



**WORKFORCE DEVELOPMENT
BOARD OF MADERA COUNTY**

A G E N D A

**February 19, 2026
3:00 p.m.**

Meeting will be held in person and via Zoom at:

Workforce Assistance Center, 2037 W. Cleveland Avenue, Madera, CA 93637

*9300 Valley Children's Place
Madera, CA 93636
30277 Avenue 12
Madera, CA 93638*

*2621 Cowden Avenue
Merced, CA 95348*

REASONABLE ACCOMMODATION FOR ANY INDIVIDUAL WITH A DISABILITY Pursuant to the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990, any individual with a disability who requires reasonable accommodation to attend or participate in a meeting or function of the Workforce Development Board of Madera County, may request assistance by contacting the Executive Assistant at Madera County Workforce Investment Corporation office, 2037 W. Cleveland Avenue, Madera, CA 93637; Telephone 559/662-4589; CRS 711; Fax 559/673-1794.

This agenda and supporting documents relating to the items on this agenda are available through the Workforce Development Board website at <http://www.maderaworkforce.org/workforce-board-meetings/>. These documents are also available at the Madera County Workforce Assistance Center – office of the Executive Director. The Workforce Development Board is an equal Opportunity Employer/Program. Auxiliary aids and services are available upon request.

1.0 Call to Order

- 1.1 Pledge of Allegiance

2.0 Additions to the Agenda

Items identified after preparation of the Agenda for which there is a need to take immediate action. Two-thirds vote required for consideration (Government Code Section 54954.2(b)(2))

3.0 Public Comment

This time is made available for comment from the public on matters within the Board's jurisdiction but not appearing on the agenda. The Board will not take action on any items presented under public comment. The comment period will be limited to 15 minutes.

4.0 Introductions and Recognitions

5.0 Adoption of Board Agenda

6.0 Consent Calendar

- 6.1 Consideration of approval of the December 18, 2025, Workforce Development Board (WDB) meeting minutes.
- 6.2 Consideration of approval of the resignation of Joe Perez, Department of Rehabilitation, from the WDB.

7.0 Action Items

- 7.1 Consideration of approval of the One Stop Operator (OSO) quarterly report for the period of October 1, 2025, through December 31, 2025.
- 7.2 Consideration of approval of the revised Supportive Services policy to include revising the daily base mileage rate from \$10 to \$15.

8.0 Information Items

- 8.1 Success Stories
- 8.2 WDB Action Planning Subcommittee Updates
- 8.3 Madera County Workforce Investment Corporation (MCWIC) Update
- 8.4 Local Business Closures
- 8.5 Federal and Legislative Updates
- 8.6 Information on James Irvine Foundation Better Careers Retreat
- 8.7 Update on PY 2024 Local Area Performance Scores
- 8.8 Program Impact Report July 1, 2025, to December 31, 2025
- 8.9 Workforce Innovation and Opportunity Act (WIOA) Formula and Special Projects Quarterly Program Overview Through December 31, 2025
- 8.10 Mountain Community and Madera County Job Fairs
- 8.11 High Performing Board Notice
- 8.12 Weekly Unemployment Insurance (UI) Initial Claims for Madera County
- 8.13 Form 700 Due April 1, 2026

9.0 Written Communication

10.0 Open Discussion/Reports/Information

- 10.1 Board Members
- 10.2 Staff

11.0 Next Meeting

April 16, 2026

12.0 Adjournment



MINUTES

December 18, 2025
3:00 p.m.

Meeting was held in person and via teleconference at:

Workforce Assistance Center, 2037 W. Cleveland Avenue, Madera, CA 93637

*9300 Valley Children's Place
Madera, CA 93636
40343 Highway 41
Oakhurst, CA 93644*

*2621 Cowden Avenue
Merced, CA 95348*

PRESENT: Aaron Chambers, Brett Frazier, Emilio Hipolito, Gurminder Sangha, Joe Perez, Kristina Gallagher, Lanie Suderman (7.1), Michelle Brunetti, Nichole Mosqueda, Robert Poythress, Todd Lile, Wendy Lomeli
ABSENT: Chuck Riojas, Donald Foster, Eric Niino, Jorge DeNava, Laura Gutile, Mike Lopez
GUEST: Kristyann Thormp, Andrew Munoz
STAFF: Jessica Roche, Maiknue Vang, Nicki Martin, Sheyla Garcia

1.0 Call to Order

Meeting called at 3:10 p.m. by Chair Brett Frazier.

1.1 Pledge of Allegiance

2.0 Additions to the Agenda

None.

3.0 Public Comment

None.

4.0 Introductions and Recognitions

Roundtable introductions were made by everyone in attendance.

5.0 Adoption of Board Agenda

Todd Lile moved to adopt the agenda, seconded by Emilio Hipolito.

Vote: Approved – unanimous

Yes: Aaron Chambers, Brett Frazier, Emilio Hipolito, Gurminder Sangha, Joe Perez, Kristina Gallagher, Michelle Brunetti, Nichole Mosqueda, Robert Poythress, Todd Lile, Wendy Lomeli

6.0 Consent Calendar

- 6.1 Consideration of approval of the October 16, 2025, Workforce Development Board (WDB) meeting minutes.**
- 6.2 Consideration of approval of the October 30, 2025, WDB Executive Committee meeting minutes.**

6.3 Consideration of approval of the November 4, 2025, WDB meeting minutes.

Rob Poythress moved to approve, seconded by Aaron Chambers.

Vote: Approved – unanimous

Yes: Aaron Chambers, Brett Frazier, Emilio Hipolito, Gurminder Sangha, Joe Perez, Kristina Gallagher, Michelle Brunetti, Nichole Mosqueda, Robert Poythress, Todd Lile, Wendy Lomeli

7.0 Action Items

7.1 Consideration of approval of the One Stop Operator (OSO) quarterly report for the period of July 1, 2025, through September 30, 2025.

Andrew Munoz, The Munoz Group, presented the first quarter OSO report to the WDB. Andrew stated that he has been impressed and happy to be working with Madera who is leading the regional OSO effort. As the OSO, he meets with Madera for a Partner meeting monthly while the other regional areas meet quarterly. Madera is in a very good position, and its co-location efforts exceed those in other areas. The OSO will hopefully facilitate better alignment, better coordination among the partners and, in the end, better services for customers being seen in the Center. The first quarter was spent meeting the partners whenever possible. Work was done on a referral system and coordinated services. Work is still being done on the Continuous Improvement Plan. A Zoom hosted information page was created. All partners have access to this page and can download materials for joint recruitment, event information, and general updates. Attendance and activities are provided within the report. Madera is on the right track to provide the highest quality services possible. A very productive meeting was held with the other 3 regional Directors so that Madera's activities can align with the rest of the region. Concerns have been expressed about the current state of Federal funding and the impacts some changes that have happened in the last 18 months could have. There is also concern whether Madera is aligned to support the economic activity that is going on within the County. The WDB's Action Plan is also used to guide some of the work being done.

Nichole Mosqueda moved to approve, seconded by Rob Poythress.

Yes: Aaron Chambers, Brett Frazier, Emilio Hipolito, Gurminder Sangha, Joe Perez, Kristina Gallagher, Lanie Suderman, Michelle Brunetti, Nichole Mosqueda, Robert Poythress, Todd Lile, Wendy Lomeli

7.2 Consideration of approval of the appointment of Laura Gutile, Laura's Nuts, to the WDB Executive Committee.

There was some movement in the membership of the Executive Committee due to the WDB's action planning. Omair Javaid, formerly the WDB Vice Chair, resigned from the Board. Nichole Mosqueda is the acting Vice Chair and has replaced Omair on the Executive Committee. Laura will fill a vacant Private Sector seat on the Committee, and she has stated that she is honored to serve on the Committee.

Vote: Approved – unanimous

Yes: Aaron Chambers, Brett Frazier, Emilio Hipolito, Gurminder Sangha, Joe Perez, Kristina Gallagher, Lanie Suderman, Michelle Brunetti, Nichole Mosqueda, Robert Poythress, Todd Lile, Wendy Lomeli

7.3 Consideration of approval of Michelle Jones' Director application to the WDB representing AutoZone for a 3-year term.

Staff have had a difficult time finding representation from the Chowchilla area. Prospective members have stated that they are too busy while other organizations are too small to be eligible for a seat on the Board. The AutoZone Distribution Center has an internal truck driving program which gives them insights into the need for drivers and training as well as insights into the transportation sector.

Vote: Approved – unanimous

Yes: Aaron Chambers, Brett Frazier, Emilio Hipolito, Gurminder Sangha, Joe Perez, Kristina Gallagher, Lanie Suderman, Michelle Brunetti, Nichole Mosqueda, Robert Poythress, Todd Lile, Wendy Lomeli

8.0 Information Items

8.1 Success Stories

Information provided within the agenda packet.

8.2 WDB Action Planning Subcommittee Updates

Information provided within the agenda packet.

- *Leadership Committee: Michelle Jone's appointment to the WDB was the last piece of the committee's work filling a transportation and logistics sector seat on the WDB. Once Archer and Hound finalizes the marketing hub, the committee will start looking at how the marketing hub information can be incorporated into the committee's recruitment goals. The committee is continuously looking for opportunities for WDB members to participate in conferences and meetings. Nichole Mosqueda is considering attending the National Association of Workforce Boards (NAWB) annual conference taking place in Las Vegas this year alongside Maiknue. This conference is typically held in Washington DC but is now going on the road and taking place in Las Vegas, followed by Chicago followed by New York before returning to Washington DC for their 50th anniversary.*
- *Policy Committee: the committee has completed their work with policies and members are being folded into other committees. Some members will join and support the Ethics committee and the Training committee. Brett will now Chair the Marketing committee. Meetings will be scheduled on an as-needed basis.*
- *Ethics: the committee is looking at calendars in order to schedule a meeting soon. Nichole will be meeting with Kristin McKenna to work on language for training flyers to solicit students to participate in the training modules that have been identified. Soliciting for employers is next. Imago will be used to create assessments around the soft skills the WDB identified and prioritized by employers. There will be AI assessments that will help determine participants' levels. Participants will do a pre-test as well as a post-test to measure any improvements. WDB members were encouraged to participate in the Graduate Profile taking place in March and promote the event to businesses or employers from the community so that they can participate.*
- *Marketing: staff and the marketing committee met with Archer and Hound. The Brand Hub was reviewed and the wrap for the van was discussed. The Committee felt that using "Work Starts Here" for vehicle branding was preferred and not too wordy. A QR code will be developed that will take users to a landing page that will allow them to pick whether they are looking for work or looking for talent. The van is ready and staff are working on purchasing the necessary equipment and computers for the 5 workstations. There will be a staff area and printers, laptops, Starlink internet, canopies/tents among the items being purchased at this time. The Van will be parked at the juvenile probation parking lot. This is a secure and fenced in location. A ribbon cutting will be planned. An invitation will go out to the Irvine Foundation as well as both Boards.*
- *Training: the committee is working on increasing its members and scheduling meetings.*

8.3 Madera County Workforce Investment Corporation (MCWIC) Update

Information provided within the agenda packet.

8.4 Federal and Legislative Updates

Information provided within the agenda packet.

8.5 PY 2025-2028 Local and Regional Workforce Plan Approvals

Information provided within the agenda packet.

8.6 PY 2025-2027 Local Area Subsequent Designation and Local Board Recertification Approval

Information provided within the agenda packet.

8.7 PY 2024-2025 Employment Development Department (EDD) Final Monitoring Report

Information provided within the agenda packet.

8.8 Information on FY 2024-2025 MCWIC Audited Financials

Information provided within the agenda packet. MCWIC received a clean audit with no findings or adjustments. The audited financials were presented to the MCWIC Board at their meeting on December 11, 2025. The financials were audited by Price Page & Company. Staff noted that they are a very good team and a great agency and always do a

great job explaining the report to the Board. An audit usually takes 1 to 2 weeks – it took them approximately 2 days to audit MCWIC's financials.

8.9 Weekly Unemployment Insurance (UI) Initial Claims for Madera County

Information provided within the agenda packet.

9.0 Written Communication

None.

10.0 Open Discussion/Reports/Information

10.1 Board Members

- *Brett Frazier stated that his son is working with Madera Workforce for services and is telling his friends about the program.*
- *Todd Lile spoke about teachable moments which involves using real world events that can bring up topics of conversation and how topics from current events come up. Teachers are less comfortable discussing those events with students but students would really prefer to discuss current events. The school district is working on a project called The Good Humans Project that works with students ranging from kindergarten to 12th grade to help students have teachable moments conversation in an age-appropriate way.*
- *Gurminder Sangha stated that a Rising Scholar counselor was hired.*

10.2 Staff

- *Jessica Roche, Controller, stated that staff are working on replacing the projector with a new audio/visual set up.*
- *Maiknue Vang, Executive Director, Thanks the WDB for their hard work and believing in the vision. Madera is starting to get approached by large foundations to apply for grants. This shows that the work being done by the Madera WDB and its action planning is working.*

11.0 Next Meeting

The next WDB meeting will take place at the Workforce Assistance Center on February 19, 2025.

12.0 Adjournment

Meeting adjourned at 4:20 p.m.

From: Perez, Remedios J@DOR
Sent: Friday, January 9, 2026 9:12 AM
To: Maiknue Vang

Subject: Retirement

Good morning, Maiknue.

As I approach my retirement with the Department of Rehabilitation at the end of this month, January 31st, I wanted to take a moment to personally reach out and express my sincere gratitude. It has truly been an honor to partner with the Madera County Workforce Assistance center and the Workforce Development Board, over the years. As a partner, our collaboration has been essential, meaningful, and impactful, and I am deeply appreciative of the opportunity to work alongside such dedicated professionals. I have learned so much through our shared efforts, and I am grateful for the relationships, collaboration, and mutual support we have built together in service of our community. Working with the board has been a highlight of my career, and I will always value the experiences, lessons, and partnerships that have come from our work together. As I enter this new phase of my life in retirement, I do so with great appreciation for the time we have spent collaborating and the positive work we have accomplished.

Thank you again for your partnership, professionalism, and commitment over the years. I am truly grateful for the opportunity to have worked with all of you, and I wish you continued success.

Take care..

R. Joe Perez, MS
Staff Services Manager I
Department of Rehabilitation

One-Stop (OS) / AJCC Operator 2nd Quarter Report



Program Year (PY)	2025-2026
Report Period	Q2: October 1, 2025 – December 31, 2025
Local Workforce Area	Madera County

BACKGROUND

The Munoz Group (TMG) was procured to provide One-Stop Operator Services for the Sub-Region as July 1, 2025. The Sub-Region is comprised of four local workforce development areas: Kings County, Madera County, San Joaquin County, and Stanislaus County. TMG services are to include AJCC partner meeting facilitation, coordination of service delivery among workforce partners, and MOU review/compliance. Each local area has the flexibility to customized services delivered by the One-Stop Operator. Madera County functioned as the lead for procurement and contract administration.

OS OPERATOR DELIVERABLES– 2nd Quarter

- Updated Partner Data Base
- Coordinated and Facilitated Three Monthly Partner Meetings
- Reviewed/Monitored Customer Satisfaction Surveys for Q1
- Developed and Implemented Partner Information Sharing System
- Maintained Partner Engagement
- Modification and Implementation of Madera Action Plan
- Two On-Site Meetings with MCWAC and Partner Staff



Deliverable Related Activities Summary

ACTIVITY	DATE	IMPACT(S)
Monthly AJCC Partner Meetings	September 8 th October 8 th November 12 th	<ul style="list-style-type: none"> • Maintained Partner Engagement • Added New Partners to Service Partnership
AJCC Action Planning	October 2025 – December 2025	<ul style="list-style-type: none"> • Alignment of Continuous Improvement Plan with Local and State Workforce Strategies • Review Existing MCWAC Initiatives • Modifications/Prioritization of Initiatives for 2025-2026 (based on customer flow, grant awards, and partner priorities)
Meet with MCWAC Staff	October 2025 and November 2025	<ul style="list-style-type: none"> • Supported Ongoing Continuous Improvement Initiatives • Developed Strategies for Increased Targeted Partner Engagement
Developed + Implemented Partner Information Network	November – December 2025	<ul style="list-style-type: none"> • Increased Efficiency of Information Share • Potential for Increase Professional Development • Service Delivery Issue Awareness (among service partners) • Added capacity for service integration and leveraged efforts

Deliverable Related Attachments:

- Partner Meeting Agendas
- MCWAC / AJCC Partner Network Screenshots



America's JobCenter
of California™

California Indian Manpower
Consortium

Central Valley
Opportunity Center

Housing Authority of the City
of Madera

Job Corps

Madera County Department
of Social Services

Madera County Workforce
Investment Corporation

Madera Unified School
District
Madera Adult School

SER - Jobs for Progress, Inc.

State Center Adult Education
Consortium

State Center Community
College District
Madera Community College
Center

State of California
Department of Rehabilitation

State of California
Employment Development
Department

Madera County AJCC Partner Meeting Agenda **IN-PERSON**

Workforce Assistance Center
Executive Conference Room
Wednesday, October 8, 2025
9:00 A.M. to 10:00 A.M.

