and score the application using the Implementation Grant Scoring Criteria below.

CRC Implementation Grant applications will be scored out of a **total of 233 points** according to the following criteria.

Table 4: CRC Implementation Grants Scoring Criteria Summary

SCORING CRITERIA	POINTS
Vision and Objectives	15 points
Community Profile, Prior Community Engagement, and Engagement Plan	50 points
Collaborative Governance Structure and Partnerships	50 points
Project Impact	61 points
Priority Points	12 points
TOTAL	**188 points**
Top-scoring applicants will be scored on the following:	
Project Feasibility	25 points
Interview	20 points
TOTAL INCLUDING PROJECT FEASIBILITY & INTERVIEWS	**233 points**

Please see *Section 8.4 Funding Priorities and Priority Points* for the breakdown of Priority Points for eligible CRC Implementation Grant applicants.

Please see *Section 8.7 Close Scores Protocol* for information on how SGC will use a “Close Scores Protocol” to award Implementation Grants that score within 1 point of each other.

Vision and Objectives (15 points total)

1. **Vision Statement (5 points):** The Vision Statement is clear, community-informed and demonstrates how the grant activities meet the CRC Program approach and the Implementation Grant Program objectives
2. **Proposal alignment (5 points):** The selected CRC Strategies, capital projects, and program and services effectively align with the outlined Vision Statement and advance community priorities
3. **Project Area (5 points):** The Project Area was selected through consultation with local residents and Partners

Community Profile, Prior Community Engagement, and Engagement Plan (50 points total)

4. **Community profile (10 points):** The narrative descriptions of community, built, environment, and community resilience are comprehensive. The narrative descriptions include quantitative and/or qualitative data that is gathered from community knowledge and histories, and/or one or more data sources. Lead Applicants identify and describe local priority populations and other vulnerable residents, including strengths and opportunities.
5. **Prior community engagement (20 points):** The Prior Community Engagement Worksheet provides a description of community engagement efforts that informed the CRC proposal and demonstrates the Lead Applicant:
    - Utilized culturally appropriate and tailored methods of engagement to engage diverse community representatives
    - Minimized barriers to participation
    - Used community input to directly inform the selected CRC Strategies, capital projects and programs/services
6. **Future community engagement (20 points):** The draft Community Engagement Plan:
    - Proposes specific methods to engage diverse community representatives, includes accountability measures and feedback loops for incorporating community input into project activities and provides ongoing opportunities for interested community members to remain engaged.
    - Clearly outlines timelines, roles and responsibilities for Partners. When appropriate, the Plan incorporates methods successfully used in previous engagement efforts.
   - Ensures community engagement activities have adequate resources for implementation, and are aligned with selected strategies, capital projects, and programs and services included in the work plan and budget

Collaborative Governance Structure and Partnerships (50 points total)

7. **Partnerships and collaboration (8 points):** Lead Applicant and Partners have demonstrated history of working together and/or similar collaborative relationships. If they do not have a working history, they describe a plan for building trusting relationships to support Collaborative Governance. If a Tribal Applicant does not have funded Partners, they will receive full points if they can demonstrate they have established, or plan to establish, working relationships with any Tribal entities and/or individuals for this project.
8. **Subject matter expertise (7 points):** Lead Applicant and/or Partners have experience relevant to the proposed grant programs and services, including prior work in one or more of the following areas:
    - Energy resilience
    - Water resilience
    - Air quality and public health
    - Nature-based solutions and food security

- Emergency preparedness and critical communications
- Mobility and access
- Workforce development, education & training
- Local leadership and grassroots engagement
- Tribal communities
- Civic and community development
- Climate resilience awareness and activities

9. **Collaborative Governance Structure (10 points):** The Collaborative Governance Structure is composed of a diverse representation of community representatives, including local residents and community-based organizations. Please reference *Appendix B: Collaborative Governance* for a list of potential stakeholder groups to include. Tribal Lead Applicants will not be evaluated on the inclusion of non-Tribal entities. Tribal Lead Applicants will receive full points if they can demonstrate broad support and involvement from entities and individuals within the Tribe.
10. **Collaborative Governance Agreement (15 points):** The Collaborative Governance Agreement or Collaborative Governance for Tribes Worksheet is signed by the Lead Applicant and all Partners. It meets all requirements outlined in *Section 7.5 Collaborative Governance* and clearly describes a path for transparent, accountable, and inclusive methods of governance.
11. **Community experience (10 points):** Lead Applicant and/or Partners demonstrate that they have established trust with the community, and priority populations, demonstrated through previous work, engagement and/or lived experience. At least one Partner has lived experience relevant to priority populations and/or has experience working with and serving the needs of priority populations.[9] Please reference *Section 1.5 Investing in Priority Communities and Populations* for a full list and definition of these groups.

Project Impact (61 points total)

12. **Climate hazards (10 points):** Lead Applicant identifies and describes the top two to three climate hazards within the Project Area using the best available local reports, quantitative or qualitative data, and/or community knowledge and histories.
13. **Impacts (8 points):** Lead Applicant analyzes the impact of these climate hazards on the most vulnerable, at-risk community members using the best available quantitative or qualitative data and/or community knowledge and histories
14. **Factors of community resilience (5 points):** Lead Applicant describes the characteristics, policies, programs, or other factors that make the community resilient to the climate impacts described
15. **Building climate and community resilience (8 points):** The proposal’s capital projects and programs and services address these climate impacts and build both climate and community resilience
16. **Capital projects and programs/services (20 points)**: The proposal's capital projects and programs and services as described in the narrative responses and workbook:

[9] Note: These priority populations were previously described as Access and Functional Needs (AFN) communities by Cal OES.

  - Effectively align with the selected CRC Strategies
  - Advance the CRC Program approach and Implementation Grant objectives
  - Deliver meaningful project outcomes to local priority populations that are informed by community input and reflect the community needs
17. **Draft plans (10 points):**
  - The draft CRC Emergency Plan demonstrates ability to serve community during emergencies, with specific attention to priority populations. The Plan details the local emergency needs, facility use, Partner roles, notification procedures, and includes Partner Sites as applicable.
  - The draft Community Resilience Plan demonstrates ability to serve the community year-round, with specific attention to priority populations. The Plan describes the anticipated facility use throughout the year, outlines programming that meets community needs, estimates the number of community members served, and it includes Partner Sites as applicable.

Project Feasibility and Interview (45 points total)

Only top-scoring CRC Implementation Grant applicants will be scored on Project Feasibility and Interviews.

Project Feasibility (25 points)

18. **Technical expertise and experience (7 points):** Through the project work plan, budget, narrative responses, and supporting documentation, the application demonstrates that the expertise and experience of the Lead Applicant, Partner(s), and any contractors collectively and logically align to fulfill the technical needs required to successfully implement the CRC and meet all program requirements.
19. **Feasibility (5 points):** The project work plan, budget, narrative responses, and supporting documentation includes a clear, feasible timeline and next steps for meeting all Pre-Development Requirements within the Pre-Development Phase. Comprehensive status explanations have been provided for descriptions of actions that are logical to a timeline not exceeding 12 months.
20. **Capital projects and programs/services (8 points**): The project work plan, budget, responses to narrative responses, and supporting documentation demonstrate that the proposed capital projects and programs and services are feasible to accomplish within the Implementation Phase and demonstrate adequate allocation of resources. To be eligible for full points in this category, Lead Applicants must demonstrate a funding gap of no more than 5% and submit evidence of committed leverage funding.
21. **Operations, maintenance, and long-term funding (5 points):** Lead Applicant describes a plan for the long-term operation and maintenance of the proposed CRC Facility and Partner sites (if applicable) and clearly identifies the party responsible for long-term operations, maintenance, and ownership beyond the CRC grant term. The Lead Applicant identifies realistic secured or anticipated funding sources to support the operations and maintenance costs for the required 15-year long-term use of the CRC Facility and includes anticipated funding for Partner sites (if applicable) beyond the grant term.

Interview and/or Site Visit (20 points)

22. **Interview (20 points):** The interview and/or site visits may include a third-party facility assessment. Lead Applicants will be contacted to coordinate availability at least 72 hours before the interview period commences and receive all interview questions and Scoring Criteria at least 24 hours before their scheduled interviews. Panelists will score interviews independently and scores will be averaged. Example interview topics include:
    - Strength of partnerships
    - Project design and feasibility
    - Project and community impact

8.7 Close Scores Protocol

SGC will round total scores to two decimal places and will rank applications according to score. SGC will designate the top-scoring applications for award until there is not enough funding to fully fund the next highest-scoring application. SGC reserves the right to make partial awards. (See *Section 8.2 Award Amounts*)

If scores are close, SGC will use the following tiebreaker process to determine which application(s) are awarded:

1. **Identify tied applications.**
    - Applications are tied if one application would be awarded while the other would not (opposite outcome) AND the difference between the applications is:
        - Less than (within) 1 point apart (Implementation Grants);
        - or less than (within) 0.5 points apart (Planning Grants)
    - Applications are not tied if the difference is:
        - Greater than or equal to 1 point (Implementation Grants);
        - or greater than or equal to 0.5 points (Planning Grants)
2. **Use an additional reviewer's score to generate a tiebreaker:**
    - If applications are tied in Step 1, SGC will assign an additional reviewer to score each application
    - The additional score will be averaged in with the existing scores for that application. The new average will act as the tiebreaker amongst the tied applications to determine ranking.
    - The new averages will not affect application rankings outside of those applications that are tied.

Table 5 demonstrates an example of how the Close Scores Protocol will work in an Implementation Grant application scenario.

Table 55: Close Scores Protocol Example

Applicant	Raw Total Score	Awarded or Unawarded prior to tiebreaker	Does Tiebreaker Apply?
A	98	Awarded	No
B	93.5	Awarded	Tiebreaker applies, within 1 point of opposite outcome (93.5 - 1 = 92.5)
C	93	Awarded	Tiebreaker applies, within 1 point of opposite outcome (93 - 1 = 92)
D	92.9	Unawarded	Tiebreaker applies, within 1 point of opposite outcome (92.9 + 1 = 93.9)
E	92.75	Unawarded	Tiebreaker applies, within 1 point of opposite outcome (92.75 + 1 = 93.75)
F	91.7	Unawarded	No
G	90	Unawarded	No
H	85	Unawarded	No
I	82.5	Unawarded	No
J	80	Unawarded	No

Section 9: Grant Administration

Summary of Section 9

This section contains a brief description of the grant administration responsibilities and principles for CRC Planning Grants and Implementation Grants.

- Grant terms are two to six years, depending on grant type.
- Awarded applicants will go through a Post-Award Consultation Process before executing a Grant Agreement.
- Advance payment may be available in certain circumstances.
- Lead Grantees and Partners must comply with reporting and monitoring requirements.
- Lead Grantees and Partners must comply with other requirements including those related to Prevailing Wage, publicity, audit and record retention.

9.1 Grant Terms

Planning Grant terms are two years, with the option to extend on a case-by-case basis.

Implementation Grant terms are six years and include: an up to one-year Pre-Development Phase, a four-year Implementation Phase, and a one-year Evaluation Phase during which Project outcomes will be evaluated and grant close-out activities will conclude. Lead Grantees that do not require a full year in the Pre-Development Phase may move to the Implementation Phase once approved. Any remaining Pre-Development Phase term and budget can be added to the grant's four-year Implementation Phase.

In addition to the Round 2 CRC Guidelines, CRC grant requirements will be disseminated through the Grant Agreement, the CRC Grant Management Manual, CRC policy memorandums, and procedure guidance documents. All Grantees, Partners and contractors are required to follow all program requirements contained in the guidance documents.

9.2 Lead Grantees, Partners, and Contractors

The Grant Agreement will only be executed between SGC and the Lead Applicant. SGC will not enter into any contractual relationship with any Partners or procured contractors.

Once the grant has been awarded, the Lead Applicant will be referred to as the "Lead Grantee" and Partners will continue to be referred to as "Partners." SGC strongly recommends the Lead Grantee enter contractual and legally-binding sub-agreements with each Partner. These sub-agreements, along with the Collaborative Governance Agreement (CGA), will help govern the relationship between the Partners and Lead Grantee.

9.3 Post-Award Consultation Process

Applicants selected for awards will be required to participate in a three-to-six-month Post-Award Consultation (PAC) Process prior to finalizing the Grant Agreement. During this PAC Process, SGC will assist the Awardee and Partners to refine their scope of work and all accompanying attachments to comply with administrative, statutory, and program requirements.

Awardees will be required to meet with the SGC staff and provide all required documentation related to project readiness, work plan and budget, and other requested documentation during that time. The Grant Agreement must be signed within 30 days of receipt. (See *Appendix K: Post-Award Consultation Process and Policies - Planning Grants* and *Appendix L: Post-Award Consultation Process and Policies - Implementation Grants*)

For Planning Grants, the Lead Grantee and Partners will complete the PAC Process and will not complete a Pre-Development Phase.

For Implementation Grants, the Lead Grantee and Partners will complete the PAC Process and the Pre-Development Phase. (See *Section 5.6 Implementation Grant Phases*)

9.4 Disbursements and Accounting of Funds

The Lead Grantee cannot request advance payment or reimbursement for any costs incurred or work completed before execution of the Grant Agreement. After execution of the Grant Agreement, Lead Grantees may request advance payment or reimbursement from SGC:

- **For Planning Grantees**: on a quarterly basis (every three months)
- **For Implementation Grantees**: on a bimonthly basis (every two months)

SGC will consider more frequent invoicing on a case-by-case basis. SGC will retain the last 5% of the overall grant budget, to be paid once SGC has determined that the Lead Grantee has fulfilled the grant terms.

Advance Payment

SGC is authorized to provide certain Lead Grantees advance payments to ensure effective implementation of the program and to initiate Projects in a timely manner. SGC may make advance payments in the amount of up to 25% of the total grant award, spread across a series of installments throughout the grant term. The Grant Agreement will define the advance payment schedule for disbursements and reconciliation submission with additional details on the advance payment process and requirements being included in the CRC Grant Management Manual, as amended from time to time, and any advance payment policy guidance documents SGC may issue.

The Lead Grantee must develop and provide a process for Partners to request and receive advance payment. Partners must comply with reporting requirements outlined by SGC to receive advance payment. All Lead Grantees eligible for advance payment will be required to prioritize Partners that experience low cash reserves to receive advances.

SGC has statutory authority to offer advance payment to Lead Grantees that are registered as 501(c)(3) nonprofit organizations, subject to meeting specified requirements, in accordance with AB 590 (Hart, 2023) and to Lead Grantees that are federally recognized Tribes, whose territorial boundaries lie wholly or partially within the State of California in accordance with AB 3017. California Native American Tribes that are organized as a 501(c)(3) nonprofit and are not federally recognized are currently eligible as private, nonprofit organizations. Tribes may be required to submit a Limited Waiver of Sovereign Immunity to receive advance payment.

Advance payments will be limited to the minimum immediate cash requirements necessary to carry out approved programs and services. SGC will prioritize advance payment to projects serving disadvantaged, low-income, and under-resourced communities or organizations with modest reserves and potential cashflow problems.

SGC staff must keep documentation in the Lead Grantee’s Program file demonstrating that the Lead Grantee is eligible to receive advance payment.