[Zoom Link \(Limited View\)](https://us06web.zoom.us/j/85074361359)
<https://us06web.zoom.us/j/85074361359>

PRESENTATION: Workforce Assistance Center / AJCC Customer Satisfaction Survey

I. UPDATES on ACTIONS / ACTIVITIES REPORTS

- Action 1 – Centralized Information Exchange
- Action 2 – Plan for Referral System Modifications
- Action 3 - Survey – Professional Development

II. IMPACTS

	Customer Impact	AJCC Partnership Impact
Action 1	Access to Quality Services	Improved Outreach and Recruitment
Action 2	Enhanced Service Options/Coordination	Leveraged Activities (financial and improved outcomes)
Action 3	Continuously Improving Experiences (via high quality delivery staff)	Potential for Linked Training Goals and Cost Efficiencies

III. Upcoming and/or New Actions + Related Activities

IV. Partner Updates

V. Professional Development Spotlight: Urgent Needs

Food – Distribution of Update Resources / Calendars

VI. Declarations and Last-Minute Announcements

Support the Ongoing Clothing Drive!

NEXT MEETING:

November 12th Zoom Call 9:00 A.M.



America's Job Center
of California

California Indian Manpower
Consortium

Central Valley
Opportunity Center

Housing Authority of the City
of Madera

Job Corps

Madera County Department
of Social Services

Madera County Workforce
Investment Corporation

Madera Unified School
District
Madera Adult School

SER - Jobs for Progress, Inc.

State Center Adult Education
Consortium

State Center Community
College District
Madera Community College
Center

State of California
Department of Rehabilitation

State of California
Employment Development
Department

Madera County AJCC Partner Meeting Agenda

Wednesday, November 12, 2025
9:00 A.M. to 10:00 A.M.

[Zoom Link](#)

- I. **AJCC Update + Action Report**
- II. **Partner Updates**
- III. **Urgent / Emergency Needs Information Share / Discussion**
Focus: U.S. Government Shutdown Service Impact
- IV. **Declarations and Last-Minute Announcements**
[Grant Opportunity: Employment and Training Pathways Program](#)
Informational Webinar – November 13, 2025: [Link to Register](#)
Grant Due Date: December 8, 2025

Potential Customer / Participant Impact:

Change in State and Federal Policy - CDL Requirements

[Link to U.S. Department of Transportation Summary](#)

[Link to State of CA DMV - Changes to CDL Requirements](#)

[Link to U.S. Department of Transportation Newsroom \(October 24, 2025\)](#)

NEXT MEETING:

December 10, 2025

Zoom Call at 9:00 A.M

[Link to AJCC Partner Information Network + News](#)





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Consortium

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Opportunity Center

Housing Authority of the City
of Madera

Job Corps

Madera County Department
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SER - Jobs for Progress, Inc.

State Center Adult Education
Consortium

State Center Community
College District
Madera Community College
Center

State of California
Department of Rehabilitation

State of California
Employment Development
Department

Madera County AJCC Partner Meeting Agenda

Wednesday, December 10, 2025

9:00 A.M. to 10:00 A.M.

[Zoom Link](#)

- I. AJCC Update + Action Plan Update
- II. AJCC Sub-Region Partners
- III. Service Partner Virtual Roundtables
 - a. 3rd Quarter Referral Period
 - b. Mini-Survey Follow-Up
- IV. Front-Facing (Initial) Services
- V. Partner Updates / Announcements
- VI. Declarations and Last-Minute Announcements

NEXT MEETING:

WEDNESDAY

January 14, 2026

IN-PERSON MEETING

[Link to AJCC Partner Information Network + News](#)

MADERA COUNTY WORKFORCE ASSISTANCE CENTER / AJCC PARTNER NETWORK INFORMATION + NEWS (screenshots)

The screenshot shows a Zoom document interface. At the top, the title is "Madera County Workforce Assistance Center / AJCC Partner Network Information + News". The document content includes the "America's Job Center of California" logo and a section titled "LINKS FOR YOUR INFORMATION + RELATED DOCUMENTS to DOWNLOAD". Below this section are four cards:

- JOB FAIR:** 02/19/2026. JOB FAIR on FEBRUARY 19th. Hosted by CVCC - Flyer Below includes Event and Registration Details.
- ADENDA ATTACHED BELOW:** 02/11/2026. AJCC Partner Monthly Meetings 2nd Wednesdays at 9AM.
- Yosemite Adult School NWCO Training Spring 2026:** 02/11/2026.
- POSITION ANNOUNCEMENT: DEPUTY DIRECTOR:** 02/10/2026. CLOSING DATE: 2/17/26 4:00 P.M.

The screenshot shows a grid of document cards in a Zoom interface. The cards contain the following information:

- WORKFORCE ASSISTANCE CENTER:** 02/09/2026. Includes links for job listings: "Link to Job Listings 02/09/26", "NEW! Local Job Openings in Madera County (Weekly Update)", "Link to Job Listings 02/02/26", and "Link to Job Listings 01/28/26".
- SCAEC STATE CENTER ADULT EDUCATION CONSORTIUM:** 02/09/2026. SCAEC Spring Course Offerings.
- State of California EDD Employment Development Department:** 02/06/2026. EDD Virtual Workshop - Thursday, FEBRUARY 12th. Includes a "Resume Workshop" link.
- Thank You:** 02/06/2026. THANKS TO ALL PARTNERS TESTING THIS PAGE! We Very Much Appreciate Viewers and Commenters.
- WORKFORCE ASSISTANCE CENTER:** 02/04/2026. AJCC PARTNER ROUNDTABLES - WEEK OF FEBRUARY 16th and 23rd. LINK to SCHEDULE - Coming Soon.
- SCAEC:** 02/02/2026. COMPANIES LAYING OFF IN FEBRUARY 2026. NEWSWEEK ARTICLE.
- State of California EDD:** 02/02/2026. Helping Job Seekers Who Are Deaf or Hard of Hearing. Includes a "Link to YouTube Video".
- cwa california workforce association:** 02/01/2026. CWA WORKCON - APRIL 2026. Includes a "Link to Conference Registration".

**WORKFORCE DEVELOPMENT
BOARD OF MADERA COUNTY****SUPPORTIVE SERVICES POLICY**

EDD Revision Date: N/A

WIB Review Date: 7/26/07; 12/20/07, 12/17/09, 4/22/10, 9/23/10, 6/21/12; 6/27/13; 5/22/14;
12/17/15; 10/27/16; 12/15/16; 8/23/18; 10/21/21; 12/16/21; 3/7/22 (Exec); 6/16/22; 2/19/26

EXECUTIVE SUMMARY:**Purpose:**

This document establishes the Workforce Development Board of Madera County's policy regarding the provision of supportive services to individuals participating in WIOA-funded career and training services.

References:

- Workforce Innovation and Opportunity Act (WIOA) Sections 129 and 134
- Title 20 CFR Section 680.140; 680.900-920; 681.570

Policy:

The Workforce Innovation and Opportunity Act Section 134(d)(2) expressly permits the provision of supportive services to adults and dislocated workers who are participating in WIOA-funded career and training services, **if they are unable to obtain such services through other programs**, while Section 129(c)(2)(G) requires supportive services to be available to youth participants through the local system of eligible youth service providers. Section 3(59) of the Workforce Innovation and Opportunity Act defines supportive services as "services such as transportation, childcare, dependent care, housing, and needs related payments, that are necessary to enable an individual to participate in Workforce Innovation and Opportunity Act funded activities.

It is the policy of the Workforce Development Board of Madera County to facilitate the provision of supportive services to individuals who are participating in individualized career or training services, who are unable to obtain supportive services through other programs providing such services, and only when such services are necessary to enable individuals to participate in title I activities, as stipulated in 20 CFR Subpart G Section 680.910. Accurate information regarding the availability of supportive services in the local area, as well as referral to such services, will be provided as a basic career service to adults and dislocated workers through the local One-Stop delivery system (WIOA 134(d)(1)(B)). The Workforce Development Board of Madera County has established limits on the types of available supportive services and a limit of a maximum of \$1,500 of funding available to individual participants for supportive services funded through WIOA, as allowed under 20 CFR Subpart G Section 680.120. All supportive services

must be requested and approved in advance. Customers will not be reimbursed for supportive services purchases or payments that they have made directly.

The locally approved supportive services are as follows:

- Supportive Services will include, but may not be limited to: transportation assistance, mileage reimbursement, uniforms, tools, safety equipment, certification/licensing exam fees, medical services including required physicals and immunizations, drug testing, standardized work clothing or footwear, registration fees, or instructional books, materials, and supplies. Purchase of any of these items requires written documentation that the items are required for training or employment, and verification that they are not reimbursed or provided by the employer or training provider.
- Transportation allowance – Provided for non-paid activities; may include MAX passes, Dial-a-Ride tickets, or a flat-rate daily reimbursement, only if the service is not available through some other source. Limited transportation funds may result in only partial subsidy of transportation costs, based on individual needs and the availability of other resources. A flat-rate reimbursement per day of travel required for training will only be provided to individuals who must travel a minimum of 25 miles round trip per day to an unpaid training activity using their own vehicle. The base rate will be set at \$~~15.40~~ per day of travel; the rate may be temporarily adjusted periodically to account for significant changes in fuel costs and will not exceed \$~~20.45~~ per day. **Travel Reimbursement will only be available to individuals who can provide documentation of a current California Driver's License, as well as proof of current vehicle registration and insurance for the vehicle being used for travel.**
- Child Care Assistance – Assistance with childcare expenses may be provided on a limited basis for individuals participating in unpaid training programs, only if such assistance is not available from any other source. Childcare assistance will only be provided for the specific days and times that the participant is engaged in the unpaid training activity.

These limits apply to WIOA formula-funded activities and services. Exceptions to these limits may be approved by the Executive Director (or designee) on a case-by-case basis for specific training programs or employment opportunities with higher support costs/needs. Projects funded by specific grants or from sources other than WIOA formula allocations will follow any limits established by the specific grant, proposal, or project, and may exceed the limits established here, when necessary, allowable, and appropriate for successful participation in, or retention in and completion of, training or employment. In addition, the provision of supportive services may be suspended, revoked, or reduced at any time, based on funds available, changes in program design or delivery, or at the discretion of the Executive Director.

Action:

This policy is effective on the date approved by the Workforce Development Board of Madera County, and replaces the previous version approved by the ~~WDB Executive Committee on June 16 March 7, 2022, and ratified by the Board on April 21, 2022.~~ Retain this policy until further notice.

Inquiries:

If you have questions, please contact the Executive Director or designee at (559) 662-4500.



Agenda Item 8.1

Consent Action Information

To: Workforce Development Board of Madera County
From: Maiknue Vang, Executive Director
Date: February 19, 2026
Subject: Success Stories

Information:

Program participants and employers share about their experience working with the workforce system and how their participation and partnership has contributed to positive results.

Financing:

Workforce Innovation and Opportunity Act

Meet Malery

A Workforce Success Story

A Shared Milestone

After working as a CNA for 29 years, Malery Hernandez never imagined she would start over. When the Children's Hospital laid her off due to COVID-19, she faced uncertainty about her next steps, but also saw an opportunity to lead by example.

Malery decided to return to school because her daughter wanted to pursue a career as a Licensed Vocational Nurse.

Sponsored by the Madera County Workforce and guided by their staff, Malery enrolled in the LVN program at the Institute of Technology, and together they began their training as mother and daughter.

Returning to school after many years required commitment and perseverance, but Malery stayed focused on her goal.



In August 2025, she and her daughter graduated together from the LVN program, a milestone that made the journey even more meaningful.

In November 2025, Malery became a Licensed Nurse and now works at Pain Clinics of Central California. She earns \$29 per hour and receives medical benefits.

Today, Malery continues her healthcare career with renewed confidence, proving that it's never too late to start again and that leading by example can make all the difference.

Malery turned resilience into a powerful new chapter.

“ I made the decision to return to school to support and motivate my daughter as she pursued her goal of becoming a Licensed Vocational Nurse. Attending LVN training together and graduating side by side made the journey even more meaningful. –Malery ”

Meet

Gary Gonzalez
Insurance Agency

A Workforce Success Story

Trusted Local Leader

Gary Gonzales Insurance Agency is a trusted Allstate provider serving the Central Valley region, including Madera and Fresno, California.

Established in 1999, the agency has more than 26 years of experience delivering personalized insurance solutions to individuals, families, and businesses.

Recognized for its strong community involvement and customer-first philosophy, the agency has earned an A+ rating from the Better Business Bureau and consistently receives high marks for customer satisfaction.



The agency is known for its in-depth understanding of California insurance requirements and the unique needs of Central Valley residents and business owners.

Clients value its responsiveness, affordability, and personalized guidance throughout the insurance process.

With more than two decades of reliable service, Gary Gonzales Insurance Agency has built a reputation for professionalism, integrity, and lasting community impact, actively supporting local youth programs and community initiatives.

Strengthening teams through partnership.

“ We have been thoroughly impressed with the candidate Johanna that was forwarded over to us from Madera Workforce. The program has been easy to work with, and Jorge has also been very catering and supportive of our process to bring on a new staff person into our agency. So far everything is working out better than expected. Thank you for all of the support and sharing these programs with our agency here in Madera. Keep up the good work.

–Gary Gonzales Insurance Agency”



**WORKFORCE DEVELOPMENT
BOARD OF MADERA COUNTY**

Agenda Item 8.2

Consent

Action

Information

To: Workforce Development Board of Madera County

From: Maiknue Vang, Executive Director

Date: February 19, 2026

Subject: WDB Action Planning Subcommittee Updates

Information:

Each of the 5 subcommittees will have an opportunity to share progress toward action items outlined in each priority area. The subcommittees include Leadership Engagement, Training, Work Ethics, Marketing, and Policy.

Financing:

Workforce Innovation and Opportunity Act



Agenda Item 8.3

Consent Action Information

To: Workforce Development Board of Madera County
From: Maiknue Vang, Executive Director
Date: February 19, 2026
Subject: Madera County Workforce Investment Corporation (MCWIC) Update

Information:

The MCWIC Board is scheduled to meet on February 26, 2026. They last met on December 11, 2026. The agenda for their December meeting was provided to the WDB at their December 18, 2026 Board meeting.

Financing:

Workforce Innovation and Opportunity Act



Agenda Item 8.4

Consent Action Information

To: Workforce Development Board of Madera County
From: Maiknue Vang, Executive Director
Date: February 19, 2026
Subject: Local Business Closures

Information:

The Business Services Division coordinated a Rapid Response Orientation in December to support the 12 employees impacted by Quality Container Company’s closure at the end of 2025. Partners provided information and guidance to assist affected employees with accessing unemployment insurance, re-employment opportunities, training services, and other support benefits available through the local workforce system.

Following the closure of Quality Container, two additional employers, Mission Bell Winery and JBT Marel, announced plans to cease operations, affecting 269 workers. Mission Bell layoffs will begin April 3, 2026, and conclude by June 2026. JBT employees will be laid off starting on September 18, 2026, in phases to be completed by December 31, 2026. In addition, as of February 9, Ardagh Group, has laid off 45 employees as well.

Our Rapid Response team is coordinating with all impacted employees and local and regional partners to ensure that workers receive timely information and direct connections to services that support rapid re-employment and career transition. Our Business Services team will also be coordinating a job fair for employees impacted by these recent layoffs. Employers with current or upcoming hiring needs that may be interested in re-employing impacted employees are encouraged to connect with our team to help retain local talent.

Financing:

Workforce Innovation and Opportunity Act



Agenda Item 8.5

Consent Action Information

To: Workforce Development Board of Madera County
From: Maiknue Vang, Executive Director
Date: February 19, 2026
Subject: Federal and Legislative Updates

Information:

On February 3, 2026, the House of Representatives narrowly approved a \$1.2 trillion Fiscal Year (FY) 2026 Appropriations package, ending a brief partial government shutdown and keeping most federal agencies funded through September 30, 2026. The bill includes the Labor, HHS, Education Appropriations Bill, which was previously passed by the Senate, which will keep federal workforce development program funding at or very near to current funding levels through September 30, 2026, while temporarily extending Department of Homeland Security funding for two weeks to allow continued negotiations on that larger bill. With the overall funding framework now in place, over the next few months, the U.S. Department of Labor will issue a Training and Employment Notice applying statutory formulas to determine each state's allotments, followed by the Employment Development Department publishing in-state allocations for program year 2026-27.

Staff will continue to work with the California Workforce Association and their policy analyst and federal lobbyist, as well as the California Workforce Development Board and additional workforce stakeholders to keep the local area posted on any new developments as conditions evolve.

Financing:

Workforce Innovation and Opportunity Act



Agenda Item 8.6

Consent Action Information

To: Workforce Development Board of Madera County
From: Maiknue Vang, Executive Director
Date: February 19, 2026
Subject: Information on James Irvine Foundation Better Careers Retreat

Information:

The James Irvine Foundation and their Better Careers team will be visiting Madera County on April 14-15, 2026. Their visit will begin at the Tesoro Viejo Camarena Health Center where staff will provide an overview of the public workforce system, priorities and challenges, and local updates on Madera's current project with the Irvine Foundation. The afternoon will include a tour of the Workforce Assistance Center, our mobile unit, and a partner discussion before heading over to the Justice Center and concluding the day with a tour of our mini AJCC. On the second day, the Better Careers team will meet at the Center to debrief and wrap up their retreat.