Disbursement Process

For reimbursement payments, Partners must invoice the Lead Grantee before the Lead Grantee submits an invoice to SGC. The Lead Grantee will be responsible for compiling all invoices, supporting documentation, and reporting materials for themselves and Partners into a single invoice package.

Upon receipt of a properly submitted and undisputed invoice, SGC will process payment within 45 calendar days via check, in compliance with the Prompt Payment Act. Delays in payment may occur if invoices are incomplete, disputed, or submitted outside of agreed-upon reporting schedules. Lead Grantees are encouraged to maintain clear documentation and adhere to all reporting and invoicing requirements outlined by SGC to ensure timely disbursement. Once the package has been approved for payment, funds will be disbursed to the Lead Grantee. The Lead Grantee is responsible for disbursing reimbursement payments to their Partners.

Tribes will not be required to sign a Limited Waiver of Sovereign Immunity to receive payments on a reimbursement basis from SGC through the CRC Program.

9.5 Project Administration

Regular Check-Ins

All Lead Grantees can expect to participate in regular check-in meetings with SGC staff and contractors. During check-in meetings, Lead Grantees can describe their work, and SGC staff can offer feedback and guidance on draft deliverables. During each check-in meeting, SGC staff will take notes on accomplishments, challenges, and lessons learned to identify emerging trends, best practices, opportunities for greater support, and success stories. SGC staff will also support Lead Grantees in meeting the various administrative criteria, developing financial and grant management processes, and building connections between Lead Grantee(s) and State and Federal agencies.

Check-in Frequency

The Lead Grantee, as the liaison between SGC staff and the Partners, will participate in check-in meetings with SGC staff and contractors, typically on a monthly basis. Partners can expect to participate in two full collaborative check-ins each grant year.

9.6 Reporting Requirements

The CRC Program requires regular and annual reporting to both meet legislative requirements and monitor grant progress. SGC will provide templates for the Progress Reports, work plan, budget, invoice form, advance payment request form, advance payment reconciliation form, and reimbursement request forms. These documents will record the Project's expenditures and assess general progress on deliverables. Lead Grantees must adhere to all reporting requirements outlined by SGC.

Lead Grantees are responsible for the following categories of reporting:

- Progress Reports
- Annual Reports (Implementation Grantees only)
- Final Reports

SGC staff will input information from these reports into two systems for collecting and reporting program and project data to meet bond act requirements and other statutory requirements: the Agency Bonds Consolidated Reporting System (ABCRS), and the Resources Agency Project Tracking and Reporting (RAPTR) System.

Progress Reports

In addition to regular check-ins, Lead Grantees will submit regular (quarterly or bimonthly) Progress Reports throughout the entire grant term, with invoice package submissions. Progress Reports will describe 1) work completed during the invoicing period and 2) deliverables completed during the invoicing period.

Lead Grantees and Partners may need to comply with additional reporting requirements to comply with Climate Bond requirements.

Annual Reports (Implementation Grantees Only) I

Implementation Grantees must submit Annual Reports on the overall status of the grant. Annual Reports contain the following:

- Annual summary report
- Equipment inventory record

- Leverage Funding Report
- Indicator tracking (evaluation) report

Detailed work plans and budgets will be updated on a regular basis. These documents will contain more detail than the Grant Agreement and will be used as administrative tracking tools between the Lead Grantee and SGC.

Annual Summary Report

Annual summary reports include high-level questions that are not captured in the Progress Reports submitted by Lead Grantees as part of the invoicing process.

Lead Grantees will be required to provide progress on specific benefits of the project.

Equipment Inventory Record

The equipment inventory record tracks all grant-funded equipment and supplies costing more than $5,000 or that are prone to theft, loss, and misuse (e.g., computers, printers, smartphones, tablets, camera, etc.). It will track information such as equipment type, quantity, cost, and identifying information (serial number, registration).

Leverage Funding Report

Lead Grantees utilizing leverage funding will be required to complete a Leverage Funding Report to track funding provided by other sources for expenditures on CRC deliverables. This report captures amount, source, and use of all leverage funding.

Indicator Tracking (Evaluation) Report

Implementation Lead Grantees are required to report annually on, at minimum, indicators and data requests that will contribute to the final Evaluation Phase. (See *Section 9.7 Implementation Grant Evaluation)*

Final Reports

Lead Grantees are required to submit a Final Report prior to close out of the grant term. For Planning Lead Grantees, the Final Report is due at the end of the grant term. For Implementation Lead Grantees, the Final Report is due at the end of the Implementation Phase. The Final Report includes high-level questions regarding successes, barriers, and lessons learned for the entire Project.

Implementation Lead Grantees must also submit the Equipment Inventory Record, Leverage Funding Report, and Indicator Tracking (Evaluation) Report. If relevant, Planning Lead Grantees are also required to submit an Equipment Inventory Record and a Leverage Funding Report at the end of their grant term.

9.7 Implementation Grant Evaluation Ⓘ

Implementation Lead Grantees must provide project-related data during the Evaluation Phase. In partnership with SGC staff, the Lead Grantee will use an existing program evaluation framework and identify indicators for tracking and monitoring for their Project.

The evaluation will gather specific, measurable outcomes achieved by the program that will inform lessons learned and potential recommendations for overall program improvement and insights for future CRC funding rounds, as well as related climate resilience and community resilience funding opportunities. Given CRC Program design and objectives, the CRC Program will closely assess ability to serve priority communities statewide and priority populations at the neighborhood-scale. SGC staff will ensure the CRC Program only collects and shares information and data as appropriate, while respecting confidentiality and sensitivity of demographic information.

The CRC Program may provide technical assistance to support grantees on some reporting, administrative, and communications activities as appropriate. At minimum, CRC Program outcomes and evaluation will be reported to SGC staff, SGC Council, and the Legislature.

The program evaluation will consider, at minimum:

- **Impact on Climate Resilience**: Lead Grantees will collect and report on data that will allow them to assess how the CRC Project, space, and resources strengthen local resilience to climate change impacts. This will include a wide range of applicable climate change impacts, including drought, floods, extreme heat, sea level rise, and wildfires. The evaluation will assess the efficacy of the CRC Project, space, and resources at preparing for, responding to, and recovering from climate impacts, through both the capital projects included (such as structure hardening, energy backup systems, or transit vehicles used to bring people to the CRC during disasters), as well as programs and services (such as food and water distribution during and after a climate disaster).
- **Impact on Community Resilience:** Lead Grantees will collect data that will allow them to assess how the CRC Project, space, and resources impact community resilience and meaningfully support vulnerable residents. This may include, but is not limited to, information on social cohesion, health impacts, well-being, economic opportunities, and civic engagement and participation.
- **Impact on Priority Communities:** Lead Grantees will collect and report on data that showcases a direct, tangible, and substantial benefit to vulnerable populations that would not have occurred without the CRC Project. This may include, but is not limited to, information on enhancing vulnerable population's resources and quality of life and directly responding to expressed needs identified through direct and sustained input. Metrics will be collected on usage of the Community Resilience Center in assessing impact of both climate resilience and community resilience. Lead Grantees will need to provide CRC Facility usage information. This may include but is not limited to how many people visit the CRC Facility, general information on county of residence, the purpose for attending, and the resource utilized. Usage data will examine CRC Facility usage year-round, as well as

during disruptions and disasters such as drought, earthquakes, extreme temperatures, flooding, sea level rise, and wildfires.

Confidentiality of Tribal Data

During the Post-Award Consultation Process/Pre-Development Phase, SGC will work with each awarded Tribe and their Evaluator to reach a mutually agreeable evaluation plan that protects confidentiality of Tribal data and Traditional Ecological Knowledge while also meeting SGC program evaluation goals. This may include modification of indicator and deliverable requirements.

9.8 Monitoring I

Performance

SGC has sole discretion to determine if Grantee is performing in accordance with the Grant Agreement. Non-performance issues can include but are not limited to:

- Misuse of funding for ineligible expenses
- Use of CRC funds to supplant other committed funds (leverage funding)
- Inability to meet performance requirements or scheduled milestones
- Failure to complete or failure to make a good faith effort to complete the CRC Project as a whole or any CRC Project Components
- Failure to comply with the Program Guidelines, terms and conditions of the Grant Agreement, or policies of the CRC Program and/or SGC.

SGC will notify the Lead Grantee, in writing, if non-performance is determined, and will provide instructions and a timeline to rectify all cases of non-performance. Lead Grantee must respond to a determination of non-performance within 30 days either by acting on corrective actions and notifying SGC of actions taken, or disputing SGC’s findings in writing. SGC, without waiver of other rights or remedies, may require the Grantee to re-perform any actions defined in the Grant Agreement if determined to be not performed in accordance with the Grant Agreement.

SGC may withhold any payments due to Lead Grantee until the Lead Grantee brings the individual project or CRC Project back into full compliance. Costs and expenses for these actions shall be borne by the applicable Lead Grantee, Partner, or contractor.

SGC has the right to issue a Stop Work Order for any component of the grant and suspend payments to the Lead Grantee. If applicable, SGC reserves the right to issue a Stop Work Order if there is a breach in the leverage funding commitments that put components of the Project at risk of not being completed.

Both SGC and the Lead Grantee have the right to terminate the Grant Agreement throughout the grant term upon 30 calendar days of written notice. The written notice shall specify the reason for early termination and may permit SGC or the Lead Grantee to rectify any deficiencies prior to the termination date.

9.9 Prevailing Wage Requirements

CRC-funded Projects may be subject to State Prevailing Wage Requirements, pursuant to Section 1700 of the California Labor Code. The California Labor Code requires payment of local prevailing wages to workers and laborers on state government contracts in excess of $1,000 for public works projects. A “public work” is the construction, alteration, demolition, installation, repair or maintenance work done under contract and paid for in whole or in part out of public funds. The definition applies to private contracts when certain conditions exist. Lead Grantees can identify additional stipulations and exceptions under Cal. Labor Code § 1720 et seq.

The Lead Grantee must meet the following requirements for “public work” activities under this Grant Agreement:

- Prevailing wages are paid
- Project budget and invoices for labor reflect prevailing wage requirements, or if exempt, provide the applicable exemption to SGC with the Project budget
- Project complies with all other requirements of Prevailing Wage law, including but not limited to, keeping accurate payroll records, and complying with all working hour requirements and apprenticeship obligations

Lead Grantee shall ensure that its Partners and contractors, if any, also comply with Prevailing Wage requirements. Grantee shall ensure that all agreements with its Partners and contractors to perform work related to this Project contain the above terms regarding payment of prevailing wages on public works projects.

The Department of Industrial Relations (DIR) is the primary resource for consultation on the requirements of California Prevailing Wage law.

- Lead Grantee can register as the project owner and identify the rates for prevailing wages on the DIR website[10] and Lead Grantee may contact DIR for a list of covered trades and the applicable prevailing wage.
- If Lead Grantee is unsure whether the CRC Project or individual projects receiving this grant award is a “public work” as defined in the California Labor Code, it may wish to seek a timely determination from the DIR or an appropriate court.
- If Grantee has questions about this contractual requirement, recordkeeping, apprenticeship, or other significant requirements of California Prevailing Wage law, it is recommended the Lead Grantee consult DIR and/or a qualified labor attorney.

[10] California Department of Industrial Relations, July 2018. http://www.dir.ca.gov

9.10 Ownership

The following section outlines the long-term governing principles for ownership of Project elements funded by the CRC grant.

If the ownership or use of equipment, vehicles, or infrastructure changes to a use not in accordance with the CRC Program Guidelines or Grant Agreement, the Grantee may be required to reimburse the State in a manner determined by SGC.

Equipment

For any equipment purchased or built with funds that are reimbursable as a direct cost of the CRC Project, as determined by SGC, the Lead Grantee, Partner, or contractor, as applicable, must be the sole owner on the title. During the Implementation Phase, equipment must be dedicated to the described use in the same proportion and scope as was in the Grant Agreement, unless SGC agrees otherwise in writing. On completion or early termination of the Grant Agreement, the State will either require that the equipment be returned or authorize the continued use of such equipment at the Project Area. In making that determination, the State will consider the useful life of the equipment, and the Grantee may be required to refund the State for the fair market value of equipment that continues to have a usable life but is no longer required for grant implementation. SGC may, at its discretion, authorize that the equipment be donated to a charitable organization in the community in which the Project Area is located. Lead Grantee will be required to maintain an inventory record for each piece of non-expendable equipment purchased or built with funds provided under the terms of a Grant Agreement.

Vehicles

For any vehicles acquired with funds that are reimbursable as a direct cost of the CRC Project, the Lead Grantee or Project/Plan Lead, as applicable, must be the sole owner on title. Vehicles acquired—including, but not limited to, bicycles, cars, buses, vans, rail passenger equipment—must be maintained in a state of good repair and dedicated to the described use in the same proportion and scope as outlined in the Grant Agreement, unless SGC agrees otherwise in writing.

Infrastructure

For any rights of way, real and personal property, leases, improvements and infrastructure funded as a reimbursable direct cost of the CRC Project, the Lead Grantee, Partner, or an appropriate public agency, as applicable, must be the sole owner of the title or leasehold.

Capital projects owned or operated by public entities must include the public agency on the application or include an executed agreement with that public agency for the completion of the Community Resilience Center upgrades for which funding is sought before the Grant Agreement is signed.

9.11 Publicity Requirements

Lead Grantees are encouraged to use SGC names and/or logo for all publications, websites, signage, invitations, and other media-related and public-outreach products related to the CRC grant.

Lead Grantees and Partners are required to adhere to the Climate Bond publicity requirements detailed in the Grant Agreement under the CRC Publicity Guidelines attachment.

9.12 Audit and Record Retention

All records, physical and electronic, must be adequately protected from loss, damage, or destruction for possible audit(s). The Lead Grantee agrees that the State or designated representative will have the right during normal business hours to review and to copy any records and supporting documentation pertaining to the performance of the Grant Agreement and interview any employees who might reasonably have information related to such records.

Further, Lead Grantee agrees to include a similar right of the State to audit records and interview staff of any Partners and Contractors related to performance of the Grant Agreement.

- Lead Grantee, Partners, and Contractors must maintain copies of Project records four years after all terms of the Grant Agreement are fulfilled, unless a longer period of records retention is stipulated.
- The State retains the right to conduct an audit each year during the grant term and up to four years after all terms under the Grant Agreement are fulfilled.
- The State may require recovery of payment from the Lead Grantee, issue a Stop Work Order, or terminate the Grant Agreement, as warranted, based on an audit finding, or any other remedies available in law or equity.

The Lead Grantee agrees to include a similar right of the State to audit records and interview staff in any contract related to performance of this Grant Agreement.

Section 10: Technical Assistance

Summary of Section 10

Technical assistance (TA) will be available to eligible applicants and Lead Grantees and Partners to support the following grant phases:

- Application Period
- Post-Award Consultation Process
- Pre-Development Phase
- Implementation Phase
- Evaluation Phase

SGC will prioritize Tribal applicants for technical assistance. See the SGC tools webpage for additional resources including SGC's model hub, technical resource kit, and other resources.[11]

Figure 2 below summarizes technical assistance offered in Round 2: Application Technical Assistance to support applicants during application development, and Pre-Development/ Implementation Technical Assistance to support awarded Lead Grantees.

Figure 2: CRC Implementation Grant Technical Assistance Timeline

10.1 Application Technical Assistance

To support the development of competitive applications, SGC will offer Application Technical Assistance (TA) from a third-party provider (TA providers) to eligible applicants for the CRC Implementation and Planning Grants. **Receiving third-party Application Technical Assistance during the Application Period does not guarantee that an applicant will be awarded a grant.**

Eligible applicants may request free third-party Application Technical Assistance by completing the Technical Assistance Request Form available on the CRC application webpage at

[11] Strategic Growth Council Tools, available at: https://sgc.ca.gov/tools/

California Strategic Growth Council

https://sgc.ca.gov/grant-programs/crc/application/. Lead Applicants eligible for Application Technical Assistance include:

1. **Tribal applicants:** SGC will prioritize Tribal applicants for technical assistance. (See *Section 2: California Native American Tribes and Tribal Applicants* and *Appendix A: Terms and Definitions*)
2. **Other applicants:** If available, remaining TA resources will be provided to organizations in the following order and on a first-come, first-served basis.
   - Lead applicants that are nonprofits whose missions are primarily focused on serving Tribal communities and the grant activities are primarily focused on serving Tribal communities.
   - Lead applicants that are nonprofits in rural communities or unincorporated communities and that meet the definition of an under-resourced community.

Third-party Application Technical Assistance activities may include, but are not limited to:

- Direct application assistance, including review of narrative question responses and application coordination
- Financial analysis and budget development
- Identification of Planning or Project Area, integration of projects, and cost estimates.
- Assessment of project readiness
- Assistance developing draft Community Engagement Plans, CRC Emergency Plans, and Community Resilience Plans

Third-party Application Technical Assistance is not guaranteed and is subject to availability. However, SGC staff will provide general Application Technical Assistance to all applicants by offering application webinars and distributing supportive materials as needed which may include recorded videos, samples, or other written materials. Additionally, all applicants may submit questions regarding guidelines and application materials to CRC Program staff at CRC@sgc.ca.gov.

Post-Award Consultation Process Technical Assistance

All applicants selected for awards will be required to participate in a Post-Award Consultation (PAC) Process prior to finalizing the Grant Agreement. During the PAC Process, CRC Program staff and TA Providers will assist the awardee and Partners to refine their scope of work and complete all documentation necessary to comply with administrative, statutory, and program requirements.

Failure to complete the review and to sign the Grant Agreement may result in the award returning to the Council. (See *Appendix K: Post-Award Consultation Process and Polices – Planning Grants* and *Appendix L: Post-Award Consultation Process and Policies - Implementation Grants*)

10.2 Pre-Development Phase Technical Assistance

During the Pre-Development Phase, SGC will provide Pre-Development Technical Assistance (TA) to Lead Grantees who have been awarded an Implementation Grant. TA intends to support the Lead Grantee as they work towards meeting all Pre-Development Phase requirements. TA providers will provide limited technical support and guidance in the following areas:

- Setting up grant management systems and procedures
- Developing detailed work plans and budgets for the Implementation Phase
- Development of a Site-Specific Evaluation and Indicator Tracking Plan to assess the holistic impacts of the CRC Project (see *Section 9.7 Implementation Grant Evaluation*
- Meeting all other Pre-Development Requirements (*See Section 7.1 Program Requirements*)

10.3 Implementation Technical Assistance

Planning Grant and Implementation Grant awardees may receive Implementation Technical Assistance and other technical support from representatives of SGC and other State entities throughout the implementation of their CRC Project.

Depending on available funding, SGC may fund third-party technical assistance for Implementation Grantees and will prioritize Tribal Lead Grantees who receive Implementation Grants.

Implementation Technical Assistance activities may include, but are not limited to:

- Assistance in implementing the project including feedback on community engagement activities and the Collaborative Governance Agreement
- Assistance in strengthening organizational capacity such as assistance with project management systems, fiscal management, and procurement
- Feedback on relevant plans

10.4 Evaluation Technical Assistance

Lead Applicants awarded Implementation Grants must allocate 3% of awarded grant funds towards Evaluation data collection and indicator tracking. If available, Evaluators may support the Lead Grantee with tracking and documenting the CRC Project's progress and impact through the following:

- Development of reporting tools and a technical assistance plan to support the Lead Grantee and Partners with gathering and reporting of data
- Assistance with processing of data and delivering required Annual Reports to SGC
- Participation in evaluation activities such as focus groups, surveys, and interviews
- Annual case studies to communicate CRC Project stories with the public and external interested parties
- Annual Process Evaluation Memos providing feedback on the CRC Program design and implementation process

- Annual presentation of findings
- Annual Reports on the CRC Project

As noted above, Evaluators may support Lead Grantees with meeting CRC Program reporting requirements; for more information, please see *Section 9.6 Reporting Requirements*. Reporting is required during key stages of the grant cycle, including:

- Annual Reports for Implementation Grants
- Final Reports during the Evaluation Phase

Section 11: Appendices

Appendix A: Terms and Definitions

Access and Functional Needs (AFN): Term referring to individuals who are or have: physical, developmental, or intellectual disabilities; chronic conditions or injuries; limited English proficiency; older adults; children; low-income, homeless, and/or transportation disadvantaged or public transit-dependent; and pregnant people as defined by the California Governor's Office of Emergency Services. For the CRC Program, described as "Priority Populations."

Activate: For the CRC Program, "activate" refers to the mobilization of CRC Facilities, services and programs, emergency plans, and/or personnel needed to respond for an emergency event. This is distinct from "blue sky" conditions or year-round services and programs. Activation details will vary based on specific facility capabilities, the type of emergency, and needs of the community and priority populations.

Adaptive Capacity: The ability of systems, institutions, humans, and other organisms to adjust to potential damage, take advantage of opportunities, or respond to consequences. Vulnerable communities have less adaptive capacity to cope with, adapt to, and recover from climate impacts. Adaptive capacity can be assessed by using publicly accessible tools.

Administration Costs: Administration Costs are costs associated with the planning and management of the grant, as well as costs associated with reporting and capacity building to ensure compliance with the Grant Agreement.

Advance payment: Any payment made to a contractor before work has been performed or goods have been delivered. Advance payments are permitted only if authorized by statute, as defined California Department of General Services (DGS)'s State Contracts Manual, Volume I. (For example, interagency agreements may provide for advance payments under (GC § 11257.)

Applicants: The Lead Applicant and Partners are collectively referred to as "Applicants."

Application: A submittal comprised of responses and supporting documents to apply for the grant.

Application Workbook: An Excel file that includes a descriptive work plan and budget with clear timelines, activities' line-item costs, cost categories, funding sources, and deliverables, broken down by Grant Phase. This document will provide the basis for the scope of work adapted into the Grant Agreement. The document template will be provided by SGC.

Awarded: The California Strategic Growth Council has voted to make an award to an applicant and commits funding to the proposed project(s).

California Native American Tribe: A "California Native American Tribe" is a federally recognized Native American Tribe or a non-federally recognized Native American Tribe listed on the California

Tribal Consultation List maintained by the Native American Heritage Commission on February 19, 2026).

Campus Amenities: Activities related to construction or improvements to amenities at or based in the CRC Facility that strengthen the community's resilience to climate and other disasters, such as a microgrid or shade trees located on site at the resilience center.

Capacity building: The process of strengthening local coordination, leadership, knowledge, skills, expertise, and access to resources in vulnerable communities to help to develop or increase the ability of that community to independently compete for grants and implement projects in the future. Capacity building activities include, but are not limited to, identifying and planning for needed climate change mitigation and adaptation projects in a given region and identifying the tools and resources needed to successfully access, apply for, and receive grant funding.

Capital projects: Physical improvements to the CRC Facility, Campus Amenities, or Partner Sites. Inclusive of site preparation, construction, and retrofits.

Climate adaptation: Adaptation to climate change refers to adjustment in natural or human systems in response to actual or expected climatic stimuli or their effects, which moderates harm or exploits beneficial opportunities.[12]

Climate resilience: Resilience as it relates to climate change is the capacity of any entity—an individual, a community, an organization, or a natural system—to prepare for disruptions, recover from shocks and stresses, and adapt and grow from a disruptive experience. For the CRC Program, climate resilience is strengthened locally through specific Strategies, activities, and capacity to prepare for climate impacts including drought, extreme temperatures, floods, sea level rise, and wildfires. This definition was adapted from Judith Rodin's "The Resilience Dividend: Being Strong in a World Where Things Go Wrong."

Climate vulnerability: Climate vulnerability describes the degree to which natural, built, and human systems are at risk of exposure to climate change impacts. Vulnerable communities experience heightened risk and increased sensitivity to climate change and have less capacity and fewer resources to cope with, adapt to, or recover from climate impacts. These disproportionate effects are caused by physical (built and environmental), social, political, and or economic factor(s), which are exacerbated by climate impacts. These factors include, but are not limited to, race, class, sexual orientation and identification, national origin, and income inequality, as defined by California Governor's Office of Land Use and Climate Innovation's Integrated Climate Adaptation and Resiliency Program Technical Advisory Group.

Co-Benefits: The ancillary or additional benefits of policies that are implemented with a primary goal, such as climate change mitigation—acknowledging that most policies designed to reduce greenhouse gas emissions also have other, often at least equally important, benefits (e.g., energy

[12] U.S. Environmental Protection Agency. Glossary of Climate Change Terms. https://19january2017snapshot.epa.gov/climatechange/glossary-climate-change-terms_.html

savings, economic benefits, air quality benefits, public health benefits). Also referred to as "multiple benefits" (U.S. Environmental Protection Agency).

Collaborative Governance Agreement: A Collaborative Governance Agreement is an agreement between two (2) or more parties that is not legally binding and outlines the responsibilities of each of the parties to the agreement. This is required of all members of the Collaborative Governance Structure. The agreement will outline the operation procedures and principles to help all parties share decision-making power.

Community engagement: The process of working collaboratively with and through groups of people affiliated by geographic proximity, special interest, or similar situations to address issues affecting the well-being of those people.

Community resilience: The capacity of a community to withstand, recover, and learn from adverse events (climate or otherwise) and strengthen future response and recovery efforts. Inclusive of resources, connections and networks, cultural knowledge and information, trust and social cohesion, access and opportunities, and overall equity and well-being.

Community Resilience Plan: Plan outlining services and programs operating out of the CRC year-round to ensure ongoing usage of the CRC. Draft required in Implementation Grant application; final due by end of grant term.

Community-based organization (CBO): A public or private nonprofit organization of demonstrated effectiveness that is representative of a community or significant segments of a community and provides educational or related services to individuals in the community.

Construction: The creation of new buildings or structures, including but not limited to site preparation, excavation, foundation work, structural framing, and installation of building systems (e.g., electrical, plumbing, HVAC, etc.).

CRC Emergency Plan: Plan outlining processes and procedures that will take place at the CRC Facility during emergencies. Includes mobility, emergency communications, coordination, and agreements. Draft required in Implementation Grant application; final due by end of grant term.

CRC Facility: The building which serves as Community Resilience Center. Campus Amenities and community resilience services and programs must be connected to and based out of the CRC Facility, respectively. For applications including Partner Sites, the CRC Facility refers to the main CRC Facility that meets all required functions and features.

CRC Site: Location of the CRC Facility

Direct costs: Costs directly tied to the implementation of the Community Resilience Centers grant, including, but not limited to personnel costs, subcontracts, equipment costs, travel expenses, etc.

Disadvantaged Communities (DACs): Communities with a median household income of less than 80 percent of the area average or less than 80 percent of the statewide median household income as defined by the Climate Bond Mapping Tool. [13] For CRC Round 2, "priority communities" include but are not limited to those designated "Disadvantaged Communities."

Disaster: A serious disruption of the functioning of a community or a society at any scale due to hazardous events interacting with conditions of exposure, vulnerability and capacity, leading to one or more of the following: human, material, economic and environmental losses and impacts, as defined by the United Nations Office for Disaster Risk Reduction (UNDRR) in 2022. For CRC Round 2, "priority communities" include but are not limited to those designated "Disadvantaged Communities."

Diverse partnerships: a mix of interested groups that bring different experiences, perspectives, skills and knowledge to better represent and serve the needs of communities.

Economic resilience (community and system-level): The capacity of an economy to anticipate, withstand, and recover from a shock or disruption (e.g., natural disasters, industry downturns, economic shifts) while maintaining or restoring economic activity and employment. Common indicators include economic diversity, workforce participation and adaptability, business preparedness and health, existence of planning and recovery frameworks, existence of well-functioning infrastructure, among other things.

Encumbrance: Funds not yet spent but already appropriated for a specific purpose. A commitment of funds guaranteeing a source of payment for a specific transaction, as defined by the California Department of General Services (DGS) in its 2022 State Contracts Manual Volume I.

Feasibility: The probability of a proposed Planning grant or Implementation grant Project can be realistically completed as intended given the available resources, stakeholder support, technical capacity, timeline, and external conditions, including the likelihood the Implementation Grant applicant will reach readiness within the Pre-Development Phase (1 year) and complete the project within five years.

Fiscal agent: A legal entity with legal authority, history, and capacity to administer state funds. A Fiscal Agent can make disbursements on behalf of the applicant.

Grant Agreement: Arrangement between the State and Lead Grantee specifying the payment of funds to be used for grants by the State for the performance of specific CRC Program Objectives within a specific grant term by the Lead Grantee.

Ground disturbance activities: Construction related activities that result in the physical disturbance of soil, surface materials, or subsurface conditions for the purpose of constructing or renovating a physical structure or infrastructure.

Hazard: An event or physical condition that has the potential to cause fatalities, injuries, property damage, infrastructure damage, agricultural losses, damage to the environment, interruption of

[13] Climate Bond (Proposition 4) (S)DAC Status, available at: https://experience.arcgis.com/experience/aa723fdf521a44c9a428f1a46cd38a09/page/More-Info.

business, or other types of harm or loss, as defined by the Cal OES 2018 State Hazard Mitigation Plan (SHMP).

Hazard mitigation: Any action to reduce or eliminate the long-term risk to human life and property from hazards. The term is sometimes used in a stricter sense to mean cost-effective measures to reduce the potential for damage to a facility or facilities from a disaster event.

Implementation Costs: Capital costs for the CRC Facility and Campus Amenities, which include site preparation, basic infrastructure, retrofits, and construction costs. Basic infrastructure costs include water, wastewater, broadband, and energy infrastructure connections that will serve the CRC Facility and/or Campus Amenities.

Implementation Grant: Funding for Community Resilience Centers, including construction and retrofit of CRC Facility, Campus Amenities, and services and programs.

Implementation Phase: For Implementation grants, this period is when capital projects, and/or the construction or retrofit of a CRC Site begins; and until all CRC functions and features are satisfied. This phase can be up to 4 years. For Planning grants, this period begins as soon as the Grant Agreement is executed; and encompasses the full 2 years of the grant term. This phase is used to satisfy all program requirements and project specific deliverables.

In-language materials and activities: Materials and activities translated into relevant languages based on community residents' language needs.

Indicators: Quantitative measures, including project-related metrics that show changes in conditions over a period of time.

Indirect costs: Expenses of doing business that is of a general nature. These costs are not directly tied to the grant but are necessary for the general operation of the organization. Examples of indirect costs may include but are not limited to: personnel costs associated with administrative, supervisory, legal, and executive staff; personnel costs associated with support units, including clerical support, housekeeping, etc.; and operating expenses and equipment costs not included as part of direct Project Costs.