Financing:

Workforce Innovation and Opportunity Act



Agenda Item 8.7

Consent Action Information

To: Workforce Development Board of Madera County
From: Maiknue Vang, Executive Director
Date: February 19, 2026
Subject: Update on PY 2024 Local Area Performance Scores

Information:

Program Year 2024 Workforce Innovation and Opportunity Act (WIOA) Annual Performance scores are provided below. This data set includes participant data for the Title I Adult, Dislocated Worker, and Youth programs.

WIOA has five primary indicators of performance: Employment Rate 2nd Quarter After Exit, Employment Rate 4th Quarter After Exit, Median Earnings, Credential Attainment, and Measurable Skill Gains. These numbers show actual performance results. Madera met* or exceeded* negotiated performance goals in all indicators except for Youth Employment Rate Q4.

Performance will be adjusted as described in *Calculating Local Area Performance and Nonperformance* ([WSD20-02](#)), and final results will be released later in 2026.

	Adult Negotiated	Adult Actual	DW Negotiated	DW Actual	Youth Negotiated	Youth Actual
Employment Rate Q2	68.1%	67.5%	73.5%	84.6%	67.7%	64.1%
Employment Rate Q4	67.5%	66.2%	77%	75%	75.2%	62.5%
Median Earnings	\$7,800	\$7,676	\$8,000	\$13,578	\$7,100	\$8,361
Credential Attainment	80%	92.5%	80%	80%	80%	86.4%
Measurable Skill Gains	67.8%	81.7%	74%	73.7%	60.8%	68.9%

*Goal Met - “Meeting” defined as achieving 90% of established goal.

*Goal Exceeded - “Exceeding” defined as achieving above 100% of established goal.

Financing:

Workforce Innovation and Opportunity Act



Agenda Item 8.8

Consent Action Information

To: Workforce Development Board of Madera County
From: Maiknue Vang
Date: February 19, 2026
Subject: Program Impact Report July 1, 2025, through December 31, 2025

Information:

The Program Impact Report for July 1, 2025, through December 31, 2025, is provided for the Board's review. We saw an increase in total visits to the Center and workshops provided. Our enrollments remained steady with more dollars invested in training and supportive services than we did at this time last year.

Financing:

Workforce Innovation and Opportunity Act



The Madera County Workforce Assistance Center is a partnership of community agencies specializing in meeting a variety of education, skill development, and employment needs.

VISITS TO THE ONE STOP CENTER

19,284

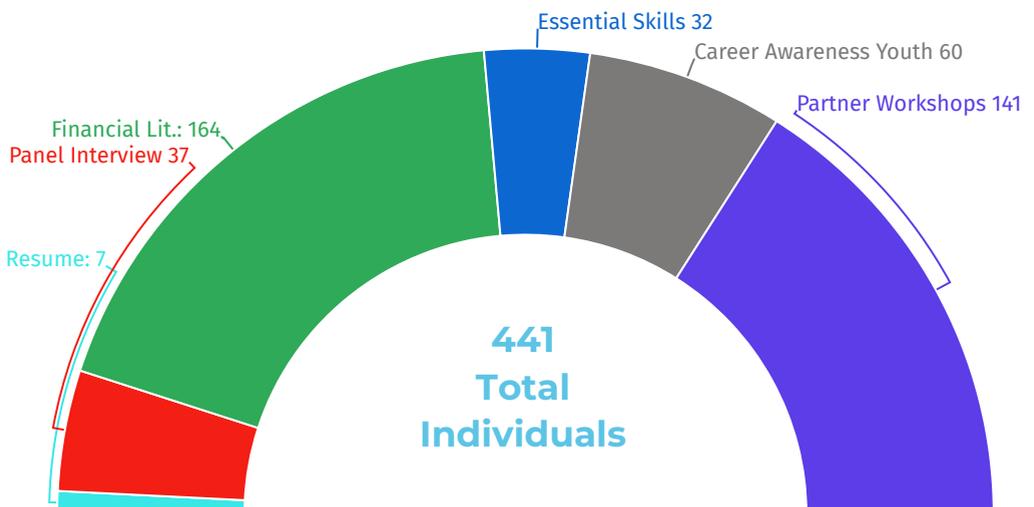
TOTAL SERVICES PROVIDED

16,030

"I made the decision to return to school to support and motivate my daughter as she pursued her goal of becoming a Licensed Vocational Nurse. Attending LVN training together and graduating side by side made the journey even more meaningful."

-Malery

NUMBER OF INDIVIDUALS WHO ATTENDED WORKSHOPS

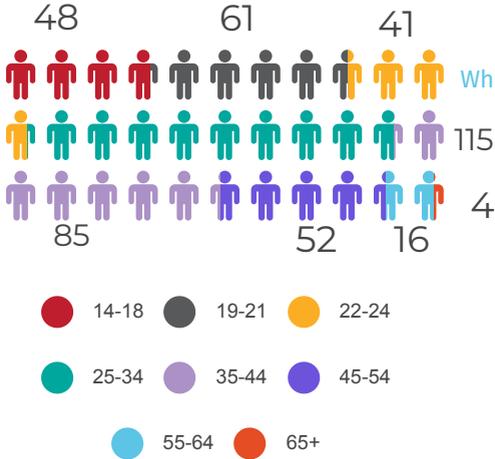


* Numbers reflect in person sessions

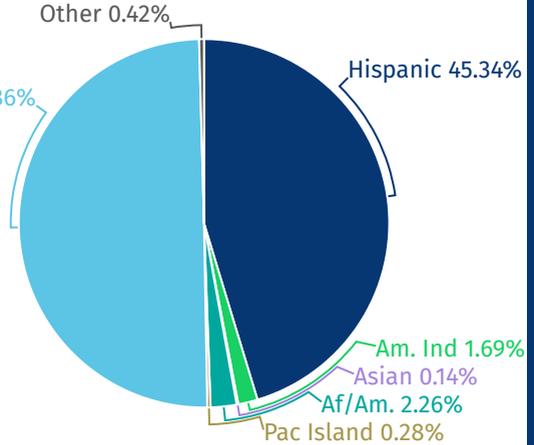
Job Seeker Demographics

The Workforce Development Board of Madera County serves a diverse job seeker base. Numbers below represent individuals enrolled in WIOA Adult, Dislocated Worker, Youth and Special Grants.

AGE



RACE/ ETHNICITY



PRIORITY POPULATIONS



13% Persons with Disabilities



1% Pregnant/ Parenting Youth



24% English Language Learners



72% Basic Literacy Skills Deficient



18% Single Parents



8% Homeless



25% Offenders

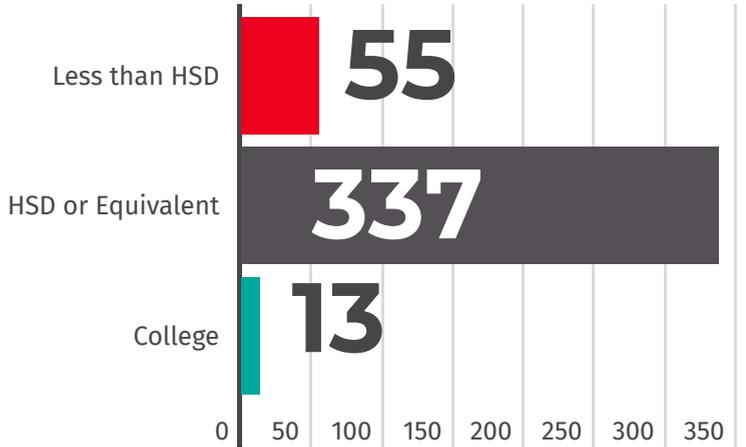


2% Veterans

GENDER



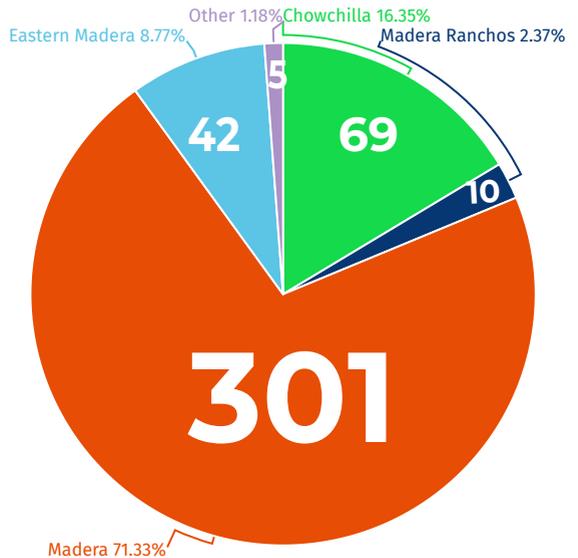
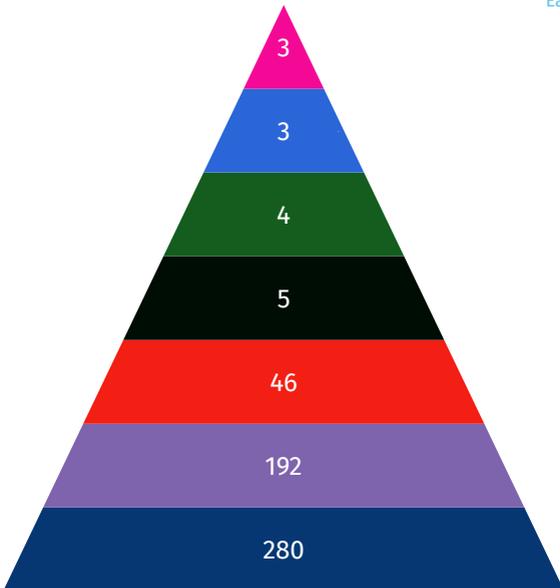
EDUCATIONAL ATTAINMENT



INCOME/PUBLIC ASSISTANCE

- Low Income
- SNAP
- TANF
- SSI
- SDI
- State or Local Income Based Assistance
- Foster Child

RESIDENCE



CAREER SERVICES

Intensive services for enrolled individuals include career counseling, supportive services, paid work experience, and job search preparation and support. Activities and outcomes represent special projects and WIOA individuals.

ENROLLMENTS



Served
703



Participants Carried In
243



Enrolled
422



New Participants
179

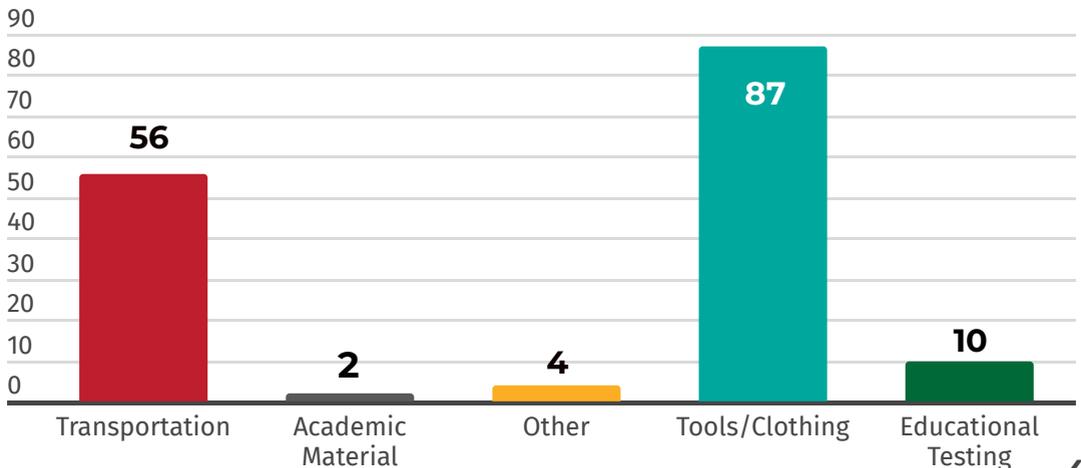


Entered Employment
At Exit **46%**

* Non WIOA Justice Impacted Individuals - 281

"Services provided at Valley State Prison, County Jail, Justice Center and Juvenile Detention Facility."

SUPPORTIVE SERVICES



TRAINING

Median Earnings
4th Quarter after exit

\$10,622

Received Industry Recognized
Certificate *

38%

Occupational Skills Training

178

Training Related Employment*

51%

* Not all participants have finished training

Direct Client Costs by Industry

Transportation/Logistics= 39

Manufacturing= 9

General Business = 3

Installation/Maintenance = 12

Forestry = 22

Healthcare = 36

Hospitality/Service = 8

Construction = 7

Protective Services = 6

INVESTMENTS

\$104,411.81

Total Supportive
Services

\$280,551.44

Total
Occupational Skills Training

\$5,337.00

Average Cost Per
Job Seeker

Work Based Learning Expended & Employer Savings



BUSINESS SERVICES

WDB staff members engage with the business community to better serve the workforce needs of the county.



35

Internal Job Orders Created



47

Business Outreach Campaigns



722

Businesses Served



2,365

Services Provided to Businesses



4

Rapid Response Events



12

Job Fairs

"We have been thoroughly impressed with the candidate that was forwarded over to us from Madera Workforce. The program has been easy to work with, and you have also been very catering and supportive of our process to bring on a new staff person into our agency. So far everything is working out better than expected. Thank you for all of the support and sharing these programs with our agency here in Madera. Keep up the good work."

Allstate Agent
G. Gonzales.



WORKFORCE DEVELOPMENT
BOARD OF MADERA COUNTY

Workforce Development Board of Madera County
2037 W. Cleveland Ave
Madera, CA 93637
www.maderaworkforce.org



Agenda Item 8.9

Consent Action Information

To: Workforce Development Board of Madera County
From: Jessica Roche, Controller
Date: February 19, 2026
Subject: Workforce Innovation and Opportunity Act (WIOA) Formula and Special Projects Quarterly Program Overview

Information:

WIOA Formula and Special Projects Quarterly Program Overview report for period ending December 31, 2025, is provided for the Board's review. The report reflects data for the fiscal year 2025-2026.

Financing:

Workforce Innovation and Opportunity Act

WIOA Formula and Special Projects Quarterly Program Overview as of December 2025

Madera County Workforce Investment Corporation (MCWIC) is a nonprofit 501(c)(3) and is both the fiscal agent and the program operator for the Workforce Innovation and Opportunity Act (WIOA) in Madera County and operates as the Local Workforce Development Area (LWDA) for Madera County. MCWIC’s primary annual source of income is the WIOA funds, but the organization also operates miscellaneous grants and awards that assist in achieving MCWIC’s mission and goals and are also used to leverage and complement the WIOA funding.

WIOA Funding Requirements AB1149

Senate Bill AB1149 (amended SB734) requires that 20% of Adult and Dislocated Worker funding will support *direct training expenses* with a planned assumption of 10% leverage in order to meet the full requirement of 30%. The following reflects that both the direct and leverage training has exceeded 30% minimum requirements, achieving 37.76% funds spent on training to date.

Summary of Leveraged Resources			
1. LWIA Name	MAD		
2. Date	12/31/2025		
3. Year of Appropriation	2024 AA511014 - Term 6/2026		
Program Year Funding and Training Expenditures			
		% Achieved	Amount
4. Adult and Dislocated Worker Formula Fund Allocations			\$ 1,464,591
5. Training Expenditure Requirement (direct & leveraged)			\$ 439,377
6. Formula Fund Training Expenditures (20% minimum per AB1149 = \$292,918.20)		19.74%	\$ 289,148
7a. Leveraged resources used for Training (10% = \$146,459.10)		18.02%	\$ 213,410
7b. Leveraged resources used for Supportive Services			\$ 50,481
8. Total amount spent on Training and Supportive Services (should equal or exceed Line 5)		37.76%	\$ 553,039
Leveraged Resources Detail			
8. Source (See page 2)	Total Amount	Training	Supportive Services
A - Pell Grant	\$ 99,907	\$ 99,907	
B - Programs authorized by the WIOA (not Formula)	\$ 78,762	\$ 77,138	\$ 1,624
C - TAA	\$ -		
D - DOL NDWG	\$ -		
E - Match from employers, industry, and industry associations	\$ 36,365	\$ 36,365	
F - Match funds from Joint labor Management trusts	\$ -		
G - ETP grants	\$ -		
H - SS for training WIOA Formula	\$ 47,237		\$ 47,237
I - TANF SS	\$ -		
J - TANF TJT/WEX	\$ -		
K - Other local,state,fed funds	\$ 1,620		\$ 1,620
I - CWDB approved funds	\$ -		
Total	\$ 263,891	\$ 213,410	\$ 50,481

WIOA Funds Utilization

Funds utilization requirements are applicable to adult, dislocated workers and youth funds allocated by formula to LWDA's. The funds utilization requirement does not apply to Rapid Response, the 25 percent funds, or projects funded using the Governor's discretionary funds.