Joint powers authority (JPA): A government entity, formed by a formal, legal agreement, comprised of two (2) or more public agencies that share a common power and want to jointly implement programs, build facilities, or deliver services.

Lead Applicant: An entity that enters into a Partnership with other organizations for purpose of applying for a CRC grant and has been designated as the lead organization for the Partnership. Referred to as "Grantee" during the grant term, if awarded.

Lead Grantee: Designated Lead Applicant that has an agreement for grant funding with the State.

Letter of Commitment: A Letter of Commitment identifies proposed responsibilities for an organization or body and commits the organization or body to executing those responsibilities if awarded.

Letter of Support: A Letter of Support is a letter from any organization that will be involved in or impacted by the proposed grant activities. This letter states that the entity is aware and supportive of the application and would like to see the project funded.

Local Agency: Any city, county, special district, authority, or other political subdivision of the state. A subtype of a Public Agency.

Memorandum of Understanding (MOU): An MOU is an agreement between two (2) or more parties that is legally binding and outlines the responsibilities of each of the parties to the agreement. A Memorandum of Understanding is required for Implementation Grant applicants whose Project Areas cross jurisdictional boundaries.

Mitigation: An effort to reduce the loss of life and property by lessening the impact of disasters, as defined by the Federal Emergency Management Agency (FEMA).

Natural Hazard: An environmental phenomenon that has the potential to impact societies and the human environment.

Nonprofit Organization: A nonprofit corporation qualified to do business in California and qualified pursuant to subdivision (c)(3) under Section 501 of the Internal Revenue Code.

Partner: Entities other than the Grantee that enter into a Partnership with the Grantee and other organizations to apply for CRC grant and implement CRC grant activities.

Partner Site: Site managed by CRC collaborative Partners or Lead Grantee that offers programming and services that advance resilience within the community.

Plan Alignment: Plan alignment is the process of leveraging connections, information, and resources to build shared language, data foundations, and processes across multiple planning efforts at any scale. The resulting products of plan alignment are:

- A suite of plans (with different scopes and purposes) that share the same data, similar underlying assumptions, aligned visions, complementary goals, Strategies, and actions
- A shared understanding, process, and structure for multiple entities in a community or region to continue to collaborate and align efforts over the long term

Planning Area: Area containing proposed CRC Site and associated Strategies and activities. Requirement for CRC Planning Grants.

Planning Grant: Funding for planning activities to prepare a community and site for a future Community Resilience Center.

Post-Award Consultation Process (PAC Process): Prior to the execution of the Grant Agreement, a period where terms and conditions of the Grant Agreement are determined and finalized.

Pre-Development Costs: Costs to prepare and plan for the future construction (development) of a CRC and are incurred before construction begins. Pre-Development costs are part of the planning for capital projects cost category and a type of direct cost.

Pre-Development Phase: The period between grant execution and the Implementation Phase. This phase is dedicated to achieving shovel-readiness and finalizing project plans before capital project activities can begin.

Priority populations: Individuals with physical, developmental, or intellectual disabilities; individuals with chronic conditions or injuries; individuals with limited English proficiency; older adults, children, and pregnant people; and low-income, homeless, and/or transportation-disadvantaged or public transit-dependent people.

Program objectives: Statements that describe the desired outcomes of the program. CRC Implementation Grants and CRC Planning Grants each have specific program objectives. (See *Section 4.1 CRC Planning Grant Objectives* and *Section 5.1 CRC Implementation Grant Objectives*)

Program Delivery Costs: Program Delivery Costs involve costs associated with planning for and implementing the CRC Program and program requirements.

Programs and services: Programs and services that operate out of the CRC Facility that build community resilience and encourage year-round use of the CRC Facility, in addition to use during emergency activations. **Project Area**: Area containing proposed CRC Facility, Campus Amenities connected to the CRC Facility, and community resilience services and programs based out of the CRC Facility. Requirement for CRC Implementation Grants.

Project Costs: Project Costs are costs that are directly related to the planning and development of the physical CRC Project (CRC Facility, Campus Amenities, and Partner Sites). They include Pre-Development Costs and Implementation Costs.

Project/Plan Lead: The Lead Applicant or Partner responsible for leading the implementation of a specific portion of the CRC Project.

Public Agency: A local or regional agency, such as a county, city, city and county, municipal corporation, district, metropolitan planning organization, joint powers authority, regional transportation planning agency, council of government, school district, political subdivision, duly constituted governing body of an Indian reservation or rancheria, Tribally designated housing entity, or any board, commission or agency thereof, other local public agency, or entities that are legislative bodies of a local agency pursuant to Section 54952 of the California Government Code.

Publicly available, year-round: CRCs are required to be publicly available and offer year-round programs and services. This will vary based on local context. Publicly available means the CRC invites or serves the community on equal terms. CRCs activated during an emergency or climate event must ensure access to the public. Year-round offerings are the ongoing, regularly occurring (daily, weekly, monthly) services and amenities that the CRC provides to strengthen community health, well-being, social cohesion, and resilience during normal, non-emergency periods.

Tribal applicants Note: For CRCs on Tribal land, requirements for “public” should be interpreted to apply to that Tribal community and not to the public beyond that Tribal community.

Readiness: Readiness or site readiness reflects the project's preparedness to move forward with proposed implementation, including the project site and land use analysis, the facility floor plan, and the Facility Condition Assessment. If a project is **ready for implementation,** the applicant has a shovel-ready project and meets all Pre-Development Requirements.

Renovation: The improvement, upgrade, or alternation of existing buildings or structures.

Risk: The likelihood of loss of life, injury, or destruction and damage from a disaster in a given period as defined by the Federal Emergency Management Agency (FEMA).

Rural Community: A community that falls within a non-metropolitan area or an area not designated as urban by the U.S. Census Bureau. For Round 2 of the CRC Program, when the CRC Facility is located within a rural community that meets the CRC definition of an under-resourced community, the CRC application is eligible for Priority Points. Note that some communities may be in rural areas that do not qualify as 'rural' using the U.S. Census Bureau data. In these cases, applicants may appeal their non-rural designation using criteria from Health and Safety Code 50199.21 during the completeness and program threshold review phase.

Severely Disadvantaged Communities (SDACs): Communities with a median household income of less than 60 percent of the area average or less than 60 percent of the statewide median household income, as defined by the Climate Bond Mapping Tool. [14]

Shelter: A disaster-relief location that provides a roof overhead, food, water, sanitation, and support to residents in maintaining their basic living needs until they can return home. Shelters will not duplicate residents' usual standards of living whether or not they have disabilities or access and functional needs. Shelters can be identified as primary or secondary shelters, depending on accessibility, as defined by the Cal OES State of Emergency Plan (2017).

Social cohesion: Refers to the strength of relationships and a sense of solidarity between community members that comes from establishing trust, collectively working towards the common good, and creating a sense of shared belonging. An example of social cohesion includes libraries curating events, resources and services for the community. **Social Infrastructure** - refers to spaces, institutions, and systems that support connection, trust, and community life, things like parks, libraries, schools, transit, and community centers.

Soft costs: Costs that are not directly tied to construction but necessary for a project's completion such as the project planning, and specifications and estimates of items, including but not limited to: planning, engineering, architectural, and other design work, environmental impact reports and assessments, appraisals, legal expenses, and necessary easements.

Technical assistance (TA): Aid and support provided to applicants, including application and implementation TA.

Traditional Ecological Knowledge: Refers to the cumulative body of knowledge, practices, and beliefs developed by Indigenous Peoples and communities over generations through direct

[14] Climate Bond (Proposition 4) (S)DAC Status, available at: https://experience.arcgis.com/experience/aa723fdf521a44c9a428f1a46cd38a09/page/More-Info.

contact with the environment. It encompasses knowledge about the relationships between living beings (including humans) and their natural surroundings, often passed down through oral tradition, cultural practices, and lived experience.

Tribal applicant: Refers to California Native American Tribes (as defined above) and Tribally-owned nonprofits (as defined below).

Tribally-owned nonprofit: A California Native American Tribally-owned nonprofit (also referred to as a Tribally-owned nonprofit) refers to an organization exempt from taxation under Internal Revenue Code 501(c)(3) (26 U.S.C. § 501(c)(3)), a nonprofit incorporated under Tribal law, a California nonprofit public benefit corporation (Corp. Code, § 5110 et seq.), or an equivalent entity that has a majority Tribal-led board, is operated by a Tribe, and advances the Tribe's goals and priorities. The Tribe must be a California Native American Tribe as defined earlier

Under-resourced community: A community located within:

- An area identified as disadvantaged or severely disadvantaged using the Climate Bond Mapping Tool[15]; OR
- Census tracts identified as disadvantaged by the California Environmental Protection Agency via the Office of Environmental Health Hazard Assessment's CalEnviroScreen 4.0 tool (CA EPA 2021 update)[16]

For Round 2 of the CRC Program, when the CRC Facility is located within an under-resourced community, the CRC application is eligible for Priority Points.

Unincorporated community: A place located outside of an incorporated place as defined in the Climate Bond Mapping Tool[17]. For Round 2 of the CRC Program, when the CRC Facility is located within an unincorporated community that meets the CRC definition of an under-resourced community, the CRC application is eligible for Priority Points.

Vision statement: A statement developed by applicants to describe project vision and outcomes, and how proposed Strategies and/or activities will be coordinated and integrated to achieve all relevant CRC Program Objectives.

Vulnerable resident or community: Vulnerable communities or vulnerable populations are a subgroup population within a region or community that faces a disproportionally heightened risk or increased sensitivity to the impacts of climate change and that lacks adequate resources to cope with, adapt to, or recover from such impacts. Vulnerable populations often also face environmental, public health and economic burdens. Such people include but are not limited to: women; racial or ethnic groups; low-income individuals and families; individuals who are

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[15] Climate Bond (Proposition 4) (S)DAC Status, available at: https://experience.arcgis.com/experience/aa723fdf521a44c9a428f1a46cd38a09/page/More-Info.
[16] Office of Environmental Health Hazard Assessment: SB 535 Disadvantaged Communities 2022, available at: https://experience.arcgis.com/experience/1c21c53da8de48f1b946f3402fbae55c/page/SB-535-Disadvantaged-Communities
[17] Climate Bond (Proposition 4) Disadvantaged Communities Map, available at: https://experience.arcgis.com/experience/aa723fdf521a44c9a428f1a46cd38a09/page/(S)DAC-Communities-Map.

incarcerated or have been incarcerated; individuals with disabilities; individuals with mental health conditions; children; youth and young adults; seniors; immigrants and refugees; individuals who are limited English proficient (LEP); and Lesbian, Gay, Bisexual, Transgender, Queer, and Questioning (LGBTQQ) communities; or combinations of these populations. (CA Health and Safety Code Section 131019.5)

Appendix B: Collaborative Governance Requirements

Collaborative Governance Agreement

Lead Grantees must co-develop a Collaborative Governance Agreement (CGA) that includes the Lead Grantee, all Partners, residents that describes the governance, organization, and financial relationships of the Collaborative Governance Structure (CGS). The Collaborative Governance Structure will govern implementation of the entire CRC grant. Applicants may design their Collaborative Governance Structure to best align with their needs, but the final and fully executed Collaborative Governance Agreement must, at a minimum, include the following:

- Identification of the Lead Grantee and Partners
- Roles and responsibilities for the Grantee and all Partners, residents, and/or community-nominated members
- Dispute-resolution processes and governance procedures to change, add, or remove members
- Legal and financial considerations including:
  - Liability provisions
  - Financial relationships between the Lead Grantee and Partners
  - The process the Lead Grantee will use to reimburse or provide advance payment to the Partners
  - Procurement processes
- Transparent decision-making processes between Lead Grantee and Partners
- Transparent process for involving local residents and other community-based organizations (CBOs) that are not included within the formal Grant Agreement in decision-making
- Non-discrimination clause
- Meeting facilitation procedures including frequency of meetings, minimum number of meetings open to the public, means for publishing meeting agenda, and notes for public access, with consideration for location, virtual access, and language access

Note: For CRCs located on Tribal land, requirements for “public” meetings and sharing of information should be interpreted to apply to that Tribal community, not to the public beyond that community.

If Tribes are included as Lead Applicants or Partners, their sovereign status should be respected and upheld through the development of the Collaborative Governance Structure and the subsequent Agreement. The Collaborative Governance Agreement should additionally outline measures that will be taken to protect the confidentiality of Tribal data and Traditional Ecological Knowledge collected or shared as part of grant activities.

Tribal Lead Applicants may submit modifications, with justification, to one or more requirements of the Collaborative Governance Structure and/or Collaborative Governance Agreement, if the application sufficiently complies with the overall goals of these requirements. See *Collaborative Governance for Tribal applicants* for additional details.

Project Areas that Cross Multiple Jurisdictions

If the Project Area crosses multiple jurisdictions, and all relevant agencies are included as members of the Collaborative Governance Agreement, the CGA may satisfy the CRC Program's multi-jurisdictional MOU requirement. To do so, it must, at a minimum, define the following:

- Arrangement and commitment from a dedicated staff member from each public agency and/or Tribal government to provide support for the CRC project by aiding in the development and implementation of:
    - Capital projects
    - Planning activities
    - Policies for CRC emergency activation procedures; or alternatively, the CRC must be identified as a shelter resource in a county/regionally developed Emergency Operations Planning (EOP) document
- Participation in Collaborative Governance
- Systems designed to coordinate successful execution of the CRC grant and CRC Emergency Plans. For each entity, this should include the responsibilities, expectations, communication systems, staffing plans, and adequate budget.
- The public agency or Tribal government responsible for leading coordination among government entities, including resolving any challenges arising from having multiple jurisdictions contained within the Project Area. This entity may be the Lead Applicant, a Partner, an independent project manager contracted by the Lead Applicant, or another appropriate arrangement.

Partner Requirements

Planning Grants: Planning Grants require at least one Partner.

Implementation Grants: Implementation Grants require at least two Partners. At least one Partner must be a community-based organization.

A California Native American Tribe or a Tribally-owned nonprofit, as defined in *Appendix A: Terms and Definitions*, applying as a Lead Applicant is typically not required to have Partners included in the application. However, the Tribal Lead Applicant will still need Partners if the application includes other entities who will be leading aspects of the grant-funded work (such as a capital project activity in an Implementation Grant). In this case, the other entities should be included as Partners. This includes any other Tribes included in your application.

Tribes with Partners who are applying for an Implementation Grant will need a CGS that complies with all requirements described previously. (See Collaborative Governance for Tribal applicants below).

If a Planning Grant Lead Applicant does not have any Partners, there are no further Collaborative Governance requirements beyond what is included in the application.

If the Project Area for an Implementation Grant includes portions that are not under the control of federally recognized Tribes, the applicant may need to submit Letters of Commitment from each relevant public agency at the time of application and if awarded, grantees may need to execute a multi-jurisdictional MOU with the relevant jurisdictions at the end of the Pre-Development Phase. (See *Section 3.1 Eligible Applicants* and *Section 3.3 Eligible Planning and Project Areas*)

Examples of Partner Types

Lead applicants are encouraged to include a diverse representation of Partners. Potential Partners may include, but are not limited to:

- California Native American Tribes
- Tribally-owned nonprofits
- IRC 501(c)(3) tax-exempt nonprofit organization
- Workforce development groups
- Public agencies
- Special districts
- Joint powers authority
- Public utilities
- Local publicly owned utilities
- Mutual water companies
- Faith-based groups

Collaborative Governance for Tribal applicants

The CRC Program is dedicated to respecting Tribal sovereign status throughout every stage of program development and implementation. For CRCs located on Tribal land, requirements for "public" meetings and sharing of information should be interpreted to apply to that Tribal community, not to the public beyond that community.

Tribal Lead Applicant with Partners

The Collaborative Governance Structure for California Native American Tribes or Tribally-owned nonprofits should be designed to:

- Fit the unique circumstances and existing relationships of a community
- Meet the overall goals of the collaborative and promote accountability in responding to community feedback
- Be appropriate for specific dynamics within that community

Tribal Lead applicants may submit modifications to one or more requirements of the Collaborative Governance Structure and/or Collaborative Governance Agreement. The modification must include an explanation of why it is needed, and the application must sufficiently comply with the overall goals of the requirements. Requests will be considered on a case-by-case basis.

Tribal Lead Applicant without Partners

If you are a California Native American Tribe or a Tribally-owned nonprofit who is a Lead Applicant for an Implementation Grant and do not have any Partners:

- The applicant does not need to have a formal Collaborative Governance Structure or Collaborative Governance Agreement
- The applicant must complete a Collaborative Governance for Tribes Worksheet

Applicants must demonstrate they meet the intent of the Collaborative Governance, including:

- The Tribal community was informed and in support of the proposed CRC project
- The Tribal community is informed of, and involved in, grant implementation
- There is accountability to the Tribal community and transparency over grant activities
- There is a forum for individuals to provide input into grant implementation and raise concerns throughout the grant term
- There are clear roles and responsibilities for all entities and/or individuals involved in the grant (such as different Departments within a Tribe)
- There are clear decision-making and dispute resolution processes during the grant term
- Decisions are informed by Tribal community input

Tribes may choose to use existing governance structures to gather input and make decisions or create new ones. Please keep in mind that some decisions about changes in grant activities should be made quickly to allow grant activities to proceed. There can be different decision-making processes for different types of decisions.

Appendix C: Community Engagement Activities and Eligible Costs

Key considerations

Key considerations for developing a plan to engage community representatives throughout all phases of the project include, but are not limited to, the following:

Robust

Requires comprehensive strategy that aligns clearly with the overall objectives throughout every phase (design, application, implementation, and evaluation). Consider frequency, type, and depth of engagement activities.

Meaningful

Delivers clear benefits and outcomes to community members. Ideally builds local knowledge on issues, supports local priorities, and demonstrates impact of community engagement.

Culturally appropriate

Demonstrates clear understanding of community members, their communication needs and preferences, and adjusts accordingly. Translates as needed, simplifies technical language, employs mix of approaches that most effectively connects with community members.

Accessible

Any limitations to participation are acknowledged and rectified. Activities and events contain accommodations to ensure all community members can participate. Offer meetings at different times (e.g., weekends and evenings) to accommodate a variety of work schedules and commitments/responsibilities. Offer opportunities in different formats (e.g., in-person, online, hybrid) and provide childcare and/or transportation vouchers when possible. Offer seating, wheelchair access, captions, and other accommodations.

Community Engagement Requirements

CRC funds must be used to support community engagement and outreach activities that meet all the following criteria:

- Activity is directly related to the implementation of the CRC-funded grant activities.
- Activity is located within the defined CRC Planning Area for Planning Grants and Project Area for Implementation Grants.
- Activity is focused on meaningfully engaging community members located or involved within the defined CRC Planning Area for Planning Grants and Project Area for Implementation Grants.

- Activity clearly outlines methods used, and how the community input gathered will inform project design, CRC Facility and campus amenities, and/or the programs and services offered year-round at the main CRC Facility or Partner Sites.

Recommended Activities

Activities to inform community representatives and to solicit input

- Public workshops/meetings
- Door-to-door canvassing
- House meetings
- Established website and/or social media
- Distributed flyers or other printed materials
- Outreach to existing community groups
- Surveys
- Website and/or social media
- Focus Groups
- Tabling at trusted community spaces (e.g., libraries, health fairs, farmers market)
- Involvement of relevant network partners, community groups, and other interested groups

Activities to engage community representatives in development of CRC Application

- Design charrettes
- Community Working Group
- Community-based participatory research
- Participatory budgeting[18]
- Advisory body, community working group or shared decision-making body
- Community benefits agreements
- Additional activities to ensure community interested parties have an opportunity to influence the CRC application development

Activities to ensure community engagement during CRC grant term

- Public workshops/meetings
- Door-to-door canvassing
- House meetings
- Established website and/or social media
- Surveys
- Focus groups
- Sub-contract with community-based organizations to conduct outreach
- Allocate staff positions focused on community engagement
- Steering committee relating to the participatory budget established

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[18] Participatory Budgeting Project. How Participatory Budgeting Works. <https://www.participatorybudgeting.org/how-pb-works/>

- Advisory body, community working group, or shared decision-making body
- Additional activities to provide community interested parties with an opportunity to influence the implementation of CRC Project
- Multilingual engagement options, including posters, translators, newsletters, signage, etc.
- Partnering with libraries, recreation centers, and senior centers to collaborate with established programming

Eligible Community Engagement Costs

Community engagement and outreach costs include, but are not limited to:

- Materials developed for outreach events, trainings, and other grant activities including printings and mailings
- Staff time dedicated to community outreach and education
- Access to proprietary data or research materials
- Language access through translation and interpretation services for meetings and written materials
- Creating and distributing communication materials in multiple languages to further broaden engagement for future events, including printed and digital materials, radio, television, or promoted social media coverage
- Hiring professional or consultation services that aid in reaching priority populations that may be non-organized, non-English speaking, such as health clinics or farmers markets, which can aid a grantee in reaching these groups
- Educational events and training programs that develop public awareness of the CRC Projects
- T-shirts or gear for outreach staff with CRC branding
- Participant compensation for services rendered in the development of community work products and appropriately documented with deliverables such as sign-in sheets or written surveys. This is not available to members of the public otherwise compensated through the grant.
    - Examples of participant compensation may include, but is not limited to, stipends, “CRC Project Name” branded reusable merchandise (shirts, bandanas, totes, water bottles, stickers), trees (as part of volunteer tree-planting day, for example).
    - Partners may distribute stipends as checks, or as cash gift cards to allow access for residents without banking access. These must not be specific to any specific store, service or product, gas cards, etc.
    - None of these items may be provided as a “door prize” to simply draw attendance to meetings but instead must be provided as compensation for work contributed toward grant implementation.
    - Community work products and deliverables should include documentation of attendance/participation, along with documentation of the product contributed to, such as summary of community feedback, written surveys, interactive checklists to learn more about projects/plans, completion of workshop/training, canvassing volunteer logs, etc. Note that deliverable documentation will often include a

combination of these examples to demonstrate that participants contributed to a work product that supports the grant implementation.

- Compensation for employed community ambassadors, community health workers, or promotoras (type roles) who contribute to the progress of the CRC Project
- Transportation stipends and provision of transportation services for community residents, such as operating a vanpool, that increases access to community engagement activities to benefit the project and the public. Eligible events include public meetings, volunteer events, educational tours, etc.
- Event-related costs:
    - Renting a facility or venue for a specific public engagement event, especially to make the event more accessible to targeted populations.
    - Hiring a third-party facilitator to lead and facilitate community outreach and engagement events.
    - Logistical costs that are deemed necessary for successful public events, such as permits, security services, traffic control, emergency services, rental chairs/tables, etc.
    - For major milestone events related to the CRC grant: provision of emcees, cultural art performances, and other placemaking activities within reasonable cost
    - Provision of childcare services for community residents, excluding individual cash benefits (subsidies) to participants, that increases access to community engagement activities to benefit the project and public. Grantee staff time or third-party provider to provide childcare services during a public community event being held for CRC.
    - Offering children's activities during a public community event being held for CRC. Ideally these items would be reusable and used throughout the grant term including but not limited to arts and craft materials, sports equipment, board games, etc. Note that in line with general community engagement costs, childcare-related costs may not include "giveaway" items for children with CRC funding (such as stuffed animals, prizes, etc.)
    - Food and refreshments (excluding alcoholic beverages) that are determined to be an integral part of community engagement events. For example, when meetings are held during typical mealtimes (e.g., evenings), food may be offered to substitute for a meal the participant would otherwise have secured during that time.

Appendix D: Program Requirements Overview

Planning Grants Ⓟ

Application Requirements Ⓟ

Planning Grant applications require:

1. **Applicant eligibility**
    - Must include at least one Partner in addition to the Lead Applicant
    - If the Lead Applicant is a public agency, a passed formal resolution authorizing the agency to apply, accept, and execute documents (if awarded) or documentation showing a delegated authority to bind the agency
    - If the Lead Applicant is a Tribal applicant, a Letter of Authorization or Resolution must be approved by Tribal Council and provided at the time of application.
    - Planning Area address (if available) and coordinates of at least one proposed site
    - Supporting documentation confirming the proposed CRC Site has priority community status, if applicable
2. **Applicant capacity**
    - Signed Letters of Commitment from Lead Applicant and Partners as described in *Section 7.3 Applicant capacity*
    - Responses to narrative questions about Lead Applicant capacity, including management and financial capacity
    - A detailed work plan and budget (Application Workbook) that identifies the Lead Applicant or Partner responsible for leading each grant activity
3. **Community engagement**
    - Tribal notification about the project proposal
    - Responses to narrative questions that provide a summary of community engagement to date, including descriptions of type, quality, depth, methods, and previous data or work developing a Community Engagement plan
    - Draft Community Engagement Plan
4. **Collaborative Governance**
    - List of proposed initial Partners
    - Responses to narrative questions about their vision for their Collaborative Governance Structure. (See *Section 7.5 Collaborative Governance*)
5. **Site control**
    - A detailed plan documenting the ability of the Lead Applicant or Partner to gain site control no later than 90 days prior to the end of the grant term if awarded. (See *Section 7.6 Site control and readiness)*
6. Lead Applicants must provide **responses to narrative questions**, including but not limited to:

- Information on community and residents, especially priority communities, priority populations, and other vulnerable residents
- Summary of local climate hazards and resilience measures
- Summary of local community resilience, including the characteristics, policies, programs, or other factors that make the community resilient to climate impacts
- Vision Statement, that includes how the CRC Planning Grant activities will meet all CRC Planning Grant Program objectives

7. **Project financial feasibility**
    - Completed draft work plan and budget (using the Application Workbook template provided by SGC) with clear timelines, activities, line-item costs, cost categories, funding sources, and deliverables. Lead Applicants must submit sufficient documentation to support the work plan and budget.

Grant Term Requirements Ⓟ

1. **Community Engagement Plan**
    - Grantees must submit a final Community Engagement Plan (CEP) by month 6 of the grant term.
2. **Collaborative Governance Agreement**
    - Grantees must co-develop a Collaborative Governance Structure (CGS) resulting in a fully executed Collaborative Governance Agreement (CGA) by the end of year 1.
3. **Site control**
    - Grantees must demonstrate the ability to gain site control no later than 90 days prior to the end of the grant term. (See *Appendix F: Site Control*)

For additional information about application and grant-term requirements applicable to Planning Grants, please see *Section 4.3 Planning Grant Requirements*.

Implementation Grants Ⓘ

Application Requirements Ⓘ

Implementation Grant applications require:

1. **Applicant eligibility**
   - Must include at least two Partners in addition to the Lead Applicant. At least one of these Partners or the Lead Applicant must be a community-based organization and must be funded by the CRC grant.
   - If the Lead Applicant is a public agency, a passed formal resolution authorizing the agency to apply, accept, and execute documents (if awarded) or documentation showing a delegated authority to bind the agency is required.
   - If the Lead Applicant is a Tribal applicant, a Letter of Authorization or Resolution must be approved by Tribal Council and provided at the time of application.
   - Project Area address (if available) and coordinates of the CRC Site (location of the CRC Facility) and Campus Amenities, as well as the address and coordinates of Partner Sites (if relevant), are due at time of application.
   - Supporting documentation confirming priority community status, if applicable
2. **Applicant capacity**
   - A detailed work plan and budget (Application Workbook) that identifies the Lead Applicant or Partner responsible for leading each grant activity
   - Signed Letters of Commitment from Lead Applicant and Partners (See *Section 7.3 Applicant Capacity*)
   - If Lead Applicant's Project Area crosses municipal boundaries, federally recognized Tribal territory boundaries, or similarly relevant jurisdictional boundaries, they must submit a Letter of Commitment from each relevant public agency at the time of application if these jurisdictions are not represented in the CGA Worksheet. (See *Appendix I: Memorandum of Understanding (MOU) for Multiple Jurisdictions*)
   - Documentation that demonstrates the Lead Applicant's financial capacity at time of application. (For information about requirements for Tribal Applicants, see *Tribal Applicants* in Section *7.3 Applicant Capacity*)
   - Documentation that demonstrates the Lead Applicant and Partners' management capacity at time of application.
   - Responses to narrative questions about Lead Applicant and Partner capacity, including management and financial capacity. (See *Section 7.3 Applicant Capacity*)
3. **Community engagement**
   - Tribal notification about the project application
   - Prior Community Engagement Worksheet

- Responses to narrative questions that provide a summary of community engagement to date, including descriptions of type, quality, depth, methods, and previous data or work developing a Community Engagement plan
- Draft Community Engagement Plan

4. **Collaborative Governance**
    - Completed CGA Worksheet that addresses all requirements of the Collaborative Governance Agreement (See *Section 7.5 Collaborative Governance*)
    - Responses to narrative questions about the working history of Lead Applicant and Collaborative Governance Structure Partners
5. **Site control**
    - Demonstrate the ability to gain site control by the end of Pre-Development Phase, if awarded
    - Facilities owned or operated by public agencies must include the public agency as a Partner on the application or provide a Letter of Commitment from the public agency, if awarded, by the time the Grant Agreement is signed
    - Documentation of consultation with local emergency service providers about the primary CRC Facility location
    - Project Site Analysis and a Land-use Analysis
    - Draft Floor Plan for the proposed primary CRC Facility
    - For applications with existing facilities, submission of a Facility Condition Assessment is optional at time of application. (See *Section 7.6 Site Control and Readiness*)
6. **Permitting and environmental compliance**
    - Responses to narrative questions to identify all permits required to implement all components of the proposed project as described in the application work plan and budget, and they must verify the required permit(s) can be obtained before the end of the Pre-Development Phase
    - Demonstration that environmental review, necessary to comply with CEQA, is already completed or can be completed during the Pre-Development Phase if awarded
    - Information on projects' CEQA status and demonstrate that any pending environmental review will be completed during the Pre-Development Phase if awarded
7. **Project financial feasibility**
    - Completed work plan and budget (using the Application Workbook template provided by SGC) with clear timelines, activities, line-item costs, cost categories, funding sources, and deliverables. Lead Applicants must submit sufficient documentation to support the work plan and budget.
    - Draft procurement schedule and approximate timeline for construction completion (See *Section 7.8 Project Financial Feasibility*)
    - Construction cost estimates
8. **Operations and maintenance**
    - Responses to narrative questions about long-term operations and maintenance
9. **Long-term use of the CRC Facility**

- Commitment to dedicating the site's use as a community-serving facility for a minimum of 15 years after project implementation is complete
- For projects which include leased facilities, Lead Applicant must provide both a copy of the lease and a signed Letter of Commitment from the landowner giving the Lead Grantee permission access, occupy, and develop the proposed project for the full grant term, and provide long-term maintenance.