The LWDA is required to obligate at least 80 percent of their program dollars by the end of the first program year for which they were allotted. The determination regarding whether a Local Area has obligated 80 percent of its funds will occur after the first quarter of each program year for the prior program year. MCWIC tracks this data on a quarterly basis to make sure it is on track with the WIOA requirements.

Specific to the WIOA Youth Formula funds, there are two additional program and expenditure requirements that are to be met at the end of the two-year term of the allocation. A minimum of 75% of youth formula allocation is to be spent on Out-of-School (OS) youth and a maximum of 25% on In-School (IS) Youth. The other requirement is that 20% of the 80% program portion of the allocation is to be spent on youth work experience. Youth work experience provides IS and OS an invaluable opportunity to develop work place skills. Work experience may include, but are not limited to, paid work experience, on-the-job training, pre-apprenticeship training, etc. as outlined in EDD WSD 17-07. Expenditures allowed to be applied to the 20% requirement include staff time working with employers and participants enrolled in work experience activity, incentive payments for achievement to work experience, and other job readiness type of training.

MCWIC FUNDS UTILIZATION STATUS - AA511014 YOA 2024 (2024-2026)						as of	12/31/2025
Allocation Balance Remaining							
Formula Fund	Total Allocation	Allowable "Program" Funding 90% (less 10% admin)	Expenditures Reported	Obligations Reported	Percentage Expended to Date (Exp+Obl)	Allocation Balance Remaining until 6/30/2026	
Adult	\$ 1,001,189.00	\$ 901,070.10	\$ 510,178.84	\$ 203,949.57	71%	\$ 287,060.59	
Youth	\$ 900,738.00	\$ 810,664.20	\$ 700,200.14	\$ 135,796.28	93%	\$ 64,741.58	
Dislocated Worker	\$ 463,402.00	\$ 417,061.80	\$ 280,206.52	\$ 10,374.67	63%	\$ 172,820.81	
OSY Youth Expenditure Status, by June 30, 2026							
Formula Fund	Total Allocation	Admin Expenditures	OSY Program Expenditures	75% OSY Requirement on "Program" Funding	Additional Exp Needed to meet 75%	Percentage of Required Out of School Expenditures	
Youth	\$ 900,738.00	\$ 35,379.20	\$ 664,820.94	\$ 607,998.15	\$ -	109%	
Work Experience Expenditure Status, by June 30, 2026							
Formula Fund	Total Allocation	Admin Expenditures	Program Expenditures	20% WEX Requirement on "Program" Funding	WEX Expenditures Reported	Percentage of Required Out of School Expenditures	
Youth	\$ 900,738.00	\$ 35,379.20	\$ 664,820.94	\$ 162,132.84	\$ 187,068.83	115%	

Specific to Year of Allocation (YOA) 2024 funds (above chart), the LWDA is behind on expenditures due to decrease participation early on in program and lower enrollment numbers. However, management has increased enrollments with special project cohorts, and through strategic marketing has increased general enrollment into the WIOA program.

MCWIC FUNDS UTILIZATION STATUS - AA611014 YOA 2025 (2025-2027)					as of	12/31/2025
Allocation Balance Remaining						
Formula Fund	Total Allocation	Allowable "Program" Funding 90% (less 10% admin)	Expenditures Reported	Obligations Reported	Percentage Expended to Date (Exp+Obl)	Allocation Balance Remaining until 6/30/2026
Adult	\$ 959,342.00	\$ 863,407.80	\$ -	\$ -	0%	\$ 959,342.00
Youth	\$ 946,215.00	\$ 851,593.50	\$ -	\$ -	0%	\$ 946,215.00
Dislocated Worker	\$ 764,497.00	\$ 688,047.30	\$ -	\$ -	0%	\$ 764,497.00
Funds Utilization Status - 80% Obligation Requirement by 6/30/2026, End of First Program Year						
Formula Fund	Total Allocation	Allowable "Program" Funding 90% (less 10% admin)	80% Required Obligation Amount by End of 1st PY	Total Program Obligations Reported	Percentage of Total "Program" Obligations to 1st Yr 80% Requirement	Additional Obligations Needed by June 30, 2025
Adult	\$ 959,342.00	\$ 863,407.80	\$ 690,726.24	\$ -	0%	\$ 690,726.24
Youth	\$ 946,215.00	\$ 851,593.50	\$ 681,274.80	\$ -	0%	\$ 681,274.80
Dislocated Worker	\$ 764,497.00	\$ 688,047.30	\$ 550,437.84	\$ -	0%	\$ 550,437.84
OSY Youth Expenditure Status, by June 30, 2027						
Formula Fund	Total Allocation	Admin Expenditures	OSY Program Expenditures	75% OSY Requirement on "Program" Funding	Additional Exp Needed to meet 75%	Percentage of Required Out of School Expenditures
Youth	\$ 946,215.00	\$ -	\$ -	\$ 638,695.13	\$ (638,695.13)	0%
Work Experience Expenditure Status, by June 30, 2027						
Formula Fund	Total Allocation	Admin Expenditures	Program Expenditures	20% WEX Requirement on "Program" Funding	WEX Expenditures Reported	Percentage of Required Out of School Expenditures
Youth	\$ 946,215.00	\$ -	\$ -	\$ 170,318.70	\$ -	0%

Specific to Year of Allocation (YOA) 2025 funds (above chart), the LWDA has not yet applied any expenditures to this YOA, due to the high carryover of funds into 7/1/2025. However, as note above, management has increased enrollments through strategic marketing and outreach to the community.

MCWIC Program Update

MCWIC has a combination of WIOA grants as well as State and Local contracts. Outside of the WIOA formula funding, these additional grants and contracts are competitively procured. The following is a chart of grants and contracts obtained during the fiscal year as well as the enrollment and activity by grants.

MCWIC received a personal invitation from the James Irvine Foundation to submit a concept paper for consideration in an upcoming round of funding. This opportunity is in the early stages. If the concept paper is approved, MCWIC will be invited to apply for the additional funds. MCWIC proposes to provide training for home-based childcare entrepreneurs to include tuition and wrap around services, entrepreneurial support, and business stipends that may be used toward a menu of startup costs and activities. Funds will also support dedicated space in the Center for a Business Resource Center.

Madera is also developing a second contract with Fresno Regional Workforce Development Board and Yosemite Adult School for the Valley Build Program (a MC-3 Apprenticeship Readiness Program). The contract will support an additional 20 participants in receiving hands-on training and earning nationally recognized certifications that will help them qualify for union apprenticeships in the building trades. The second cohort is scheduled to start in April 2026 at Yosemite Adult School.

Additionally, Madera provided a letter of support to the City of Madera for the Community Cleanup and Employment Pathway (CCEP) Grant Proposal. The grant aims to assist individuals facing employment barriers, such as at-risk youth, justice-impacted individuals, and unhoused residents by providing paid work experience and training in maintenance, landscaping and equipment operations occupations. Participants will gain one

year of hands-on experience and resume-building experience with access to pathways leading to long-term employment.

Lastly, we are finalizing a contract with Golden Valley Unified School District (GVUSD) and Advanced Career Institute (ACI) to provide school bus driver training at GVUSD. The contract will sponsor 10 participants and help create a workforce pipeline of school bus drivers for GVUSD and the surrounding area. The tentative start date is April 2026.

<u>GRANTS and CONTRACT</u>	<u>Project Award Amount</u>	<u>Term</u>	<u>Count Served as of 12.31.25</u>
WIOA Formula Adult SCOPE: Provide employment, training, and supportive services assistance for eligible adult participants.	\$ 1,724,987.00	7/1/2025-6/30/2026	213 Enrolled
WIOA Formula Dislocated Worker (DW) SCOPE: Provide employment, training, and supportive service assistance for individuals who have been laid off due to a company downsize or closure.	\$ 724,855.00	7/1/2025-6/30/2026	38 Enrolled
WIOA Formula Youth SCOPE: Provide youth between the ages of 16-24 with employment, training, and supportive service assistance.	\$ 1,290,153.00	4/1/2025-6/30/2026	65 Enrolled
WIOA Formula Rapid Response & Layoff Aversion (Business Services) SCOPE: Provide timely and effective response to potential layoffs and business closures (WARN notices) as well as enable affected workers to return to work as quickly as possible following a layoff. Assist businesses with targeted job fairs and other employment services.	\$ 283,747.00	7/1/2025-6/30/2026	<ul style="list-style-type: none"> • 4 WARN Notices • 4 RR Orientations • 12 In person hiring events • 28 Recruitment flyers • 12 Small Business Workshops • 42,615 Text messages • 7 OJTs • 722 Businesses served

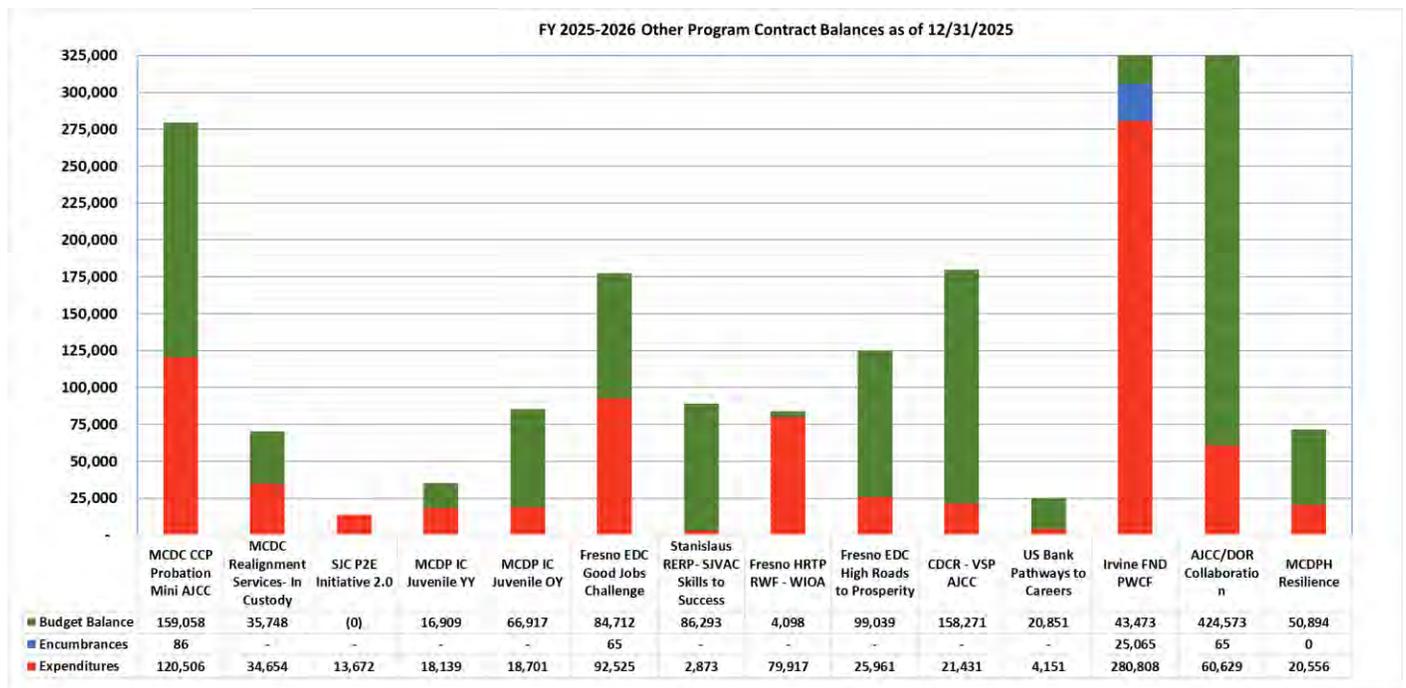
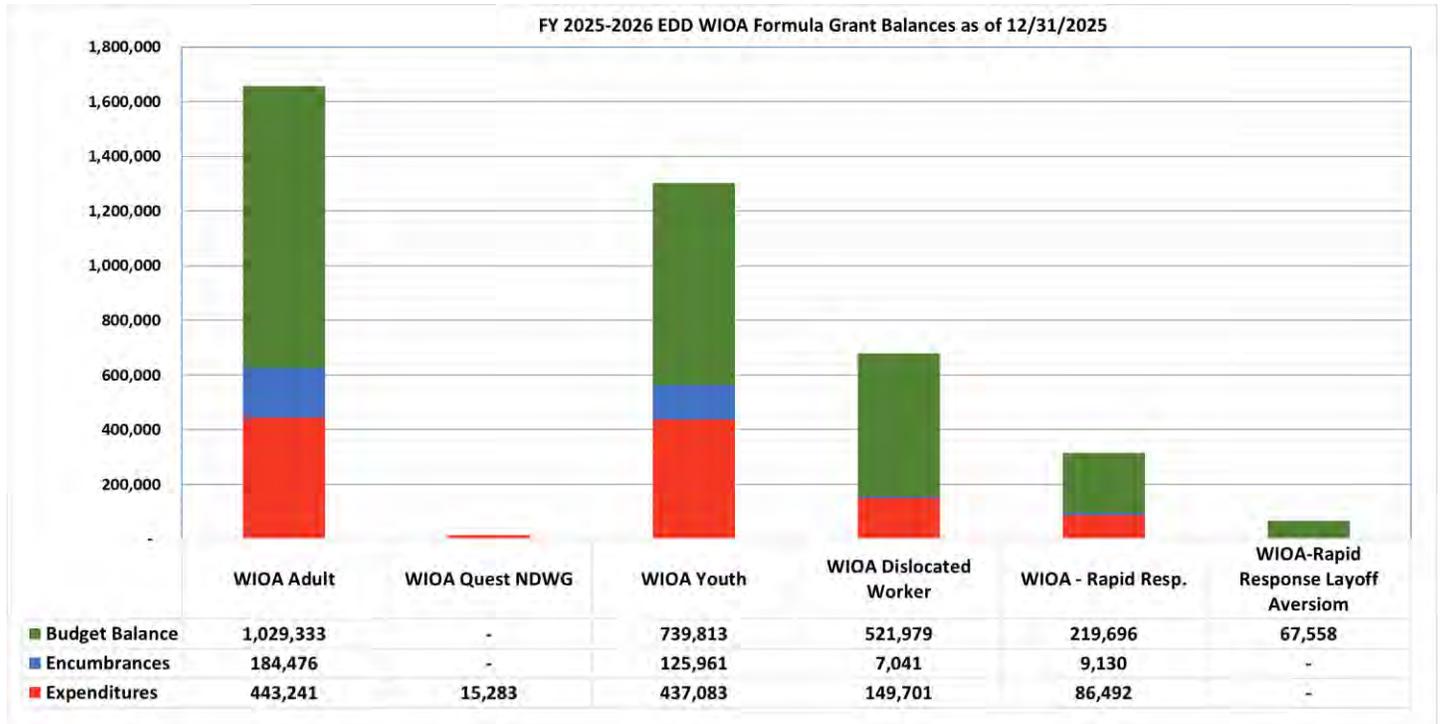
GRANTS and CONTRACT	Project Award Amount	Term	Count Served as of 12.31.2025
DOR/AJCC Collaborative	\$ 814,757.00	8/1/2025-3/31/2027	1 Enrolled 7 Served
SCOPE:	In collaboration with DOR and America's Job Centers of California (AJCC), funding will support local efforts to foster a culture of disability inclusion, rebuild staff capacity, and strengthen collaborations by increasing co-enrollments that support workforce participation in training, employment, and retention, ultimately leading to long-term positive outcomes for individual's with disabilities.		
EDC Good Jobs Challenge	\$ 507,195.00	4/01/2023-3/31/2026	106 WIOA Co-Enrolled
SCOPE:	In partnership with Fresno Economic Development Corporation and other key stakeholders, MCWIC will serve as the backbone lead for the Transportation industry and provide guidance and support through all phases of the grant in determining gaps in the training pipeline, facilitating sector partnership meetings between industry and education partners, and increasing access to trainings and opportunities to upskill individuals. In addition to Transportation, Madera will also coordinate with other backbone leads for training and employer support in the Business Services, Construction, and Manufacturing industries.		
Stanislaus P2E 2.0	\$ 148,796.00	6/1/2023-12/31/2025	38 Enrolled
SCOPE:	Funding to provide individual direct services to formerly incarcerated and other justice involved individuals.		
Fresno - High Road Training Partnership-Central California Forestry Corp	\$ 137,555.00	05/01/2024-12/31/2025	25 Enrolled
SCOPE:	In partnership with Fresno Workforce Board and Yosemite Adult School, funding will support recruitment, enrollment, supportive services, and employment activities for 35 individuals from low-income and underserved communities and candidates with barriers to employment who are interested in a career in Forestry. Individuals will attend a 10-week Forestry Training at Yosemite Adult School. Upon completion, participants will be eligible for employment with any local, state, and federal companies and earning self-sustaining wages.		
Quality, Jobs Equity Training (QUEST) National DW Grant	\$ 156,226.00	10/1/2022-9/30/2025	22 Enrolled
SCOPE:	Funding will be used to enable individuals adversely affected by the COVID-19 pandemic and the social and economic inequities that the pandemic exacerbated to enter, return to, or advance in high-quality jobs in growth industry sectors such as infrastructure, environment and climate, care economy, and other critical sectors with high-quality jobs.		
Regional Equity and Recovery Partnership (RERP)	\$ 131,342.00	10/1/2022-12/31/2026	8 Enrolled / 4 WIOA
SCOPE:	Funds will serve English language learner, immigrant, justice involved, veterans, older youth, dislocated workers, and low-income household target populations on building skills in manufacturing production, manufacturing welding/fabrication, and industrial/maintenance through training and work-based opportunities that will lead to sustainable quality jobs.		
CDCR-VSP	\$ 150,000.00	7/1/2025-6/30/2026	112 Referrals 35 Scheduled 35 Orientations 77 Mail Outs
SCOPE:	Staff assist residents with employment readiness, skills development, job training, and employment services. Staff work with inmates nearing parole to provide connections to an AJCC program in their area of residence post-release, labor market data, referrals to appropriate community resources, and support the development of basic job search portfolio, based on needs and interests identified.		
Madera County AB109 CCP In-Custody	\$ 67,996.00	7/1/2025-6/30/2026	10 Referred - 9 Completed
SCOPE:	Provide a maximum of 8, 4-week transitions workshops for In-Custody Pre-Release customers at Department of Corrections. The workshop is designed to serve individuals who are within 120 days of release from the correctional facility but can be offered to any individual that DOC staff deem appropriate.		