10. **Draft plans**
    - If the County in which the CRC Facility is located is not a Lead Applicant or Partner, applicants must submit a copy of their communication of a Notice of Intent to Apply to the relevant County Office of Emergency Services, or they must provide alternate documentation confirming consultation.
    - Draft CRC Emergency Plan (using the template provided by SGC) at time of application
    - Draft Community Resilience Plan (using the template provided by SGC) at time of application. (See *Section 7.9 CRC Emergency Plan and Community Resilience* Plan)
11. Lead Applicants must provide **responses to narrative questions**, including but not limited to:
    - Information on community and residents, especially priority communities, priority populations, and other vulnerable residents
    - Summary of local climate hazards and resilience measures
    - Summary of local community resilience
    - Vision statement, including how the CRC Planning activities will meet all CRC Planning Grant Program objectives
    - At least four CRC Strategies within the Project Area and how they will advance community-identified priorities, especially for priority populations and other vulnerable residents

Pre-Development Phase Requirements I

During the Pre-Development Phase, Grantees must complete and demonstrate or submit:

1. **Applicant capacity**
    - Ability to oversee, manage, and implement the CRC project
    - Financial capacity to adhere to the reimbursement processes of the CRC Program
    - Fully executed multi-jurisdictional MOU (if applicable)
2. **Community engagement**
    - Final Community Engagement Plan
3. **Collaborative Governance**
    - Fully executed Collaborative Governance Agreement, due by month 3 of the Pre-Development Phase
    - Fully executed multi-jurisdictional MOU (if applicable)
4. **Site control and readiness**
    - Site control (See *Appendix F: Site Control*)

- Final floor plan including all required CRC functions and features
- For sites with existing facilities, Facility Condition Assessment by month 6 of the Pre-Development Phase

5. **Permitting and environmental compliance**
    - Relevant permits
    - CEQA compliance/Notice of Determination
6. **Project financial feasibility**
    - Refined work plan and budget
    - Final construction cost estimates
    - Construction project schedule
    - Draft operations and maintenance Plan
7. **Required plans**
    - Evaluation and Indicator Tracking Plan
    - Amended Grant Agreement with detailed work plan and budget for implementation phase

Applicants should aim to meet the Pre-Development Phase Requirements listed in *Section 5.4 Implementation Grant Requirements* by no less than 90 days prior to the end of the Pre-Development Phase.

Implementation Phase Requirements I

1. **Programs and Services**
    - Lead Grantee and Partners must offer programs and services throughout the Implementation Phase.
2. **CRC Facility Functions and Features**
    - Lead Grantee must complete construction and meet all CRC required functions and features as outlined in *Section 5.4 Implementation Grant Requirements* for the CRC Facility.
3. **Strategies**
4. Lead Grantee must advance at least four CRC Strategies identified in their application. (*See Section5.3 Implementation Grant Strategies*)
5. **MOU/MOA with the County**
    - The Lead Grantee must submit signed Letters of Commitment or a Memorandum of Understanding/Agreement (MOU/MOA) with relevant County entities detailing emergency activation procedures or identifying the CRC as a county shelter resource by the end of the Implementation Phase. SGC staff will maintain the ability to field requests for alternative means of demonstrating compliance with this requirement. (*See Section 5.4 Implementation Grant Requirements*)
6. **Recorded deed restriction or equivalent**
    - Lead Grantee must provide SGC with a recorded deed restriction, Memorandum of Unrecorded Grant Agreement (MOUGA), or Notice of Unrecorded Grant Agreement for each site acquired or improved upon with CRC funding by the end of the second

year of the grant term; note that the grant term begins with the Pre-Development phase.

7. **Final CRC Emergency Plan**
    - A finalized CRC Emergency Plan is due 90 days prior to the end of CRC Implementation Phase.
8. **Final Community Resilience Plan**
    - Lead Grantee must submit a final CRC Community Resilience Plan not less than 90 days prior to the end of the Implementation Phase.

Implementation Grant Evaluation Phase Requirements

During the Evaluation Phase, Lead Grantees will participate in program evaluation activities as directed by the CRC Program and third-party Evaluator. Note that some of these activities may begin during the Implementation Phase in accordance with the established Evaluation and Indicator Tracking Plan.

Applicants must meet the Implementation Grant Requirements listed in *Section 5.4 Implementation Grant Requirements* no less than 90 days prior to the end of the grant term.

Appendix E: Examples of Eligible Implementation Grant Activities

Additional examples of eligible CRC activities are listed below by eligible activity category. These are intended to serve as examples of how project funds may be used and do not constitute an exhaustive list of eligible activities.

A single activity may apply to multiple eligible activity categories (CRC Facility, Campus Amenities, and programs and services). The lists below provide examples of where an activity might apply to one activity category, or multiple.

Selected activities do not have to directly correlate to a Strategy, but applicants should ensure that at least four (4) Strategies are addressed by the proposed project activities for CRC Implementation Grants. (*See Section 5.3 Implementation Grant Strategies*)

CRC Facility

- Roof upgrades
- Mold abatement
- Seismic retrofits
- Removal of architectural barriers or installation of accessibility features that maximize access for people with disabilities
- Heat-reflecting paint for roof
- Structure hardening
- Building envelope strengthening, including window and sealant upgrades
- Electric kitchen appliance replacement
- Energy-efficient washer and dryer replacement
- Water-efficient appliance upgrades (dishwashers, toilets, showerheads, etc.)
- HVAC system replacement
- Filtration upgrades to existing heating, ventilation, and cooling systems
- Passive cooling retrofits and fans
- Construction of additional spaces, such as training and equipment storage spaces for Community Emergency Response Teams (CERT), or a computer lab
- Private or quiet spaces/rooms (various needs, including nursing, prayer, and more)
- Emergency equipment such as cots, emergency food and water
- General building equipment such as chairs, computers, projector

CRC Facility and Campus Upgrades

- Land acquisition
- Solar installation
- Connection to wastewater services
- Broadband connection or installation

- Installation of critical communications services and associated upgrades
- Outdoor cooling solutions
- Islanded microgrids with renewable energy generation and storage
- Backup power and fuel-switching
- Indoor and outdoor air monitors
- Commercial kitchen installation
- Broadcasting equipment
- Mural installation
- Stormwater capture
- Low-Impact Development (LID) measures for managing stormwater runoff (rain gardens, vegetated swales, permeable paving, etc.)

Campus Amenities I

- Lawn replacement with water-wise landscape
- Drought-tolerant landscaping
- Outdoor shelter space for pets/tents/trailers etc.
- Shade tree planting
- Permeable surface installation
- Vegetation management
- Community garden construction and localized food production
- Community art gallery
- Playground
- Compost generation and use
- Park/green space development
- Electric vehicle (EV) charging infrastructure that is accessible to people who use mobility devices and people with other disabilities.
- EV fleet based at CRC
- EV carshare purchased and housed at CRC parking lot
- Battery storage
- Charging stations for medical devices (power wheelchairs and other assisted devices and technology
- Mobile clinic housed at CRC
- Mobile units and shuttles for Access and Functional Needs (AFN) communities, especially seniors, people with disabilities, and transit-dependent community members
- Construction of bus stop on site or adjacent to CRC campus
- Public transit service extension to CRC campus
- Closing gaps in bike and pedestrian network within one (1) mile of CRC (bike lanes, sidewalks)
- Space and resources for pet relief
- Fitness center or area

Programs and Services

Health and Well-being

- Community vaccine clinic operating out of CRC and mobile clinic
- Trauma-informed care and harm reduction, and/or provider training
- Behavioral health programming
- Community health worker programs, case management, peer support, or other forms of service navigation and support programs
- Community-based participatory research
- Wellness and mental health care programs
- N95 mask distribution
- Education on heatstroke and extreme heat-related illnesses
- Programs tracking indoor and outdoor air quality, asthma, and public health impacts
- Education on hypothermia and frostbite
- Food, water, clothes, hygiene supplies, and temporary shelter distribution to community members
- Food processing and storage
- Cooking and gardening classes and continuity resources
- Agricultural and healthy food educational and access opportunities for community members
- Physical activity or other recreational resources, sites, or classes

Emergency Preparedness and Response

- Community-led emergency management, response, and recovery planning and functions
- Childcare services for essential workers and first responders during short-term emergency response
- Post-disaster recovery resources and assistance, such as Local Assistance Centers or Family Assistance Centers
- Disaster preparedness kit distribution to community members
- Community-led disaster and evacuation planning and education
- Wildfire management trainings
- CERT trainings
- CPR training
- First aid training
- Home evacuation checklist

Access and Mobility

- Electric vehicles carshare program operations, for carshare located at CRC
- Paratransit service operations to and from CRC
- Vanpool operations for vanpools to and from CRC
- Bike and/or electric bike-share program operations and training

Information Distribution

- Pamphlets and multimedia communications distribution on how to stay healthy during poor air quality and extreme heat days
- Flyer distribution on energy rebate programs
- Creation and distribution of in-language pamphlets and accessible multimedia communications on extreme heat and other climate emergencies
- Language access/alternative communication materials (audible resources, pictorial signage, etc.)
- Rainwater capture workshops

Housing Affordability and Protection

- Case management and enrollment of community members in weatherization assistance programs
- Trainings and resources on how to maintain defensible space around homes in wildfire-prone areas

Workforce Development

- Establishing and/or supporting a Workforce Resource Center in the Project Area to facilitate recruitment for workforce training programs and supportive services to trainees.
- Capacity-building for Project Area firms to establish high road practices and meet public contracting requirements
- Regional labor market analysis to support workforce planning and just transitions
- Employer engagement and coordination to ensure high quality job creation and job placement
- Pre-apprenticeship programs that utilize industry standard developed curriculum and are tied to certified apprenticeships
- Training programs that reduce barriers for and reflect the range of employment readiness needs of local residents with employment barriers (e.g., cohort based, provide case management and other job readiness services, adopt an earn-and-learn model)
- Partnerships with local workforce development boards, local nonprofits, and other organizations with knowledge of the employment landscape that ensure the training will lead to industry-recognized credentials and labor market advancement
- Partnerships for comprehensive, regional economic and workforce planning to support the transition away from fossil fuels and fossil fuel-based industries

Social Cohesion and Civic Engagement

- Arts and culture programming that focuses on building social cohesion
- Conflict resolution and de-escalation workshops
- Mutual aid programs and services
- Youth civic engagement trainings
- Spaces for community art

- Resource distribution hub, including demos or classes about how to sign up for social/health wrap-around services
- Intergenerational programming
- Cultural programming

Appendix F: Site Control

During the Application Period, the Lead Applicant and Partners are collectively referred to as "Applicants." Once an award has been made and a grant agreement executed, applicants are referred to as "Lead Grantee" and "Partners."

"Site control" means the Lead Grantee, or the Lead Grantee and Partner, has control of property. Specific details about site control will be determined during the post award and grant agreement execution process. Site control can be demonstrated through one or more of the following:

1. Fee title
2. A leasehold interest on the property with provisions that enable the lessee to make improvements on and encumber the property provided that the terms and conditions of any proposed lease shall permit, before the end of the pre-development phase for Implementation Grants
3. An option contract from the property owner to sell or lease the property upon completion of the Pre-Development Phase of an awarded Implementation Grant. The option contract shall extend for a period sufficient to demonstrate that Lead Grantee or Partner can meet site control requirements for the respective grant type as outlined in the Round 2 Program Guidelines. (See *Section 7.6 Site Control and Readiness*) The option contract should include the following:
    - Location, estimated dates, and work to be done
    - Acknowledgement of the CRC Program's 15-year dedicated use term
    - Acknowledgement of the Lead Grantee or Partner's right to substantial renovation or construction
    - Acknowledgement of compliance with all program requirements
4. A legally enforceable Letter of Commitment from the property owner to sell or lease the property upon completion of the Pre-Development Phase of an awarded Implementation Grant. The legally enforceable Letter of Commitment shall extend for a period sufficient to demonstrate that Lead Grantee or Partner can meet site control requirements for the respective grant type as outlined in the Round 2 Program Guidelines. (See *Section 7.6 Site Control and Readiness*) The legally enforceable Letter of Commitment should include the following:
    - Location, estimated dates, and work to be done
    - Acknowledgement of the CRC Program's 15-year dedicated use term
    - Acknowledgement of the Lead Grantee or Partner's right to substantial renovation or construction
    - Acknowledgement of compliance with all program requirements
5. A legally binding access agreement detailing the location, estimated dates, and work to be done. The access agreement must include the following:
    - Acknowledgement of the Lead Grantee or Partner's right to substantial renovation or construction
    - Acknowledgement of compliance with all program requirements
6. An executed disposition and development agreement, right of way, or irrevocable offer of dedication to a public agency

7. An executed encroachment permit for construction of improvements or facilities within the public right of way or on public land
8. An executed agreement with a public agency that gives the Lead Grantee or Partner exclusive rights to negotiate with the agency for the acquisition of the site; provided that the major terms of the acquisition have been agreed to by all parties
9. A land sales contract or enforceable agreement for acquisition of the property
10. Other forms of site control that give SGC assurance (equivalent to 1-7 above) that the Lead Grantee or Partner has the legal right to occupy and develop the property to comply with program requirements, and will be able to complete the Project in a timely manner and in accordance with all the requirements of the CRC Program.[19]

In the event that site control is achieved and demonstrated through a Partner in lieu of the Lead Grantee, Lead Grantee and Partner must enter into a legally binding agreement to ensure Lead Grantee has access to and oversight of the subject property as required to meet CRC grant requirements and carry out required grant activities. The agreement should ensure the Lead Grantee has available remedies or recourse should issues arise with site control or site access, and it must include the following:

- Acknowledgement of the CRC Program's 15-year dedicated use term
- Identification of the roles and responsibilities of Lead Grantee and Partner(s) as to the site
- Acknowledgement of the Lead Grantee's right to substantial renovation or construction at the site
- Details governing site access, including location(s), estimated dates and times of access, methods of access, etc.
- Process for addressing conflicts related to site control or access
- Methods of compelling compliance with or enforcing agreements (or other forms of documentation demonstrating site control) in the event of a conflict or breach
- Acknowledgement of compliance with all program requirements

Planning Grants Ⓟ

Lead Grantees must demonstrate the *ability* to gain site control no later than 90 days prior to the end of the grant term. Lead Grantees and/or Partners may demonstrate the *ability* to gain site control with one of the following options:

- A signed option to lease or purchase or control the property, contingent upon receiving implementation funds through the CRC Program or leverage funding. The signed option must be equivalent to an MOU or signed agreement, including an acknowledgement between the Grantee (or a Partner) and the property owner for the Lead Grantee/Partner's access, occupancy, and development of the property in accordance with program requirements for the 15-year term.

[19] California Strategic Growth Council. 2021. *Affordable Housing and Sustainable Communities (AHSC) Program: Round 6 Guidelines.* p.p.65-66. <https://sgc.ca.gov/meetings/council/2021/docs/20210224-AHSC_Round_6_Guidelines.pdf>

- A site control plan that details proposed sites and will be used during implementation. Any of the site control methods outlined above.

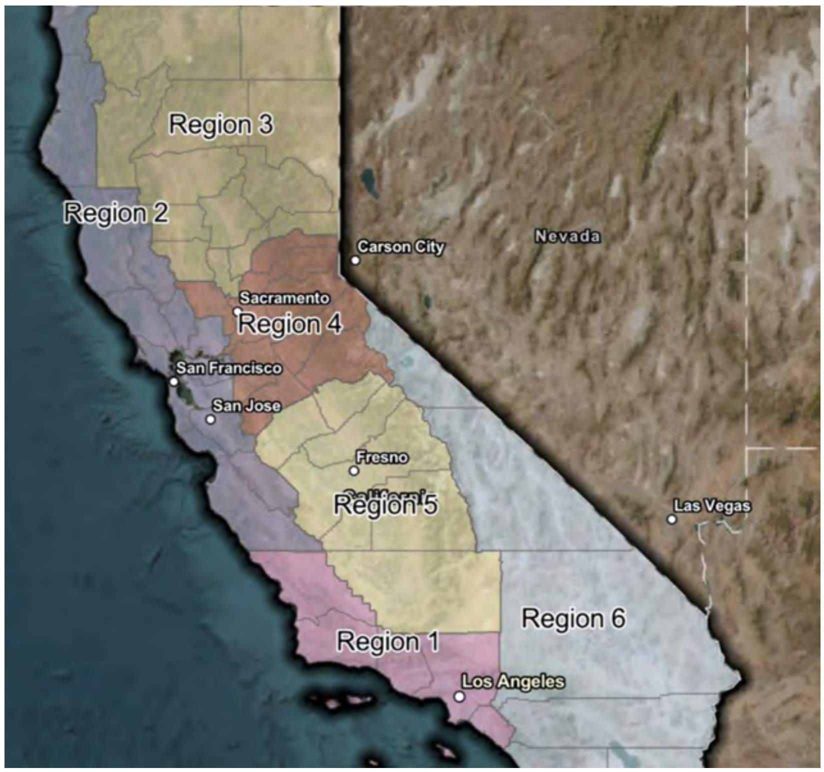
Implementation Grants I

By the end of the Pre-Development Phase, Lead Grantees must achieve site control to demonstrate readiness prior to implementation. Facilities owned or operated by public entities not included as Partners must enter into a binding agreement that demonstrates site control and allow the Grantee to complete their grant activities on the site.

Appendix G: Cal OES Fire and Rescue Mutual Aid Regions

SGC's goal is to have geographical diversity among the California Office of Emergency Services (Cal OES) Fire and Rescue Division's six mutual aid regions in the CRC Round 2 portfolio. A snapshot of the mutual aid region map from the Cal OES website[20] is below.

Figure 3: Cal OES Fire and Rescue Mutual Aid regions



Fire and Rescue Mutual Aid Regions and Associated Counties:

- **Region 1** – Los Angeles, Orange, San Luis Obispo, Santa Barbara, Ventura
- **Region 2** – Alameda, Contra Costa, Del Norte, Humboldt, Lake, Marin, Mendocino, Monterey, Napa, San Benito, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano, Sonoma
- **Region 3** – Butte, Colusa, Glenn, Lassen, Modoc, Plumas, Sierra, Siskiyou, Shasta, Sutter, Tehama, Trinity, Yuba
- **Region 4** – Alpine, Amador, Calaveras, El Dorado, Nevada, Placer, Sacramento, San Joaquin, Stanislaus, Tuolumne, Yolo

[20] OES Regional Map for Fire & Rescue, available at: https://www.caloes.ca.gov/office-of-the-director/operations/response-operations/fire-rescue/fire-operations/regions/

- **Region 5** – Kern, Fresno, Kings, Madera, Mariposa, Merced, Tulare
- **Region 6** – Imperial, Inyo, Mono, Riverside, San Bernardino, San Diego

Appendix H: Facility Condition Assessments

Lead Grantees with an Implementation Grant, whose project includes an existing facility, must provide a **Facility Condition Assessment (FCA)** within the first year of the Pre-Development Phase conducted by a licensed professional that provides an overview of:

- The current condition of building systems and structures
- Cost of repair or replacement of any building systems or structures
- Costs associated with the replacement of building components as they degrade
- The expected useful life of building systems and structures and recurring probable expenditures

In addition to a physical inspection, assessors should use background information on the property, such as environmental reports and previous maintenance records, to conduct the assessment. If the FCA is conducted before being awarded, it must have been conducted within five years of the application submission.

Facility Condition Assessments must assess, at minimum, the following:

- Health and fire safety elements including fire alarms, sprinkler systems, and building egress
- Environmental hazards such as mold, asbestos, lead, and polychlorinated biphenyls (PCBs)
- ADA compliance (applicants are encouraged to have a Certified Access Specialist (CASp) conduct the compliance evaluation for the CRC Facility).
- Seismic risk
- Compliance with any other relevant state and local building codes and regulation

Facility Condition Assessments must include, at minimum, an inspection of:

- All existing building systems such as heating, ventilation, air conditioning, plumbing, and electrical systems
- Building structures such as foundations, walls, columns, beams, and slabs
- Building exterior such as the roof, balconies, stairs, and exterior windows
- Vertical transportation such as escalators and elevators (if relevant)

If the FCA finds any building systems or structures in need of repair or replacement, applicants must include the costs for the replacement in their project budget, whether funding is being sought from SGC or has already been secured from another source.

Applicants are **strongly encouraged** to conduct a Facility Condition Assessment prior to application but may have until the Pre-Development Phase to submit their completed FCA. (See *Section 7.6 Site Control and Readiness*)

If an FCA conducted after application submittal finds building systems or structures in need of repair or replacement that have not been accounted for in the original project budget, Lead Grantees will be required to re-allocate funding from another component of their application to cover the cost of the identified repairs/replacement.

Appendix I: Memorandum of Understanding (MOU) for Multiple Jurisdictions I

Any Implementation Grant applicant whose Project Area crosses municipal boundaries, federally recognized Tribal territory boundaries, or similarly relevant jurisdictional boundaries must either:

- Include the relevant agencies or Tribal governments with jurisdictional authorities in their Collaborative Governance Structure and corresponding Collaborative Governance Agreement Worksheet; OR
- Submit Letters of Commitment from any entity who does not sign the CGA Worksheet at the time of application.

The letters must state that the agency:

- Is aware of the CRC grant application and program requirements
- Intends to sign and execute an MOU if the Application is selected for an award

The Letter of Commitment required with the final application package can be satisfied through the following mechanisms:

- A signed Collaborative Governance Agreement (CGA) Worksheet that includes all relevant agencies with jurisdictional authority (See *Section 3.2 Collaborative Governance Structure)*
- A copy of the Notice of Intent to Apply (or similar documented communication) to the relevant County(s) Office of Emergency Services that demonstrates consultation and support for the proposed CRC Site to be activated during emergencies (See *Section 5.4 Implementation Grant Requirements*)
- A Letter of Commitment used to demonstrate management capacity submitted by a Partner who has jurisdictional authority (See *Section 7.3 Applicant Capacity*)

If awarded, grantees will execute an MOU among all relevant parties prior to the **end of the Pre-Development Phase**, and before moving into the Implementation Phase. If all relevant agencies are included as members of the Collaborative Governance Agreement, the CGA may satisfy the CRC Program's multi-jurisdictional MOU requirement. SGC staff will maintain the ability to field requests for alternative means of demonstrating compliance with this requirement.

The multiple jurisdiction MOU or the CGA must comply with the terms below:

- Arrangement and commitment from a dedicated staff member from each public agency and/or Tribal government to provide support for the CRC project by aiding in the development and implementation of:
    - Capital projects
    - Planning activities
    - Policies for CRC emergency activation procedures; or alternatively, the CRC must be identified as a shelter resource in a county/regionally developed Emergency Operations Planning (EOP) document
- Participation in Collaborative Governance

- Systems designed to coordinate successful execution of the CRC grant and CRC Emergency Plans. For each entity, this should include the responsibilities, expectations, communication systems, staffing plans, and adequate budget.
- The public agency or Tribal government responsible for leading coordination among government entities, including resolving any challenges arising from having multiple jurisdictions contained within the Project Area. This entity may be the Lead Applicant, a Partner, an independent project manager contracted by the Lead Applicant, or another appropriate arrangement

Appendix J: Leverage Funding

Leverage funding is funding from non-Community Resilience Centers (CRC) Program sources which supports activities that are integrated into the overall CRC Project. Leverage funds must be spent for the purposes of the CRC project.

The CRC Program does not require leverage funds or match funds for awards. However, leverage funds will be required if the expected total project costs exceed more than 10% of the requested award amount. In this case, the Applicant must submit supporting documentation with the final application package.

Application Requirements: Applicants must demonstrate other leverage funding sources within the application budget and submit supporting documentation. CRC funds may not supplant other leverage funds for any element of the project.

Required supporting documentation includes:

1. A letter from the applicant that specifies:
    - The funding entity, funding amount, and start/end dates of all leverage funds
    - Whether funds are contingent upon the CRC grant award
    - How the funds will be used
    - This letter must reflect the finalized budget amounts for each CRC workbook project phase activities where leverage funds are utilized (for example, “$X for Pre-Development Phase items with $X from PG&E SGIP funds and $X from NMTC funds”).
2. If relevant, supporting materials that correspond to the details of the letter, including:
    - A signed letter of commitment or adopted resolution from the entity providing funds
    - A signed award letter from the entity providing funds
    - A signed executed investment from the entity providing funds
    - Other documentation that the CRC Program may deem effective

For leverage funds provided by the Lead Applicant and/or Partners which could include funds or in-kind services, a letter from the relevant entity will suffice.

At any point in the grant term, if funding gaps arise and/or leverage commitments shift, the state may request Lead Grantees to re-scope their overall project to ensure project completeness. Any new leverage funding source during the grant term is subject to the same supporting documentation requirements.

Appendix K: Post-Award Consultation Process – Planning Grants

Summary Ⓟ

Lead Applicants selected for award will be required to participate in a Post-Award Consultation Process (PAC Process) to finalize the Grant Agreement. During this PAC Process, SGC staff will assist the Lead Grantee and Partners to refine the Grant Agreement and all accompanying attachments to comply with administrative, statutory, and program requirements.

The Lead Grantee and California Strategic Growth Council (SGC) staff should finish all reviews related to the PAC Process within **six months** from the time the Council made the CRC grant award announcement. Lead Grantees will be required to meet with SGC staff and submit all required documents, such as work plans and budgets, during this period. **Failure to complete the review and to sign the Grant Agreement may result in the award going back to the Council.**

Goals for the Post-Award Consultation (PAC) Process Ⓟ

The PAC Process is intended to review the Grant Agreement terms with Lead Grantees and evaluate the current condition, feasibility, and eligibility of the awarded CRC application by:

- Gathering any additional information or details necessary for any component of the application
- Removing ineligible activities or costs
- Incorporating recommended improvements from specialists and/or the staff report

Once all parts of the CRC application are reviewed and approved, SGC staff will work with the Lead Grantee to turn the application into a scope of work. This scope will include the timeline, budget, and deliverables for the Grant Agreement.

Post-Award Consultation Process Overview Ⓟ

After the Council announces the awards, SGC staff will prepare a Grant Agreement outlining the grant terms and conditions. Then, Lead Grantees will follow these steps:

1. SGC staff will send the Grant Agreement template to the Lead Grantee. If the Lead Grantee needs any further approvals, such as council or board approvals, they should let SGC know.
2. The Lead Grantee will ask SGC staff any questions related to the general terms of the Grant Agreement. SGC staff will answer those questions and make any necessary changes to the Agreement.
3. SGC staff will review the application to make sure it follows the CRC Program Guidelines, Grant Agreement, and feedback from reviewers and program staff. SGC staff will create a

review package and ask the Lead Grantee and Partners for any extra information, documents, or application components.

4. SGC staff will set up meetings with the Lead Grantee and Partners to discuss the requested information and answer any questions.
5. Lead Grantee and Partners will send any additional information and documents to SGC staff for review.
6. SGC staff will review the new information and documents submitted. If more information is needed, they may ask for it and schedule additional meetings to clarify any issues.
7. SGC staff will finalize the scope of work, timeline, and budget, which will be included in the final Grant Agreement.
8. The Lead Grantee and Partners will review the final scope of work, timeline, and budget.
9. SGC staff will send the final Grant Agreement package to the Lead Grantee for the grant execution.
10. Lead Grantee should notify SGC if they need any additional resolution or council/board review prior to executing the Agreement.

Governing Policies and Processes Ⓟ

Any changes to the proposed work plans and budgets from the awarded application must be reviewed by SGC staff and SGC legal counsel to ensure they align with CRC Program Guidelines and the Grant Agreement.

If Lead Grantees or Partners do not update their application to meet the CRC Program Guidelines and the Grant Agreement, the PAC Process will be put on hold. SGC staff will then report this to the Council to decide what to do next.

If any part of the grant, like the work plan, budget, or Planning Area, becomes infeasible and needs to be changed after grant execution, the Lead Grantee and Partners must involve the community in the process. Any changes that could affect the original application's requirements or competitiveness will require Council approval.

CRC Program Compliance Ⓟ

If any component of the CRC grant doesn't follow CRC Program Guidelines and the Grant Agreement:

1. SGC staff will inform the Lead Grantee in writing about which specific part is not eligible, which changes are needed, and a timeline and approval process. Significant changes to the scope that would result in changes to the categories below will require approval from the CRC Program Manager:
    - Quantity of deliverables, like the number of solar panels installed, trees planted, or community bike ride events
    - Beneficiary or location of the activities
2. If the work plan doesn't meet the CRC Program Guidelines and the Grant Agreement cannot accommodate the changes proposed by SGC staff, then:

- Option 1: SGC staff may suggest moving the funds to a different cost category that is a better fit for the initial proposed scope of work. This will require written approval of the CRC Program Manager.
- Option 2: If the Lead Grantee and Partners want to create a new activity instead of moving the funds, they must submit a request to re-use the funds. SGC will review requests on a case-by-case basis. If approved, it will require written approval from SGC leadership.

Ineligible Costs and Budget Modifications Ⓟ

If the CRC application has expenses or activities that are not in compliance with the CRC Program Guidelines or Grant Agreement:

1. Ineligible costs must be removed from the proposed scope of work for CRC funding. SGC cannot provide funds for ineligible costs.
2. Ineligible costs may be moved to other eligible costs within the same cost category, up to the total amount of the original budget request, with written approval from SGC staff.
3. Ineligible costs in one cost category may be transferred to other eligible costs in another cost category with the written approval from SGC staff.
4. With written agreement from the Lead Grantee and Partners, ineligible costs associated with any cost category may be reduced or eliminated from the total amount of the original budget before signing the Grant Agreement.