GRANTS and CONTRACT	Project Award Amount	Term	Count Served as of 12.31.2025
Madera County Mini AJCC @ Probation SCOPE: Located onsite at the Justice Center, staff provide Probation referrals access to the full array of services normally available only at the Workforce Assistance Center. Staff May provide career assessment, career counseling, workshops, development of an individual employment plan, labor market information/research, training, supportive services, job search activities, employment referrals, follow-up, and any other appropriate services.	\$ 258,332.00	7/1/2025-6/30/2026	127 Referred / 65 Appointments 8 Pending Eligibility / 28 WIOA Enrolled
Madera County Juvenile Probation Realignment- Older Youth SCOPE: Provide a 10-week workshop for In-Custody Pre-Release Older Youth at the Juvenile Detention Facility Monday through Friday. The workshop is designed to serve Individuals who are within 90 to 120 days of release from the Juvenile facility but may also be offered to any individual that Juvenile Detention Staff deem is appropriate.	\$ 37,795.00	7/1/2025-6/30/2026	4 Referred - 1 Assited/Connected to Resources
Madera County Juvenile Probation Realignment- Younger Youth SCOPE: Provide a 7-day workshop for In-Custody Pre-Release Younger Youth at the Juvenile Detention Facility Monday through Friday. The workshop is designed to serve Individuals who are within 90 to 120 days of release from the Juvenile facility but may also be offered to any individual that Juvenile Detention Staff deem is appropriate.	\$ 37,225.00	7/1/2025-6/30/2026	19 in Workshops / 11 Completed
US Bank SCOPE: Funding to provide disconnected individuals who may not be eligible for WIOA Funds to access the broader workforce system through referrals, job readiness, vocational training, work experience, employment assistance and wrap around services. Additional activities may include childcare training and entrepreneurship opportunities that are outside the scope of the local board's priority industries and eligible training list.	\$ 25,000.00	08/01/2025-7/31/2026	Pending Enrollments
CDBG - In Home Child Care Pilot Project SCOPE: Funding will provide scholarships to low -income, underserved residents to participate in a 12-week on-line training program for home-based childcare entrepreneurs, offered through Nurture, a 501(c)3 and Community Development Financial Institution. Participants who successfully complete the program will result in a CA State License to become an in-home day care provider with the opportunity to access start-up capital upon completion.	\$ 18,446.20	2024-2025	Pending Contract
Department of Public Health Resilience Center SCOPE: Funding to provide guidance and technical support for green workforce development and disaster preparedness and recovery.	\$ 71,450.00	9/30/2025-1/31/2027	N/A
James Irvine Foundation SCOPE: Funds will provide the support needed to develop a marketing plan to expand our reach, tell "our story", and elevate the narrative of Madera County as the place to live and work and raise a family. Activities will include a comprehensive marketing assessment, logo redesign, and purchase of a mobile unit. Received an additional \$30,000.00 to support marketing implementation activities.	\$ 496,889.00	9/2024-9/2026	N/A
Madera County Superintendent of Schools SCOPE: Funding to provide Summer PWEX program to prepare and place 15 foster youth homeless students in a paid work experience worksite that will provide students with hands-on job skills and knowledge required for various occupations of interest. This project completed July 31, 2025.	\$ 76,611.00	4/23/2025-7/31/2025	15 Served
California Jobs First Economic Development Pilot Grant SCOPE: Funding to work with employer(s) and training provider(s) to train 17 individuals as bus drivers and provide job search/job placement assistance. Individuals participating will also receive case management support. In addition, funding can support other training offered on the Eligible Training Provider List.	\$ 200,000.00	2/13/25-9/30/2025	13 Served
SS Ticket-toWork Contract SCOPE: Provide employment and training support to SSI/SSDI beneficiaries.	\$ 10,480.00	Open Ended	6 Tickets Assigned

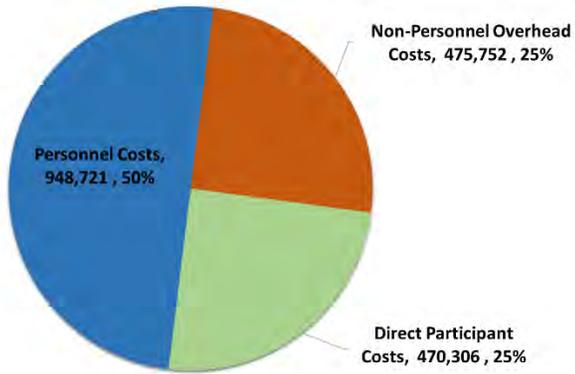
Note: Amount above only reflects ticket holders who have entered milestone payments.
Payments from SS tend to be 2-3 Qrts behind.

Program Expenditure Information:

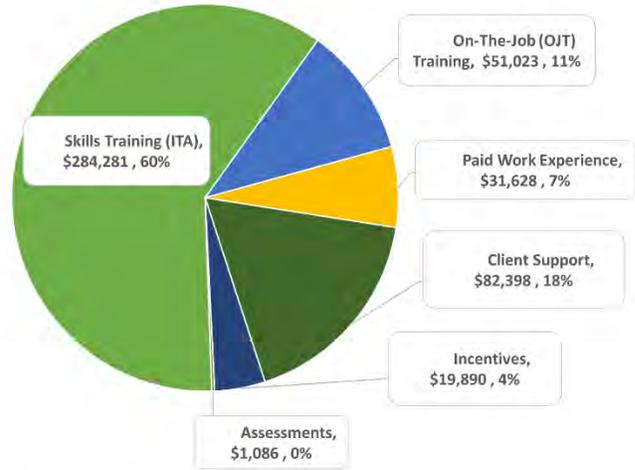
Below charts and graphs reflect data for all projects operated by MCWIC. Any chart that specifies WIOA, is only reflecting WIOA formula activity.



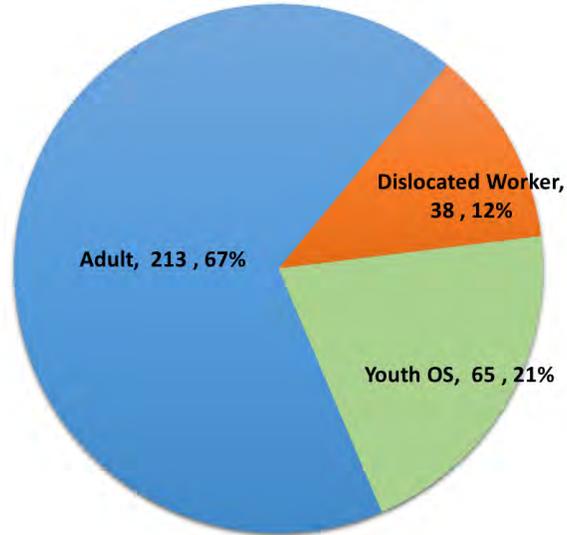
Total Operating Expenses as of 12/31/2025
Total \$1,894,778



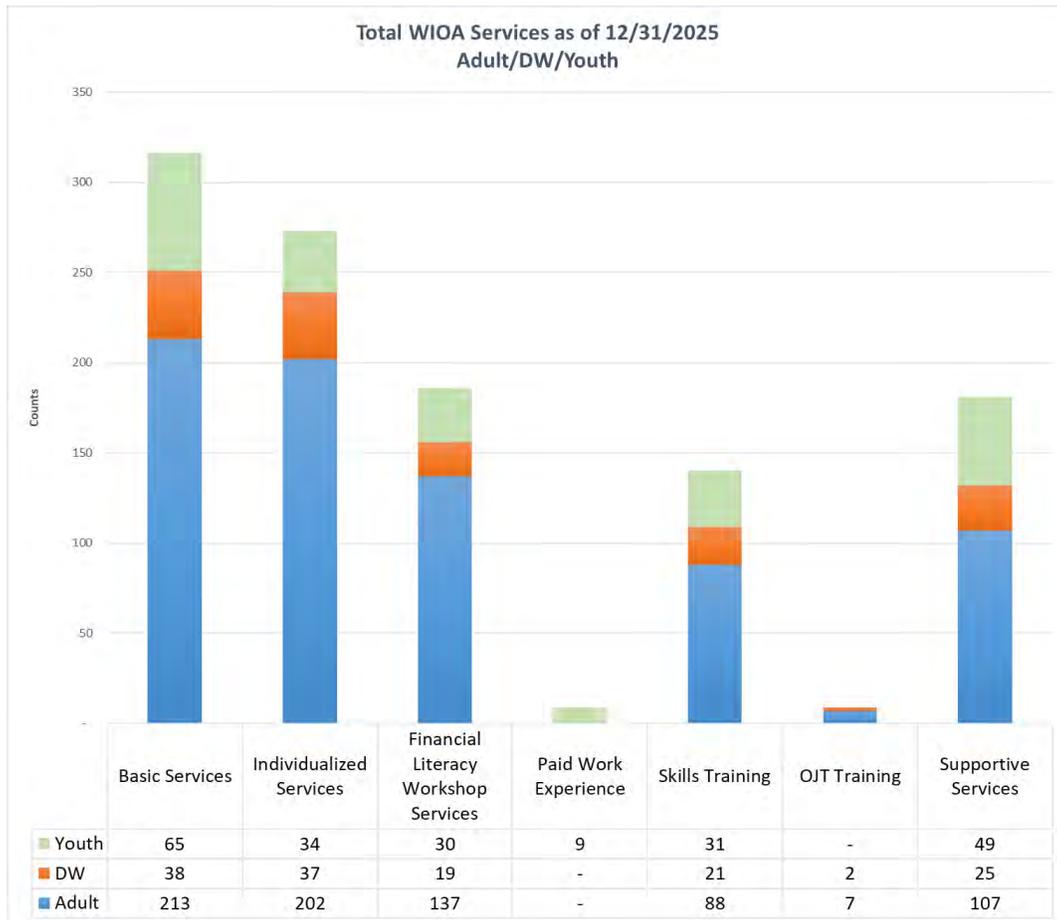
Direct Participant Expenses as of 12/31/2025
Total \$470,306



Total WIOA Enrollments as of 12/31/2025
Adult/DW/Youth



Note: Enrollment Chart includes co-enrollments



Note: Supportive Services mileage reimbursement count is per payment (semi-monthly)

The chart below displays the occupations for which clients have enrolled in training services for this fiscal year to 12/31/2025. The counts do not include active carry-in active numbers that roll from 6/30/25 to 7/1/25. Training services include Individual Training Accounts (ITA), On-the-Job Training (OJT), Transitional Job Training (TJT), Incumbent Worker Training (IWT), and Work Experience (WEX). All training determinations are based on an individual's service/employment plan as well as verifying current demand for the occupation resulting from the specific training. Services provided to individuals are to develop the right skills for today's labor market and to also provide a clear career path for those entering or re-entering the labor market.

O'Net	Sum of Total	# of Requests
53-3032 Heavy and Tractor-Trailer Truck Drivers	\$ 128,591	53
53-3051.00 School Bus Drivers	\$ 148,223	24
31-0000 Healthcare Support Occupations	\$ 27,349	23
29-0000 Healthcare Practitioners and Technical Occupations	\$ 95,397	21
49-9071.00 Maintenance and Repair Workers	\$ 54,850	14
33-0000 Protective Service Occupations	\$ 47,902	13
51-4121 Welders	\$ 37,496	12
43-0000 Office and Administrative Support Occupations	\$ 33,327	10
47-2111.00 Electricians	\$ 39,845	9
41-0000 Sales and Related Occupations	\$ 49,081	8
49-9041-00 Industrial Machinery Mechanices	\$ 23,675	4
Grand Total	\$ 685,734	191



**WORKFORCE DEVELOPMENT
BOARD OF MADERA COUNTY**

Agenda Item 8.10

Consent Action Information

To: Workforce Development Board of Madera County
From: Maiknue Vang
Date: February 19, 2026
Subject: Mountain Community and Madera County Job Fairs

Information:

The Mountain Community job fair will be held on Thursday, March 19, 2026, from 2-6pm, at the Oakhurst Community Center. The Madera job fair will be held on Thursday, April 2, from 10am-2pm, at the Madera County Fairgrounds – Hatfield Hall.

For more information, please contact:

- Job Seekers: 559-662-4500
- Employers: 559-662-4540

Financing:

Workforce Innovation and Opportunity Act

2026 MOUNTAIN COMMUNITY JOB FAIR



WORKFORCE DEVELOPMENT
BOARD OF MADERA COUNTY



WORKFORCE
ASSISTANCE
CENTER



Oakhurst Community Center
39800 Road 425B Oakhurst, CA



Time
2:00 - 6:00 PM



Thursday
March 19, 2026



Be Prepared To:

Introduce Yourself in 45
Seconds

Provide Copies of Your
Resume

Dress to Impress

Interview on the Spot



**For More Information,
Contact Us: (559) 662-4500**

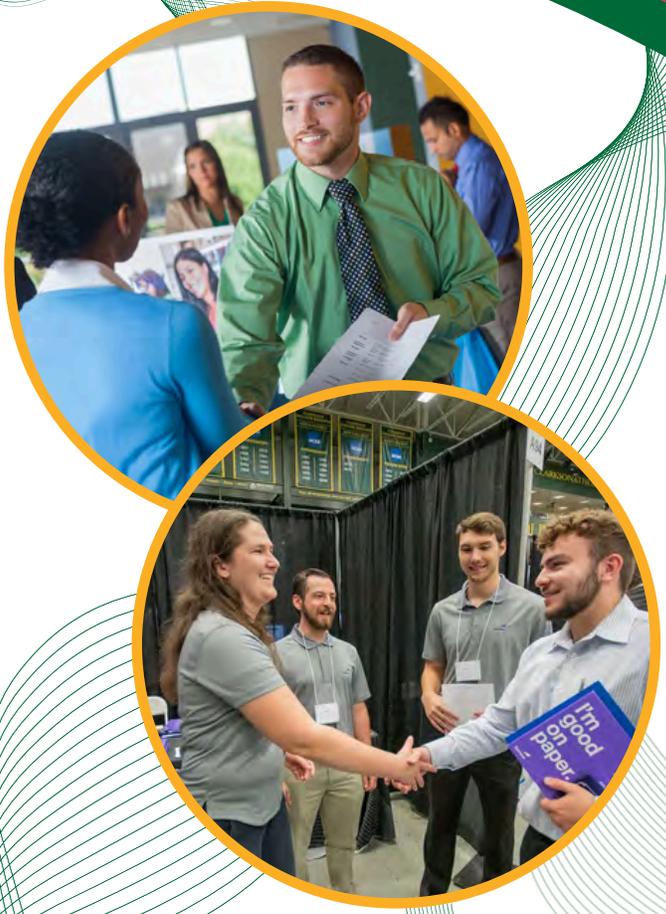
APRIL 2, 2026 MADERA COUNTY

JOB FAIR

Madera Fairgrounds - Hatfield Hall
1850 W. Cleveland Ave, Madera, CA

10AM - 2PM

AGENDA ITEM 8.10



- ✦ Open to all job seekers
- ✦ Many positions available
- ✦ Interviews on the spot
- ✦ Caljobs account needed to check in

If you don't have a Caljobs account, create one at [Caljobs.ca.gov](https://www.caljobs.ca.gov)



For more information,
Contact: (559)662-4500

- Bring copies of your resume
- Dress to impress
- Come interview ready

This project is fully funded by a US Department of Labor Workforce Innovation and Opportunity Act (WIOA) grant allocation totaling \$2,379,746 and is an Equal Opportunity Employer/Program. Auxiliary aids and services available upon request to individuals with disabilities.



**WORKFORCE DEVELOPMENT
BOARD OF MADERA COUNTY**

Agenda Item 8.11

Consent

Action

Information

To: Workforce Development Board of Madera County

From: Maiknue Vang

Date: February 19, 2026

Subject: High Performing Board Notice

Information:

The State issued a final directive to local areas regarding the application for High Performing Board designation on January 23, 2026. The guidance includes a deadline of March 2, 2026, for submission of the application and supporting materials. High Performing Board criteria include successful performance, approved Regional and Local Plans, training expenditures met, Youth funding requirement met, and a business services plan in place. Staff will be completing and submitting an application.

The High Performing Board directive is attached for your information.

Financing:

Workforce Innovation and Opportunity Act



Directive

Date: January 23, 2026

Number: WSD25-01



High Performing Boards

Executive Summary

This policy provides the guidance and establishes the procedures regarding the criteria Local Workforce Development Boards (Local Board) must meet to be certified as a High Performing Board and the procedures for certification/recertification. This policy applies to all Local Boards and is effective immediately.

This policy restates applicable legal requirements.

This Directive finalizes Workforce Services Draft Directive *High Performing Boards* WSDD-269, issued for comment on November 3, 2025. The Workforce Development Community submitted no comments during the draft comment period.

This policy supersedes Workforce Services Directive *High Performing Boards* (WSD22-11), dated April 27, 2023. Retain this Directive until further notice.

References

-
- *Workforce Innovation and Opportunity Act* (WIOA) (Public Law 113-128), Section 107, Section 108, and Section 129
 - *California Unemployment Insurance Code* (CUIC) Section 14200 and Section 14211
 - [Workforce Services Directive](#) WSD24-09, *Regional and Local Plans Guidance for PY 2025-28* (December 20, 2024)
 - WSD20-02, *Calculating Local Area Performance and Nonperformance* (September 18, 2020)
 - WSD18-10, *WIOA Training Expenditure Requirement* (January 31, 2019)
 - WSD17-07, *WIOA Youth Program Requirements* (January 16, 2018)

Background

As set forth in WIOA Section 107, Local Boards are established by the Governor in each Local Workforce Development Area (Local Area) of the state to carry out specific functions. These functions include developing a Local Workforce Development Plan, carrying out analyses of the economic conditions in the region and other workforce and regional labor market research and analysis, convening local workforce system stakeholders, engaging regional employers, and leading efforts to develop and implement career pathways within the Local Area.

This Directive outlines the statutory criteria and associated deliverables that Local Boards must provide to be considered a High Performing Board.

Policy and Procedures

CUIC Section 14200 states the minimum criteria a Local Board must meet to be certified as a High Performing Board:

- Meeting or exceeding negotiated performance goals for all measures in the three federal WIOA customer groups: adults, dislocated workers, and youth.
- Developing and implementing local policies and local strategic plans that meet the criteria outlined by both WIOA and California’s Unified Strategic Workforce Development Plan.
- Demonstrating a Local Board’s strategic plan involves the following:
 - Key stakeholders, including major employers and industry groups in the relevant regional economy, and organized labor.
 - The entire workforce training pipeline for the relevant regional economy, including K-12 education, career technical education, the community college system, and other postsecondary institutions.
 - Data-driven policies and processes; policy decisions at the local level should be evidence-based and use labor market data to develop and implement the Local Plan.
- Demonstrating investment in workforce initiatives, including training programs that promote skills development and career ladders relevant to the needs of each Local Area’s regional labor market and high-wage industry sectors.
- Establishing a youth strategy aligned with the needs of each workforce investment area’s regional labor market and high-wage industry sectors.
- Establishing a business service plan that integrates local business involvement with workforce initiatives.

According to CUIC Section 14200(c), recertification of High Performing Boards must occur midway through implementing the local and regional plans. CUIC Section 14200(h) directs the Governor and the Legislature, as part of the annual budget process and in consultation with the

CWDB, to annually reserve a portion of the WIOA 15 percent discretionary funds for the purpose of providing incentive funds to Local Boards certified as High Performing Boards. For program year (PY) 2024-25, \$100,000 was reserved to be divided equally among all those Local Boards identified as a High Performing Board.

Note – The annual reserve amount may fluctuate in future years depending on the Governor’s and the Legislature’s priorities.

High Performing Board Criteria

The following statutory criteria will be used to determine the certification of a Local Board as a High Performing Board:

1. Performed Successfully

The Local Area has an Individual Indicator Score of 50 percent or higher in PY 23-24, as described in WSD 20-02, for the following primary indicators of performance:

- 2nd Quarter After Exit
- 4th Quarter After Exit
- Median Earnings
- Credential Attainment Rate¹

Deliverable – The Local Board met the above definition of Performed Successfully, also outlined in WSD20-02, for PY 23-24.

2. Approved Regional and Local Plan

As required by WIOA Section 108 and outlined in WSD24-09, a biennial update of Regional and Local Plans is required to ensure plans remain current and account for changes in the labor market and economic conditions or in other factors affecting implementation.

Deliverable – The Local Board met the requirements in WIOA Section 108, outlined in WSD24-09, and received approval letters for their Regional and Local Plan modifications.

3. WIOA Training Expenditure Requirement

As required by CUIC Section 14211(a)(2), and outlined in WSD18-10, Local Boards must spend at least 30 percent of the combined total of their adult and dislocated workers’ WIOA formula fund allocation on training services each prior year. CUIC Section 14211(b)(1) allows Local Boards to use twelve categories of leveraged funds to receive a credit of up to 10 percent toward meeting their training expenditure requirement.

¹ [Training and Employment Notice \(TEN\) 04-23](#) and [TEN 04-24](#).

Deliverable – The Local Board met the WIOA training expenditure requirements in CUIIC Section 14211, and outlined in WSD18-10, for PY 23-24.

4. WIOA Youth Funding Requirement

As required by WIOA Section 129, and outlined in WSD17-07, Local Area must spend at least 75 percent of their WIOA youth formula allocation on youth workforce investment activities for out-of-school youth (OSY). Local Areas must also spend at least 20 percent of their WIOA youth formula allocation on work experience.

Note – Local Boards approved for the 50 percent WIOA OSY Expenditure waiver and that served systems- involved In School Youth (ISY) populations targeted by the waiver (e.g., foster care, homeless, and justice involved) during PY 23-24 will still be considered for High Performing Boards certification.

Deliverable – The Local Board met the OSY and work experience expenditure requirements in WIOA Section 129, also outlined in WSD17-07, for PY 23-24 or utilized the WIOA OSY Expenditure waiver to serve systems-involved youth (as defined) during PY 23-24.

5. Business Services Plan

CUIIC 14200(c)(9) specifies that each Local Board must establish a business service plan that integrates local business involvement with workforce initiatives. At a minimum, the plan must address the Local Board’s efforts to partner with businesses and labor locally and regionally, the utilization of an electronic system for business and job seekers to communicate about job opportunities, and the establishment of a subcommittee or workgroup comprised of business representatives.

Deliverable – A narrative that describes how the Local Board meets the business service plan criteria in CUIIC Section 14200.

High Performing Board Application Process

Pursuant to CUIIC Section 14200, Local Boards that submit a completed High Performing Board Application (Attachment 1) and meet all associated deliverables will receive certification as a High Performing Board.

The completed application and all necessary attachments must be submitted electronically to PolicyUnit@cwdb.ca.gov no later than **5 p.m. (PST) on Monday, March 2, 2026**.

Assessment of the Application

Pursuant to CUIIC 14200(b), the CWDB, in coordination with the Employment Development Department (EDD), will verify the information provided in the High Performing Board application and notify the local Chief Elected Official regarding their approval or denial.

Action

Bring this Directive to the attention of the local Chief Elected Official, Local Board, and appropriate staff.

Inquiries

If you have any questions, contact the CWDB Policy Unit at PolicyUnit@cwdb.ca.gov.

/s/ JAVIER ROMERO, Deputy Director
Workforce Services Branch

Attachment:

1. [High Performing Boards Application \(DOCX\)](#)

The EDD is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities.



**WORKFORCE DEVELOPMENT
BOARD OF MADERA COUNTY**

Agenda Item 8.12

Consent Action Information

To: Workforce Development Board of Madera County
From: Maiknue Vang, Executive Director
Date: February 19, 2026
Subject: Unemployment Insurance (UI) Claim Information

Information:

The most recent data on UI Claims for the period of December 13, 2025, through February 7, 2026, for Madera County is being provided for the WDB's review.

Financing:

Workforce Innovation and Opportunity Act

California Unemployment Industry & Demographics Data Dashboard

(Dashboard appears better when viewed in full screen mode. Click the icon in the bottom right-hand corner of screen next to download icon.)

About This Tool	County Claims	County Demographics	County Industry	Statewide Demographics	Statewide Industry
-----------------	----------------------	---------------------	-----------------	------------------------	--------------------

Weekly Initial Claims by County

County	December 2025			January 2026				February 2026	
	(Week Ending)			(Week Ending)				(Week Ending)	
	13	20	27	3	10	17	24	31	7
Madera	307	341	277	306	385	329	269	279	252

- Claim Type
 - UI Claims
 - PUA Claims
- County
 - Madera
- Claims by Y.. Multipl..
- Claims by Week (Sele.. Multiple values

The data provided in these reports are the number of initial claim counts. It includes new claims, additional claims, and transitional claims. Data includes regular Unemployment Insurance program and federal extended benefit programs. Data for claimants who live outside of California, but collect benefits, and invalid addresses in California are not included in these numbers.

- A new claim is the first claim for a benefit year period (for the regular UI program it is 52 weeks). You can only have one new claim during a benefit year period.
- An additional claim is when a second claim is filed during the same benefit year and there is intervening work between the current claim and the previous claim. For example, an individual files a new claim, goes back to work, gets laid off and files another claim before the benefit year period of the first claim expires. An individual can have multiple additional claims during the same benefit year if individual you meet the eligibility requirements.
- A transitional claim is when a claimant is still collecting benefits at the end of their benefit year period and had sufficient wage earnings during that year to begin a new claim once the first benefit year period ends.



Agenda Item 8.13

Consent Action Information

To: Workforce Development Board of Madera County
From: Maiknue Vang, Executive Director
Date: February 19, 2026
Subject: Form 700 Due April 1, 2026

Information:

The Form 700, Statement of Economic Interests is required by the Fair Political Practices Commission of any persons who sit on a Board that provides oversight to any agency receiving public funds and must be submitted annually by April 1 of each year. Staff are available to provide an orientation and information and assistance if there are any questions or concerns about the completion of this form. Further information as well as the Form itself can be found at <http://www.fppc.ca.gov/Form700.html>.

The Form 700 is also included in the agenda packet.

Financing:

Workforce Innovation and Opportunity Act

2025-2026 Statement of Economic Interests



Form 700

A Public Document

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 What to Know p.3
 Types of Statements..... p.5
 Cover Page and Schedules
 Cover Page p.6
 Schedule A-1 (*Investments*)..... p.8
 Schedule A-2 (*Business Entities/Trusts*) p.10
 Schedule B (*Real Property*) p.12
 Schedule C (*Income*) p.14
 Schedule D (*Gifts*)..... p.16
 Schedule E (*Travel Payments*)..... p.18
 Restrictions and Prohibitions..... p.20
 Q & A p.21

Helpful Resources

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

California Fair Political Practices Commission

1102 Q Street, Suite 3050 • Sacramento, CA 95811

Email Advice: advice@fppc.ca.gov

Toll-free advice line: 1 (866) ASK-FPPC • 1 (866) 275-3772

Telephone: (916) 322-5660 • Website: www.fppc.ca.gov

December 2025

Quick Start Guide
Detailed instructions begin on page 3.

WHEN IS THE ANNUAL STATEMENT DUE?

- March 2 – Elected State Officers, Judges (Supreme, Appellate, Superior Court), Retired Judges, Pro Tem Judges, Court Commissioners, State Board and Commission members listed in Government Code Section 87200
- April 1 – Most other filers

WHERE DO I FILE?

Most people file the Form 700 with their agency. Certain filers are required to file electronically with the FPPC. (See next page). If you're not sure where to file your Form 700, contact your filing officer or the person who asked you to complete it.

ITEMS TO NOTE!

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

NOTHING TO REPORT?

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

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

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

QUESTIONS?

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

E-FILING ISSUES?

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

What to Know

What's New

Gift Limit Increase

The gift limit increased to **\$630** for calendar years **2025** and **2026**. The gift limit in calendar year 2024 was \$590.

Required Electronic Filing for FPPC (Section 87500) Filers

Certain candidates and officials specified in Section 87500 are now required to file their Form 700 electronically using the FPPC's e-filing system. Filers for the offices listed under Section 87500 should contact the FPPC at form700@fppc.ca.gov to obtain their login and password information.

Reporting Prospective Employment

Effective January 1, 2026, Section 87200 Filers must report any arrangement for prospective employment on attachment Form 700-P. Attachment Form 700-P is filed electronically via the FPPC's e-filing portal. (See Reference Pamphlet, page 16, for more information.)

Who must file:

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

Exception:

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

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

Where to file:

Code Filers — State and Local Officials, Employees, and Consultants Designated in a Conflict of Interest Code:

File with your agency, board, or commission unless otherwise specified in your agency's code (e.g., Legislative staff files directly with FPPC). In most cases, the agency, board, or commission will retain the statements.

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

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

Multi-County Agencies, Boards, Commissions: File with your agency, board, or commission unless otherwise specified in your agency's code. Please review your agency's conflict of interest code as some multi-county offices are required to file electronically with the FPPC. In most cases, the agency, board, or commission will retain the statements.

87200 State Filers, for offices not specified in Section 87500, file as follows: File with your agency, board, or commission unless otherwise specified in your agency's code. Please review your agency's conflict of interest code as some 87200 state offices are required to file electronically with the FPPC. In most cases, the agency, board, or commission will retain the statements.

87200.5 Filers — Groundwater Sustainability Agency:

Members of the Board of Directors and Executives (e.g., Executive Director, General Manager, or other equivalent position) file electronically with the FPPC.

Officials and Candidates Specified in Section 87500, FPPC

Filers: The Act requires that the following officeholders and candidates for the positions listed below file electronically using the FPPC's e-filing system.

- Statewide elected officers and candidates for statewide elective office. (For a complete list of statewide elected officers please see Reference Pamphlet, Page 6.)
- Members and candidates for the Legislature and State Board of Equalization
- Designated employees of the Legislature directed to file with the FPPC by the house of the Legislature by which they are employed
- Members of the Public Utilities Commission, State Energy Resources Conservation and Development Commission, or California Coastal Commission
- Members of a state licensing or regulatory board, bureau, or commission
- Members of the Fair Political Practices Commission
- Appointed members to a state board, commission, or similar multimember body of the state if the FPPC has been designated as the filing officer in the conflict of interest code of the respective board, commission, or body. (Please contact your agency for a copy of your agency's conflict of interest code.)
- Designated employees of more than one joint powers insurance agency who elect to file a multiagency statement pursuant to Section 87350
- Judges (Supreme, Appellate, Superior Court), Retired Judges, Pro Tem Judges, court commissioners, or candidates for judge
- Officeholder or candidate for the office of district attorney, county counsel, county treasurer, or county board of supervisors
- Officeholder or candidate for the office of city council member, city treasurer, city attorney, or mayor
- County chief administrative officer, city manager, or if there is no city manager, the chief administrative officer
- County or city planning commissioner
- Head of a local government agency or member of a local government board or commission, if the FPPC has been designated as the filing officer in the conflict of interest code of the respective agency, board, or commission. (Please contact your agency for a copy of your agency's conflict of interest code.)
- A public official who manages public investments

Candidates, for offices not listed in Section 87500 above, file as follows:

- County offices (e.g., candidates running for local elective office that are designated in a conflict of interest code): File with your county elections official.
- City offices (e.g., candidates running for local elective office that are designated in a conflict of interest code): File with your City Clerk.
- Multi-county offices: File with your county elections official with whom you file your declaration of candidacy.

What to Know Continued

How to file:

The Form 700 is available at www.fppc.ca.gov. Additional PDF schedules of Form 700 are available on the FPPC's website. Form 700 schedules are also available in Excel format. Filers should always check with their filing officer to see if their agency requires a particular filing method. All statements are signed under penalty of perjury and must be verified by the filer. See Regulation 18723.1(c) for filing instructions for copies of expanded statements. Depending on your agency's requirements, statements can be required to be filed in the following formats:

Wet Signature ➤ Each Statement must have a handwritten "wet" signature. Wet signature statements can be filed either by hand delivery or mail.

Digital Signature ➤ Each statement must be signed with a verified digital signature via the filer's agency email address *if permitted by the filing officer*. The statement must be sent by email as a PDF with the digital signature affixed to the document. (See Regulations 18104 and 18757, as well as FPPC's Filing with a Digital Signature Fact Sheet for additional guidance).

Electronic Signature ➤ Each statement must be signed with a secure electronic signature submitted using an approved electronic filing system. Filers must be duly authorized by their filing officer to file electronically under Government Code Section 87500.2.