Amendments and Modifications Ⓟ

After the Grant Agreement is executed, if the Lead Grantee needs to change any CRC cost category, then:

1. Lead Grantee and Partners must provide written justification for the changes.
2. Lead Grantee and Partners must propose a new plan that still aims to meet the original Project goals. Revisions require written approval from the CRC Program Manager.
3. SGC staff will review the proposal and may request more information if needed. SGC staff will communicate issues and recommendations as described in the *CRC Program compliance* section above.
4. If approved, SGC staff will send written approval to the Lead Grantee.
5. If a new plan isn't possible, parts of the original CRC Application may be removed with the written approval of the Lead Grantee, Partners, and CRC Program Manager.

Key Documentation Notes for Post-Award Consultation Process and Cost category Changes Ⓟ

Once the updated work plan and budget is reviewed and approved, SGC staff will create a simplified work plan and budget for Exhibit B of the Grant Agreement from the detailed application materials. However, the Lead Grantees and Partners must keep the final detailed Excel scope of work and budget from the PAC Process as a project management tool. This tool should be used throughout the grant term and updated regularly. If the Lead Grantee or Partner wishes to modify any grant activities after execution through an amendment or modification, they must submit the revised Excel work plan and budget for review and finalization before updating the Grant Agreement.

Appendix L: Post-Award Consultation Process – Implementation Grants

Summary

Lead Applicants selected for award will be required to participate in a Post-Award Consultation Process (PAC Process) to finalize the Grant Agreement. During this PAC process, SGC staff will assist the Lead Grantee and Partners to refine the Grant Agreement and all accompanying attachments to comply with administrative, statutory, and program requirements.

The Lead Grantee and California Strategic Growth Council (SGC) staff should finish all reviews related to the PAC Process within **six months** from the time the Council made the CRC grant award announcement. Lead Grantees will be required to meet with SGC staff and submit all required documents, such as work plans and budgets, during this period. **Failure to complete the review and to sign the Grant Agreement may result in the award going back to the Council.**

Goals for the Post-Award Consultation (PAC) Process

The PAC Process is intended to refine the work plan and budget for the Pre-Development Phase. The Lead Grantee will also review and refine the final grant agreement terms. The PAC Process will take place over the course of three to six months. Work completed during the PAC Process will include:

- Refining the scope of work, including timeline, budget, and deliverables, and developing a detailed work plan for the Pre-Development Phase
- Completing attachments to comply with administrative, statutory, and program requirements
- Revising budget to eliminate any ineligible costs
- Incorporating SGC staff recommendations to scope of work
- Approving all CRC application components

Post-Award Consultation Process Overview

After the Council announces the awards, SGC staff will prepare a Grant Agreement outlining the grant terms and conditions. Then, Lead Grantees will follow these steps:

1. SGC staff will send the Grant Agreement template to the Lead Grantee. If the Lead Grantee needs any further approvals, such as council or board approvals, they should let SGC know.
2. The Lead Grantee will ask SGC staff any questions related to the general terms of the Grant Agreement. SGC staff will answer those questions and make any necessary changes to the Agreement.

3. SGC staff will review the application to make sure it follows the CRC Program Guidelines, Grant Agreement, and feedback from reviewers and program staff. SGC staff will create a review package and ask the Lead Grantee and Partners for any extra information, documents, or application components.
4. SGC staff will set up meetings with the Lead Grantee and Partners to discuss the requested information and answer any questions.
5. Lead Grantee and Partners will send any additional information and documents to SGC staff for review.
6. SGC staff will review the new information and documents submitted. If more information is needed, they may ask for it and schedule additional meetings to clarify any issues.
7. SGC staff will finalize the scope of work, timeline, and budget, which will be included in the final Grant Agreement.
8. The Lead Grantee and Partners will review the final scope of work, timeline, and budget.
9. SGC staff will send the final Grant Agreement package to the Lead Grantee for the grant execution.
10. Lead Grantee should notify SGC if they need any additional resolution or council/board review prior to executing the Agreement.

A full guidance document on the PAC Process will be provided to Lead Grantees after award. SGC's contracting office will provide a formal notice to proceed to Lead Grantees to begin the Pre-Development Phase. Lead Grantees cannot be reimbursed for any costs incurred prior to the date of final signature.

Governing Policies & Processes

Any changes to the proposed work plans and budgets from the awarded application must be reviewed by SGC staff and SGC legal counsel to ensure they align with CRC Program Guidelines and the Grant Agreement.

If Lead Grantees or Partners do not update their application to meet the CRC Program Guidelines and the Grant Agreement, the PAC Process will be put on hold. SGC staff will then report this to the Council to decide what to do next.

If any part of the grant, like the work plan, budget, or Project Area, becomes infeasible and needs to be changed after grant execution, the Lead Grantee and Partners must involve the community in the process. This engagement should be consistent with the draft Community Engagement Plan and the Collaborative Governance Worksheet. Any changes that could affect the original application's requirements or competitiveness will require Council approval.

CRC Program Compliance

If any component of the CRC grant doesn't follow CRC Program Guidelines and the Grant Agreement:

1. SGC staff will inform the Lead Grantee in writing about which specific part is not eligible, which changes are needed, and a timeline and approval process. Significant changes to the scope that would result in changes to the categories below will require approval from the CRC Program Manager:
    - Quantity of deliverables, such as the number of solar panels installed, trees planted, community bike rides
    - Beneficiary or location of the activities
2. If the project or the work plan doesn't meet the CRC Guidelines and the Grant Agreement can't accommodate the changes proposed by SGC staff, then:
    - Option 1: SGC staff may suggest moving the funds to a different cost category that is a better fit for the initial proposed scope of work. This will require written approval of the CRC Program Manager.
    - Option 2: If the Lead Grantee and Partners want to create a new activity instead of moving the funds, they must submit a request to re-use the funds. SGC will review requests on a case-by-case basis. If staff approved, it will require written approval of SGC Leadership.

Ineligible Costs

If the CRC application includes budget line items or activities that are not eligible per the CRC Guidelines or Grant Agreement:

1. Ineligible costs must be removed from the proposed scope of work for CRC funding. SGC cannot provide grant funds for ineligible costs.
2. Ineligible costs may be moved to other eligible costs within same cost category, up to the total amount of the original budget request, with written approval of SGC staff.
3. Ineligible costs in one cost category may be transferred to other eligible costs in another cost category with written approval of the CRC Program Manager.
4. With written consent of the Lead Grantee and Partners, ineligible costs associated with any cost category may be reduced or eliminated from the total amount of the original budget before signing the Grant Agreement.

Amendments and Modifications

After the Grant Agreement is executed, if the Lead Grantee needs to change any CRC cost category, then:

1. Lead Grantee and Partners must provide written justification for the changes.
    - Lead Grantee and Partners must propose a new plan that still aims to meet the original Project goals and is supported by the Collaborative Governance Structure. Revisions require written approval of the CRC Program Manager.

- SGC staff will evaluate the proposed changes and may request more information if needed. SGC staff will communicate issues and recommendations as described in the CRC Program Compliance section above.
- If approved, SGC staff will send written approval to the Lead Grantee.

2. If a new scope of work isn't possible, parts of the original CRC application may be removed with the written approval of the Lead Grantee, Partners, and CRC Program Manager.

Key documentation and notes for Post-Award Consultation, Pre-Development Phase, and Project Changes

Once the updated work plan and budget is reviewed and approved, SGC staff will create a simplified work plan and budget for Exhibit B of the Grant Agreement from the detailed application materials. However, the Lead Grantees and Partners must retain the final detailed Excel work plan and budgets from the PAC Process as a project management tool. This tool should be used throughout the grant term and updated regularly. If the Lead Grantee or Partner wishes to modify any grant activities after execution through an amendment or modification, they must submit the revised Excel work plans and budget for review and finalization before updating the Grant Agreement.

Appendix M: Previously Funded CRC Grants by Project Type

Table 6: CRC Round 1 Planning Grant Grantees

Lead Applicant	CRC Project name	County, Cal OES Fire and Rescue Mutual Aid Region
Inland Coalition for Immigrant Justice (ICIJ)	High Desert Community Resilience Center	San Bernardino, Region 6
Mattole Restoration Council	Mattole Resilience, Education, and Research Center Project	Humboldt, Region 2
United Domestic Workers of America/AFSCME Local 3930 (UDW)	Helping At-Risk Regions Build for Organized Resilience (HARBOR)	San Diego, Region 6 Merced, Region 5
Ojai Valley Fire Safe Council	Ojai Valley Community Resilience Centers Project	Ventura, Region 1
Native Roots Network (NRN)	Əl Kulus (The Granary): A Community Resilience Center	Shasta, Region 3
City of Redding	Redding Day Resource Center	Shasta, Region 3
Community Hub de Santa Ana (formerly known as Santa Ana Building Healthy Communities)	Santa Ana Community Resilience Center	Orange, Region 1
Greenbelt Alliance	Santa Clara County Resilience Hub Collective	Santa Clara, Region 2
Fernandeño Tataviam Band of Mission Indians (FTBMI)	Pasekinga (Place of Shade) Resilience Center Network (PRCN)	Los Angeles, Region 1
Tolowa Dee-ni' Nation	K'wee-lhin'-chu Resilience Center Project	Del Norte, Region 2
Cahuilla Band of Indians	Planning for Cahuilla Community Resilience and Education Center	Riverside, Region 6

Table 7: CRC Round 1 Project Development Grant Grantees

Lead Applicant	CRC Project Name	County, Cal OES Fire and Rescue Mutual Aid Region
City of Banning	Banning Armory Community Resilience Center Project (Armory Project)	Riverside, Region 6
Community Action Partnership of Kern	Empowering Our Community: Collaborative Research for Resilience	Kern, Region 5
Little Manila Rising	Development from Destruction: Creating South Stockton Community Resiliency	San Joaquin, Region 5
California Parenting Institute (dba Child Parent Institute)	Southwest Santa Rosa/Roseland Community Resilience Hub	Sonoma, Region 2

Table 8: CRC Round 1 Implementation Grant Grantees

Lead Applicant	CRC Project Name	County, Cal OES Fire and Rescue Mutual Aid Region
St. John's Community Health (SJCH)	Avalon Health Resilience and Access Center (AHARC)	Los Angeles, Region 1
Washoe Tribe of Nevada & California	Hung A Lel Ti t'ába káŋa "Bear Cave"/ Resiliency Operations Center	Alpine, Region 4
Ramona Municipal Water District (RMWD)	Ramona Community Resilience Campus (RCRC)	San Diego, Region 6
Pogo Park	Harbour Hall – CRC	Contra Costa, Region 2
County of Nevada	Revitalizing Western Nevada County Veterans' Halls	Nevada, Region 4
Casa Familiar Inc.	La Semilla Community Resiliency Center	San Diego, Region 6
Madera County Department of Public Health	Madera County Hope Center Construction Project	Madera, Region 5

Lead Applicant	CRC Project Name	County, Cal OES Fire and Rescue Mutual Aid Region
City of Coachella	Coachella Community Resilience Center	Riverside, Region 6
Ceres Community Project	The Center for Food, Youth & Community (CFYC)	Sonoma, Region 2

Appendix N: Answers to Common Questions

What is the Community Resilience Centers (CRC) Program?

CRC is a grant program under the California Strategic Growth Council (SGC). It was established in 2021 and has awarded one round of funding to date.

In general, CRC funds Planning and Implementation Grants that advance the development of neighborhood resilience centers that provide shelter and resources during climate emergencies. In practice, this means:

- Construction and retrofit of Community Resilience Centers across California's diverse communities
- Advance communities' capacity to respond to and recover from emergencies as they build long-term resilience
- Encourages meaningful engagement, cross-sectoral collaboration, community-based partnerships, and shared governance and decision-making models
- Mitigates the public health impacts of extreme heat and other emergencies exacerbated by climate change
- Supports year-round community services and programming

I tried to apply for a grant in the past. Do I have to resubmit my application?

Yes, you must submit a new application. Please note that requirements change from round to round. Please double check Round 2 requirements before submitting materials you have used in past application cycles.

I am an individual. Can I apply for CRC? I would also like to use this grant to improve my home. Can I do that with CRC?

As an individual, you are not an eligible applicant. Please see *Section 3.1 Eligible Applicants*. These grants are also meant to transform communities, rather than be applied to specific, individual homes. Please see the eligible activities section under each grant type. (See *Section 4.2 Eligible Planning Grant Activities* and *Section 5.2 Eligible Implementation Grant Activities*) However, you may be an eligible participant of a CRC project if the grant is awarded in your area.

What is CRC doing in Round 2 to support unincorporated and Tribal communities?

You can read about the full list of improvements we have made for unincorporated and Tribal communities in the staff report.[21] In general, we have made the following improvements:

- Adding Priority Points in scoring for these communities
- Prioritizing Tribal applicants for Technical Assistance

[21] Available at https://sgc.ca.gov/grant-programs/crc/application/.

- For Tribal applicants, keeping and expanding the option to request modifications to certain requirements
- New funded Pre-Development Phase designed to ease Application burden and prepare projects for implementation

What is the process to apply for a CRC grant?

Section 8: Application and Scoring outlines which items are due during the Application Period, which items are due by the application due date (Application Requirements).

What grant types are available?

Round 2 has two grant types: Planning Grants and Implementation Grants. *Section 1.2 Program Summary* summarizes the key differences.

How do I know which grant type is the best for my organization and community?

We encourage you to use the summary of the key differences outlined in *Section 1.2 Program Summary* for a quick glance of the two grant types. Program activities should be determined through a deep understanding of your community needs. Past applicants have also considered other factors, such as financial and management capacity and the Application Requirements for each grant type.

For the CRC Program, can you apply for both a Planning Grant and an Implementation Grant?

Applicants may only apply to one grant type.

Is technical assistance available to me?

Section 10: Technical Assistance outlines Application Technical Assistance (TA). Unfortunately, resources for Application TA are limited. All California Native American Tribes and Tribally-owned nonprofits (defined in *Appendix A: Terms and Definitions*) that apply for Application TA will receive TA. If capacity and resources permit, Application TA will be opened to nonprofits that serve Tribal communities and nonprofits in rural/unincorporated, under-resourced communities on a first come, first served basis. To apply for Application TA, applicants need to complete the Application Technical Assistance Request Form released with CRC Program Guidelines.

Can more than one organization in the same jurisdiction and/or with overlapping Project Areas apply for separate CRC grants?

Yes, this is technically allowed. However, CRC values collaboration and partnerships, and so we encourage organizations to collaborate and submit one application per Project Area. As we also consider geographic diversity during final award selection, it would be unlikely that we would award more than one application in the same Project Area.

I applied and won a previous CRC grant. Can I apply again for the same grant type?

Yes, you can apply for the same grant type. However, Planning Grants are designed to prepare communities for Implementation Grants. Additionally, Implementation Grants prioritize previous

Planning and Project Development Grantees and Grantees from other SGC programs. We also consider geographic diversity. Please note that just because something is eligible does not necessarily mean it is competitive. Please see *Section 3: Eligibility* for more information on previous grantees and project eligibility.

I have turned in all the application materials. How likely is it that I will receive a grant? When will I hear back?

The CRC Program application is highly competitive. Your likelihood of receiving a grant may be impacted by a few factors, including but not limited to: community type, geographic diversity, the grant type for which you are applying, past Planning Grants, Project Development Grants, or other SGC grants, the number of applicants, how much funding applicants are requesting relative to the available funding, and more.

You can expect to hear from CRC about six months after the Application Period closes.

Will there be future rounds of CRC?

Funding is currently only available for Round 2.