When to file:

Annual Statements

➤ March 2, 2026

- Elected State Officers
- Judges (Supreme, Appellate, Superior Court), Retired Judges, Pro Tem Judges, and Court Commissioners
- State Board and State Commission Members listed in Government Code Section 87200

➤ April 1, 2026

- Most other filers

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

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

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

Assuming Office and Leaving Office Statements

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

Exception:

If you assumed office between October 1, 2025, and December 31, 2025, and filed an assuming office statement, you are not required to file an annual statement until March 1, 2027, or April 1, 2027, whichever is applicable. The annual statement will cover the day after you assumed office through December 31, 2026. (See Reference Pamphlet, page 7, for additional exceptions.)

Candidate Statements

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

Certain candidates listed in Government Code Section 87500, FPPC Filers, are required to file their candidate statement electronically via the FPPC's e-filing system. Please refer to Page 3, Where to File section, for the list of offices required to file electronically with FPPC. Filers for the offices listed under Section 87500 should contact the FPPC at form700@fppc.ca.gov to obtain their login and password information.

Late Statements

There is no provision for filing deadline extensions unless the filer is serving in active military duty. (See page 20 for information on penalties and fines.)

Amendments

Statements may be amended at any time. You are only required to amend the schedule that needs to be revised. It is not necessary to amend the entire filed form. The amended schedule(s) is attached to your original filed statement. Obtain amendment schedules at www.fppc.ca.gov. Filers authorized to file electronically amend their statements using their agency's electronic filing system. *Note:* If you are a candidate or officeholder listed under Government Code Section 87500, FPPC Filers, then you must amend your statements electronically using the FPPC's e-filing system.

Types of Statements

Assuming Office Statement:

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

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

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

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

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

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

Annual Statement:

Generally, the period covered is January 1, 2025, through December 31, 2025. If the period covered by the statement is different than January 1, 2025, through December 31, 2025, (for example, you assumed office between October 1, 2024, and December 31, 2024 or you are combining statements), you must specify the period covered.

- Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement must be reported. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2025.
- If your disclosure category changes during a reporting period, disclose under the old category until the effective date of the conflict of interest code amendment and disclose under the new disclosure category through the end of the reporting period.

Leaving Office Statement:

Generally, the period covered is January 1, 2025, through the date you stopped performing the duties of your position. If the period covered differs from January 1, 2025, through the date you stopped performing the duties of your position (for example, you assumed office between October 1, 2024, and December 31, 2024, or you are combining statements), the period covered must be specified. The reporting period can cover parts of two calendar years.

- Report: Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2025.

Candidate Statement:

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

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

Amendments:

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

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

Expanded Statement:

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

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

Please type or print in ink.

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

1. Office, Agency, or Court

Agency Name *(Do not use acronyms)*

Division, Board, Department, District, if applicable Your Position

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

Agency: _____ Position: _____

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

- State
- Multi-County _____
- City of _____
- Judge (Supreme, Appellate, Superior Court), Retired Judge, Pro Tem Judge, or Court Commissioner (Statewide Jurisdiction)
- County of _____
- Other _____

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

- Annual:** The period covered is January 1, 2025, through December 31, 2025.
- Leaving Office:** Date Left ____/____/_____
(Check one circle below.)
- or-** The period covered is ____/____/_____, through December 31, 2025.
- The period covered is January 1, 2025, through the date of leaving office.
- Assuming Office:** Date assumed ____/____/_____
-or-
- The period covered is ____/____/_____, through the date of leaving office.
- Candidate:** Date of Election _____ and office sought, if different than Part 1: _____

4. Schedule Summary (required)

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

Schedules attached

- Schedule A-1 - Investments** – schedule attached
- Schedule A-2 - Investments** – schedule attached
- Schedule B - Real Property** – schedule attached
- Schedule C - Income, Loans, & Business Positions** – schedule attached
- Schedule D - Income – Gifts** – schedule attached
- Schedule E - Income – Gifts – Travel Payments** – schedule attached
- Attachment 700-P - Prospective Employment (87200 Filers Only)** – schedule attached

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

5. Verification

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

DAYTIME TELEPHONE NUMBER EMAIL ADDRESS
()

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

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

Date Signed _____
(month, day, year)

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

Instructions Cover Page

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

Part 1. Office, Agency, or Court

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

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

Example:

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

Part 2. Jurisdiction of Office

- Check the box indicating the jurisdiction of your agency and, if applicable, identify the jurisdiction. Judges, judicial candidates, and court commissioners have statewide jurisdiction. All other filers should review the Reference Pamphlet, page 14, to determine their jurisdiction.
- If your agency is a multi-county office, list each county in which your agency has jurisdiction.

- If your agency is not a state office, court, county office, city office, or multi-county office (e.g., school districts, special districts and JPAs), check the “other” box and enter the county or city in which the agency has jurisdiction.

Example:

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

1. Office, Agency, or Court	
Agency Name: <i>(Do not use acronyms)</i>	
Feather River Irrigation District	
Division, Board, Department, District, if applicable	Your Position
N/A	Board Member
▶ If filing for multiple positions, list below or on an attachment. <i>(Do not use acronyms)</i>	
Agency: N/A	Position:
2. Jurisdiction of Office <i>(Check at least one box)</i>	
<input type="checkbox"/> State	<input type="checkbox"/> Judge or Court Commissioner (Statewide Jurisdiction)
<input checked="" type="checkbox"/> Multi-County Yuba & Sutter Counties	<input type="checkbox"/> County of _____
<input type="checkbox"/> City of _____	<input type="checkbox"/> Other _____

Part 3. Type of Statement

Check at least one box. The period covered by a statement is determined by the type of statement you are filing. If you are completing a 2025 annual statement, **do not** change the pre-printed dates to reflect 2026. Your annual statement is used for reporting the **previous year's** economic interests. Economic interests for your annual filing covering January 1, 2026, through December 31, 2026, will be disclosed on your statement filed in 2027. See Reference Pamphlet, page 4.

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

Part 4. Schedule Summary

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

Part 5. Verification

Complete the verification by signing the statement and entering the date signed. Each statement must have an original “wet” signature unless filed with a secure electronic signature. (See page 4 above.) All statements must be signed under penalty of perjury and be verified by the filer pursuant to Government Code Section 81004. See Regulation 18723.1(c) for filing instructions for copies of expanded statements.

When you sign your statement, you are stating, under penalty of perjury, that it is true and correct. Only the filer has authority to sign the statement. An unsigned statement is not considered filed and you may be subject to late filing penalties.

SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

Name

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

\$2,000 - \$10,000 \$10,001 - \$100,000

\$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT

Stock Other _____ (Describe)

Partnership Income Received of \$0 - \$499

Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/25 ____/____/25

ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

\$2,000 - \$10,000 \$10,001 - \$100,000

\$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT

Stock Other _____ (Describe)

Partnership Income Received of \$0 - \$499

Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/25 ____/____/25

ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

\$2,000 - \$10,000 \$10,001 - \$100,000

\$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT

Stock Other _____ (Describe)

Partnership Income Received of \$0 - \$499

Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/25 ____/____/25

ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

\$2,000 - \$10,000 \$10,001 - \$100,000

\$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT

Stock Other _____ (Describe)

Partnership Income Received of \$0 - \$499

Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/25 ____/____/25

ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

\$2,000 - \$10,000 \$10,001 - \$100,000

\$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT

Stock Other _____ (Describe)

Partnership Income Received of \$0 - \$499

Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/25 ____/____/25

ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

\$2,000 - \$10,000 \$10,001 - \$100,000

\$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT

Stock Other _____ (Describe)

Partnership Income Received of \$0 - \$499

Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/25 ____/____/25

ACQUIRED DISPOSED

Comments: _____

Instructions – Schedules A-1 and A-2 Investments

“Investment” means a financial interest in any business entity (including a consulting business or other independent contracting business) that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency’s jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more at any time during the reporting period. (See Reference Pamphlet, page 14.)

Reportable investments include:

- Stocks, bonds, warrants, and options, including those held in margin or brokerage accounts and managed investment funds (See Reference Pamphlet, page 14.)
- Sole proprietorships
- Your own business or your spouse’s or registered domestic partner’s business (See Reference Pamphlet, page 9, for the definition of “business entity.”)
- Your spouse’s or registered domestic partner’s investments even if they are legally separate property
- Partnerships (e.g., a law firm or family farm)
- Investments in reportable business entities held in a retirement account (See Reference Pamphlet, page 16.)
- If you, your spouse or registered domestic partner, and dependent children together had a 10% or greater ownership interest in a business entity or trust (including a living trust), you must disclose investments held by the business entity or trust. (See Reference Pamphlet, page 17, for more information on disclosing trusts.)
- Business trusts

You are not required to disclose:

- Government bonds, diversified mutual funds, certain funds similar to diversified mutual funds (such as exchange traded funds) and investments held in certain retirement accounts. (See Reference Pamphlet, page 14.) (Regulation 18237)
- Bank accounts, savings accounts, money market accounts and certificates of deposits
- Cryptocurrency
- Insurance policies
- Annuities
- Commodities
- Shares in a credit union
- Government bonds (including municipal bonds)

Reminders

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

- Retirement accounts invested in non-reportable interests (e.g., insurance policies, mutual funds, or government bonds) (See Reference Pamphlet, page 16.)
- Government defined-benefit pension plans (such as CalPERS and CalSTRS plans)
- Certain interests held in a blind trust (See Reference Pamphlet, page 17.)

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

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

To Complete Schedule A-1:

Do not attach brokerage or financial statements.

- Disclose the name of the business entity. Do not use acronyms for the name of the business entity, unless it is one that is commonly understood by the public.
- Provide a general description of the business activity of the entity (e.g., pharmaceuticals, computers, automobile manufacturing, or communications).
- Check the box indicating the highest fair market value of your investment during the reporting period. If you are filing a candidate or an assuming office statement, indicate the fair market value on the filing date or the date you took office, respectively. (See page 21 for more information.)
- Identify the nature of your investment (e.g., stocks, warrants, options, or bonds).
- An acquired or disposed of date is only required if you initially acquired or entirely disposed of the investment interest during the reporting period. The date of a stock dividend reinvestment or partial disposal is not required. Generally, these dates will not apply if you are filing a candidate or an assuming office statement.

Examples:

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

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

SCHEDULE A-2

Investments, Income, and Assets of Business Entities/Trusts

(Ownership Interest is 10% or Greater)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name _____

▶ 1. BUSINESS ENTITY OR TRUST

Name _____

Address (Business Address Acceptable) _____

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

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE IF APPLICABLE, LIST DATE:

<input type="checkbox"/> \$0 - \$1,999 <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> ____/____/25 ACQUIRED </td> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> ____/____/25 DISPOSED </td> </tr> </table>	<input type="checkbox"/> ____/____/25 ACQUIRED	<input type="checkbox"/> ____/____/25 DISPOSED
<input type="checkbox"/> ____/____/25 ACQUIRED	<input type="checkbox"/> ____/____/25 DISPOSED		

NATURE OF INVESTMENT
 Partnership Sole Proprietorship _____ Other

YOUR BUSINESS POSITION _____

▶ 1. BUSINESS ENTITY OR TRUST

Name _____

Address (Business Address Acceptable) _____

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

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE IF APPLICABLE, LIST DATE:

<input type="checkbox"/> \$0 - \$1,999 <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> ____/____/25 ACQUIRED </td> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> ____/____/25 DISPOSED </td> </tr> </table>	<input type="checkbox"/> ____/____/25 ACQUIRED	<input type="checkbox"/> ____/____/25 DISPOSED
<input type="checkbox"/> ____/____/25 ACQUIRED	<input type="checkbox"/> ____/____/25 DISPOSED		

NATURE OF INVESTMENT
 Partnership Sole Proprietorship _____ Other

YOUR BUSINESS POSITION _____

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

<input type="checkbox"/> \$0 - \$499	<input type="checkbox"/> \$10,001 - \$100,000
<input type="checkbox"/> \$500 - \$1,000	<input type="checkbox"/> OVER \$100,000
<input type="checkbox"/> \$1,001 - \$10,000	

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

<input type="checkbox"/> \$0 - \$499	<input type="checkbox"/> \$10,001 - \$100,000
<input type="checkbox"/> \$500 - \$1,000	<input type="checkbox"/> OVER \$100,000
<input type="checkbox"/> \$1,001 - \$10,000	

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

None or Names listed below

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

None or Names listed below

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

Check one box:
 INVESTMENT REAL PROPERTY

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

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

FAIR MARKET VALUE IF APPLICABLE, LIST DATE:

<input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> ____/____/25 ACQUIRED </td> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> ____/____/25 DISPOSED </td> </tr> </table>	<input type="checkbox"/> ____/____/25 ACQUIRED	<input type="checkbox"/> ____/____/25 DISPOSED
<input type="checkbox"/> ____/____/25 ACQUIRED	<input type="checkbox"/> ____/____/25 DISPOSED		

NATURE OF INTEREST
 Property Ownership/Deed of Trust Stock Partnership

Leasehold _____ Yrs. remaining Other _____

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

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

Check one box:
 INVESTMENT REAL PROPERTY

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

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

FAIR MARKET VALUE IF APPLICABLE, LIST DATE:

<input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> ____/____/25 ACQUIRED </td> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> ____/____/25 DISPOSED </td> </tr> </table>	<input type="checkbox"/> ____/____/25 ACQUIRED	<input type="checkbox"/> ____/____/25 DISPOSED
<input type="checkbox"/> ____/____/25 ACQUIRED	<input type="checkbox"/> ____/____/25 DISPOSED		

NATURE OF INTEREST
 Property Ownership/Deed of Trust Stock Partnership

Leasehold _____ Yrs. remaining Other _____

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

Comments: _____

Instructions – Schedule A-2

Investments, Income, and Assets of Business Entities/Trusts

Use Schedule A-2 to report investments in a business entity (including a consulting business or other independent contracting business) or trust (including a living trust) in which you, your spouse or registered domestic partner, and your dependent children, together or separately, had a 10% or greater interest, totaling \$2,000 or more, during the reporting period and which is located in, doing business in, planning to do business in, or which has done business during the previous two years in your agency's jurisdiction. (See Reference Pamphlet, page 14.) A trust located outside your agency's jurisdiction is reportable if it holds assets that are located in or doing business in the jurisdiction. Do not report a trust that contains non-reportable interests. For example, a trust containing only your personal residence not used in whole or in part as a business, your savings account, and some municipal bonds, is not reportable.

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

To Complete Schedule A-2:

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

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

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

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

- Disclose each source of income and outstanding loan **to the business entity or trust** identified in Part 1 if your pro rata share of the **gross** income (including your community property interest in your spouse's or registered domestic partner's share) to the business entity or trust from that source was \$10,000 or more during the reporting period. (See Reference Pamphlet, page 12, for examples.) Income from governmental sources may be reportable if not considered salary. See Regulation 18232. Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.
- Disclose each individual or entity that was a source of commission income of \$10,000 or more during the reporting period through the business entity identified in Part 1. (See Reference Pamphlet, page 9.)

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

Mark "None" if you do not have any reportable \$10,000 sources of income to disclose. Phrases such as "various clients" or "not disclosing sources pursuant to attorney-client privilege" are not adequate disclosure. (See Reference Pamphlet, page 15, for information on procedures to request an exemption from disclosing privileged information.)

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

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

Instructions – Schedule B Interests in Real Property

Report interests in real property located in your agency's jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more any time during the reporting period. Real property is also considered to be "within the jurisdiction" of a local government agency if the property or any part of it is located within two miles outside the boundaries of the jurisdiction or within two miles of any land owned or used by the local government agency. (See Reference Pamphlet, page 14.)

Interests in real property include:

- An ownership interest (including a beneficial ownership interest)
- A deed of trust, easement, or option to acquire property
- A leasehold interest (See Reference Pamphlet, page 15.)
- A mining lease
- An interest in real property held in a retirement account (See Reference Pamphlet, page 16.)
- An interest in real property held by a business entity or trust in which you, your spouse or registered domestic partner, and your dependent children together had a 10% or greater ownership interest (Report on Schedule A-2.)
- Your spouse's or registered domestic partner's interests in real property that are legally held separately by him or her

You are not required to report:

- A residence, such as a home or vacation cabin, used exclusively as a personal residence (However, a residence in which you rent out a room or for which you claim a business deduction may be reportable. If reportable, report the fair market value of the portion claimed as a tax deduction.)
- Some interests in real property held through a blind trust (See Reference Pamphlet, page 17.)
 - **Please note:** A non-reportable property can still be grounds for a conflict of interest and may be disqualifying.

To Complete Schedule B:

- Report the precise location (e.g., an assessor's parcel number or address) of the real property.
- Check the box indicating the fair market value of your interest in the property (regardless of what you owe on the property).
- Enter the date acquired or disposed only if you initially acquired or entirely disposed of your interest in the property during the reporting period.
- Identify the nature of your interest. If it is a leasehold, disclose the number of years remaining on the lease.

Reminders

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

- If you received rental income, check the box indicating the gross amount you received.
- If you had a 10% or greater interest in real property and received rental income, list the name of the source(s) if your pro rata share of the gross income from any single tenant was \$10,000 or more during the reporting period. If you received a total of \$10,000 or more from two or more tenants acting in concert (in most cases, this will apply to married couples), disclose the first and last name of each tenant. Otherwise, mark "None."
- Loans from a private lender that total \$500 or more and are secured by real property may be reportable. **Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.**

When reporting a loan:

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

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

Example:

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

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

Instructions – Schedule C

Income, Loans, & Business Positions

(Income Other Than Gifts and Travel Payments)

Reporting Income:

Report the source and amount of gross income of \$500 or more you received during the reporting period. Gross income is the total amount of income before deducting expenses, losses, or taxes and includes loans other than loans from a commercial lending institution. (See Reference Pamphlet, page 12.) You must also report the source of income to your spouse or registered domestic partner if your community property share was \$500 or more during the reporting period.

The source and income must be reported only if the source is located in, doing business in, planning to do business in, or has done business during the previous two years in your agency's jurisdiction. (See Reference Pamphlet, page 14.) Reportable sources of income may be further limited by your disclosure category located in your agency's conflict of interest code.

Reporting Business Positions:

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

Commonly reportable income and loans include:

- Salary/wages, per diem, and reimbursement for expenses including travel payments provided by your employer
- Community property interest (50%) in your spouse's or registered domestic partner's income - **report the employer's name and all other required information**
- Income from investment interests, such as partnerships, reported on Schedule A-1
- Commission income not required to be reported on Schedule A-2 (See Reference Pamphlet, page 9.)
- Gross income from any sale, including the sale of a house or car (Report your pro rata share of the total sale price.)
- Rental income not required to be reported on Schedule B
- Prizes or awards not disclosed as gifts
- Payments received on loans you made to others
- An honorarium received prior to becoming a public official (See Reference Pamphlet, page 11.)
- Incentive compensation (See Reference Pamphlet, page 13.)

Reminders

- Code filers – your disclosure categories may not require disclosure of all sources of income.
- 87200 Filers – if reporting prospective employment, use attachment Form 700-P available on the FPPC's e-filing portal. Do not use Schedule C to report prospective employment.
- If you or your spouse or registered domestic partner are self-employed, report the business entity on Schedule A-2.
- Do not disclose on Schedule C income, loans, or business positions already reported on Schedules A-2 or B.

You are **not** required to report:

- Salary, reimbursement for expenses or per diem, or social security, disability, or other similar benefit payments received by you or your spouse or registered domestic partner from a federal, state, or local government agency.
- Stock dividends and income from the sale of stock unless the source can be identified.
- Income from a PERS retirement account.

(See Reference Pamphlet, page 13.)

To Complete Schedule C:

Part 1. Income Received/Business Position Disclosure

- Disclose the name and address of each source of income or each business entity with which you held a business position.
- Provide a general description of the business activity if the source is a business entity.
- Check the box indicating the amount of gross income received.
- Identify the consideration for which the income was received.
- For income from commission sales, check the box indicating the gross income received and list the name of each source of commission income of \$10,000 or more. (See Reference Pamphlet, page 9.) **Note: If you receive commission income on a regular basis or have an ownership interest of 10% or more, you must disclose the business entity and the income on Schedule A-2.**
- Disclose the job title or business position, if any, that you held with the business entity, even if you did not receive income during the reporting period.

Part 2. Loans Received or Outstanding During the Reporting Period

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

SCHEDULE D Income – Gifts

Name _____

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

Comments: _____

Instructions – Schedule D Income – Gifts

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

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

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

Commonly reportable gifts include:

- Tickets/passes to sporting or entertainment events
- Tickets/passes to amusement parks
- Parking passes not used for official agency business
- Food, beverages, and accommodations, including those provided in direct connection with your attendance at a convention, conference, meeting, social event, meal, or like gathering
- Rebates/discounts not made in the regular course of business to members of the public without regard to official status
- Wedding gifts (See Reference Pamphlet, page 17)
- An honorarium received prior to assuming office (You may report an honorarium as income on Schedule C, rather than as a gift on Schedule D, if you provided services of equal or greater value than the payment received. See Reference Pamphlet, page 11.)
- Transportation and lodging (See Schedule E.)
- Forgiveness of a loan received by you

Reminders

- Gifts from a single source are subject to a \$630 limit for calendar years 2025 and 2026. The gift limit in calendar year 2024 was \$590. (See Reference Pamphlet, page 11.)
- Code filers – you only need to report gifts from reportable sources.

You are not required to disclose:

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

To Complete Schedule D:

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

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

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

▶ NAME OF SOURCE *(Not an Acronym)* _____

ADDRESS *(Business Address Acceptable)* _____

CITY AND STATE _____

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

DATE(S): ___/___/___ - ___/___/___ AMT: \$ _____
(If gift)

▶ MUST CHECK ONE: Gift **-or-** Income

Made a Speech/Participated in a Panel

Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

▶ NAME OF SOURCE *(Not an Acronym)* _____

ADDRESS *(Business Address Acceptable)* _____

CITY AND STATE _____

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

DATE(S): ___/___/___ - ___/___/___ AMT: \$ _____
(If gift)

▶ MUST CHECK ONE: Gift **-or-** Income

Made a Speech/Participated in a Panel

Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

▶ NAME OF SOURCE *(Not an Acronym)* _____

ADDRESS *(Business Address Acceptable)* _____

CITY AND STATE _____

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

DATE(S): ___/___/___ - ___/___/___ AMT: \$ _____
(If gift)

▶ MUST CHECK ONE: Gift **-or-** Income

Made a Speech/Participated in a Panel

Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

▶ NAME OF SOURCE *(Not an Acronym)* _____

ADDRESS *(Business Address Acceptable)* _____

CITY AND STATE _____

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

DATE(S): ___/___/___ - ___/___/___ AMT: \$ _____
(If gift)

▶ MUST CHECK ONE: Gift **-or-** Income

Made a Speech/Participated in a Panel

Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

Comments: _____

Instructions – Schedule E Travel Payments, Advances, and Reimbursements

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

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

You are not required to disclose:

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

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

To Complete Schedule E:

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

When reporting travel payments that are gifts, you must provide a description of the gift, the **date(s)** received, and the **travel destination**.

- **Travel payments are income** if you provided services that were equal to or greater in value than the

payments received. You must disclose income totaling \$500 or more from a single source during the period covered by the statement. You have the burden of proving the payments are income rather than gifts. When reporting travel payments as income, you must describe the services you provided in exchange for the payment. You are not required to disclose the date(s) for travel payments that are income.

Example:

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

<small>▶ NAME OF SOURCE (Not an Acronym)</small>	
Health Services Trade Association	
<small>ADDRESS (Business Address Acceptable)</small>	
1230 K Street, Suite 610	
<small>CITY AND STATE</small>	
Sacramento, CA	
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE	
Association of Healthcare Workers	
<small>DATE(S):</small> ___/___/___ <small>(if gift)</small> <small>AMT: \$</small> 550.00	
<small>▶ MUST CHECK ONE:</small> <input type="checkbox"/> Gift <input checked="" type="checkbox"/> -or- <input checked="" type="checkbox"/> Income	
<input type="radio"/> Made a Speech/Participated in a Panel	
<input checked="" type="radio"/> Other - Provide Description <u>Travel reimbursement for board meeting.</u>	
<small>▶ If Gift, Provide Travel Destination</small> _____	

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

Example:

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

<small>▶ NAME OF SOURCE (Not an Acronym)</small>	
Chengdu Municipal People's Government	
<small>ADDRESS (Business Address Acceptable)</small>	
2 Caoshi St. CaoShiJie, Qingyang Qu, Chengdu Shi,	
<small>CITY AND STATE</small>	
Sichuan Sheng, China, 610000	
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE	
<small>DATE(S):</small> 09 / 04 / XX - 09 / 08 / XX <small>(if gift)</small> <small>AMT: \$</small> 3,874.38	
<small>▶ MUST CHECK ONE:</small> <input checked="" type="checkbox"/> Gift <input checked="" type="checkbox"/> -or- <input type="checkbox"/> Income	
<input type="radio"/> Made a Speech/Participated in a Panel	
<input checked="" type="radio"/> Other - Provide Description <u>Travel reimbursement for trip to China.</u>	
<small>▶ If Gift, Provide Travel Destination</small> <u>Sichuan Sheng, China</u>	

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

Restrictions and Prohibitions

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

Gift Prohibition

Gifts received by most state and local officials, employees, and candidates are subject to a limit. In 2025-2026, the gift limit increased to \$630 from a single source during a calendar year. The gift limit in calendar year 2024 was \$590.

Additionally, state officials, state candidates, and certain state employees are subject to a \$10 limit per calendar month on gifts from lobbyists and lobbying firms registered with the Secretary of State. See Reference Pamphlet, page 11.

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

Disqualification

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

Honorarium Ban

Most state and local officials, employees, and candidates are prohibited from accepting an honorarium for any speech given, article published, or attendance at a conference, convention, meeting, or like gathering. (See Reference Pamphlet, page 11.)

Loan Restrictions

Certain state and local officials are subject to restrictions on loans. (See Reference Pamphlet, page 15.)

Post-Governmental Employment

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

Late Filing

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

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

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

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

Form 700 is a Public Document Public Access Must Be Provided

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

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

General

- Q. What is the reporting period for disclosing interests on an assuming office statement or a candidate statement?
- A. On an assuming office statement, disclose all reportable investments, interests in real property, and business positions held on the date you assumed office. In addition, you must disclose income (including loans, gifts and travel payments) received during the 12 months prior to the date you assumed office.

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

- Q. I hold two other board positions in addition to my position with the county. Must I file three statements of economic interests?
- A. Yes, three are required. However, you may instead complete an expanded statement listing the county and the two boards on the Cover Page or an attachment as the agencies for which you will be filing. Disclose all reportable economic interests in all three jurisdictions on the expanded statement. File the expanded statement for your primary position providing an original “wet” signature unless filed with a secure electronic signature. (See page 4 above.) File copies of the expanded statement with the other two agencies as required by Regulation 18723.1(c). Remember to complete separate statements for positions that you leave or assume during the year.
- Q. I am a department head who recently began acting as city manager. Should I file as the city manager?
- A. Yes. File an assuming office statement as city manager. Persons serving as “acting,” “interim,” or “alternate” must file as if they hold the position because they are or may be performing the duties of the position.

- Q. My spouse and I are currently separated and in the process of obtaining a divorce. Must I still report my spouse’s income, investments, and interests in real property?
- A. Yes. A public official must continue to report a spouse’s economic interests until such time as dissolution of marriage proceedings is final. However, if a separate property agreement has been reached prior to that time, your estranged spouse’s income may not have to be reported. Contact the FPPC for more information.
- Q. As a designated employee, I left one state agency to work for another state agency. Must I file a leaving office statement?
- A. Yes. You may also need to file an assuming office statement for the new agency.

Investment Disclosure

- Q. I have an investment interest in shares of stock in a company that does not have an office in my jurisdiction. Must I still disclose my investment interest in this company?
- A. Probably. The definition of “doing business in the jurisdiction” is not limited to whether the business has an office or physical location in your jurisdiction. (See Reference Pamphlet, page 14.)
- Q. My spouse and I have a living trust. The trust holds rental property in my jurisdiction, our primary residence, and investments in diversified mutual funds. I have full disclosure. How is this trust disclosed?
- A. Disclose the name of the trust, the rental property and its income on Schedule A-2. Your primary residence and investments in diversified mutual funds registered with the SEC are not reportable.
- Q. I am required to report all investments. I have an IRA that contains stocks through an account managed by a brokerage firm. Must I disclose these stocks even though they are held in an IRA and I did not decide which stocks to purchase?
- A. Yes. Disclose on Schedule A-1 or A-2 any stock worth \$2,000 or more in a business entity located in or doing business in your jurisdiction.

Questions and Answers Continued

- Q. The value of my stock changed during the reporting period. How do I report the value of the stock?
- A. You are required to report the highest value that the stock reached during the reporting period. You may use your monthly statements to determine the highest value. You may also use the entity's website to determine the highest value. You are encouraged to keep a record of where you found the reported value. Note that for an assuming office statement, you must report the value of the stock on the date you assumed office.
- Q. I am the sole owner of my business, an S-Corporation. I believe that the nature of the business is such that it cannot be said to have any "fair market value" because it has no assets. I operate the corporation under an agreement with a large insurance company. My contract does not have resale value because of its nature as a personal services contract. Must I report the fair market value for my business on Schedule A-2 of the Form 700?
- A. Yes. Even if there are no *tangible* assets, intangible assets, such as relationships with companies and clients are commonly sold to qualified professionals. The "fair market value" is often quantified for other purposes, such as marital dissolutions or estate planning. In addition, the IRS presumes that "personal services corporations" have a fair market value. A professional "book of business" and the associated goodwill that generates income are not without a determinable value. The Form 700 does not require a precise fair market value; it is only necessary to check a box indicating the broad range within which the value falls.
- Q. I own stock in IBM and must report this investment on Schedule A-1. I initially purchased this stock in the early 1990s; however, I am constantly buying and selling shares. Must I note these dates in the "Acquired" and "Disposed" fields?
- A. No. You must only report dates in the "Acquired" or "Disposed" fields when, during the reporting period, you initially purchase a reportable investment worth \$2,000 or more or when you dispose of the entire investment. You are not required to track the partial trading of an investment.
- Q. On last year's filing I reported stock in Encoe valued at \$2,000 - \$10,000. Late last year the value of this stock fell below and remains at less than \$2,000. How should this be reported on this year's statement?
- A. You are not required to report an investment if the value was less than \$2,000 during the **entire** reporting period. However, because a disposed date is not required for stocks that fall below \$2,000, you may want to report the stock and note in the "comments" section that the value fell below \$2,000. This would be for informational purposes only; it is not a requirement.
- Q. We have a Section 529 account set up to save money for our son's college education. Is this reportable?
- A. If the Section 529 account contains reportable interests (e.g., common stock valued at \$2,000 or more), those interests are reportable (not the actual Section 529 account). If the account contains solely mutual funds, then nothing is reported.

Income Disclosure

- Q. I reported a business entity on Schedule A-2. Clients of my business are located in several states. Must I report all clients from whom my pro rata share of income is \$10,000 or more on Schedule A-2, Part 3?
- A. No, only the clients located in or doing business on a regular basis in your jurisdiction must be disclosed.
- Q. I believe I am not required to disclose the names of clients from whom my pro rata share of income is \$10,000 or more on Schedule A-2 because of their right to privacy. Is there an exception for reporting clients' names?
- A. Regulation 18740 provides a procedure for requesting an exemption to allow a client's name not to be disclosed if disclosure of the name would violate a legally recognized privilege under California or Federal law. This regulation may be obtained from our website at www.fppc.ca.gov. (See Reference Pamphlet, page 15.)

Questions and Answers Continued

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

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

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

A. Sources of income to a business in which you have an ownership interest of 10% or greater are disclosed on Schedule A-2. (See Reference Pamphlet, page 9.)

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

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

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

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

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

A. If your patients exercise sufficient control by selecting you instead of other doctors, then your patients, rather than their insurance carriers, are sources of income to you. (See Reference Pamphlet, page 15.)

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

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

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

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

Real Property Disclosure

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

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

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

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

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

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

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

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

Questions and Answers Continued

Gift Disclosure

- Q. If I received a reportable gift of two tickets to a concert valued at \$100 each, but gave the tickets to a friend because I could not attend the concert, do I have any reporting obligations?
- A. Yes. Since you accepted the gift and exercised discretion and control of the use of the tickets, you must disclose the gift on Schedule D.
- Q. Julia and Jared Benson, a married couple, want to give a piece of artwork to a county supervisor. Is each spouse considered a separate source for purposes of the gift limit and disclosure?
- A. Yes, each spouse may make a gift valued at the gift limit during a calendar year. For example, during 2025 the gift limit was \$630, so the Bensons may have given the supervisor artwork valued at no more than \$1,260. The supervisor must identify Jared and Julia Benson as the sources of the gift.
- Q. I am a Form 700 filer with full disclosure. Our agency holds a holiday raffle to raise funds for a local charity. I bought \$10 worth of raffle tickets and won a gift basket valued at \$120. The gift basket was donated by Doug Brewer, a citizen in our city. At the same event, I bought raffle tickets for, and won a quilt valued at \$70. The quilt was donated by a coworker. Are these reportable gifts?
- A. Because the gift basket was donated by an outside source (not an agency employee), you have received a reportable gift valued at \$110 (the value of the basket less the consideration paid). The source of the gift is Doug Brewer and the agency is disclosed as the intermediary. Because the quilt was donated by an employee of your agency, it is not a reportable gift.
- Q. My agency is responsible for disbursing grants. An applicant (501(c)(3) organization) met with agency employees to present its application. At this meeting, the applicant provided food and beverages. Would the food and beverages be considered gifts to the employees? These employees are designated in our agency's conflict of interest code and the applicant is a reportable source of income under the code.
- A. Yes. If the value of the food and beverages consumed by any one filer, plus any other gifts received from the same source during the reporting period total \$50 or more, the food and beverages would be reported using the fair market value and would be subject to the gift limit.
- Q. I received free admission to an educational conference related to my official duties. Part of the conference fees included a round of golf. Is the value of the golf considered informational material?
- A. No. The value of personal benefits, such as golf, attendance at a concert, or sporting event, are gifts subject to reporting and limits.