

# **AGENDA**

## **COVID-19 Meeting Notice**

**To address concerns relating to COVID-19, this meeting will be accessible by remote video conferencing, as authorized by Governor Newsom's Executive Order N-29-20.**

**Members of the public who wish to observe the meeting and/or offer public comment by video conferencing should contact the District at least 24 hours before the meeting at (805) 967-4519 or [RMangus@GoletaSanitary.org](mailto:RMangus@GoletaSanitary.org) to obtain the meeting ID and passcode.**

**Members of the public with disabilities who wish to request a reasonable modification or accommodation to observe the meeting and/or offer public comment should contact the District at least 24 hours before the meeting at the foregoing telephone number or email address for instructions on how to access the meeting.**

**A G E N D A**  
REGULAR MEETING OF THE GOVERNING BOARD  
OF THE GOLETA SANITARY DISTRICT  
A PUBLIC AGENCY

One William Moffett Place  
Goleta, California 93117

July 5, 2021

**CALL TO ORDER:** 6:30 p.m.

**ROLL CALL OF MEMBERS**

**BOARD MEMBERS:** Jerry D. Smith  
Steven T. Majoewsky  
George W. Emerson  
Sharon Rose  
Edward Fuller

**CONSIDERATION OF THE MINUTES OF THE BOARD MEETING**

The Board will consider approval of the Minutes of the Regular Meeting of June 21, 2021.

**PUBLIC COMMENTS** - Members of the public may address the Board on items within the jurisdiction of the Board.

**POSTING OF AGENDA** – The agenda notice for this meeting was posted at the main gate of the Goleta Sanitary District and on the District’s web site 72 hours in advance of the meeting.

**BUSINESS:**

1. CONSIDERATION OF UPCOMING ELECTION TO THE CALIFORNIA SPECIAL DISTRICTS ASSOCIATION (CSDA) BOARD OF DIRECTORS, COASTAL NETWORK SEAT A  
(Board may take action on this item.)
2. UPDATE AND DISCUSSION OF OUTREACH PLAN FOR TRANSITION TO DISTRICT-BASED ELECTIONS  
(Board may take action on this item.)
3. REVIEW AND CONSIDERATION OF 2021 ACTION PLAN  
(Board may take action on this item.)

4. CLOSED SESSION
  - A. PUBLIC COMMENTS ON CLOSED SESSION MATTER
  - B. CLOSED SESSION PURSUANT TO GOVERNMENT CODE SECTION 54957(b)(1)  
PUBLIC EMPLOYEE PERFORMANCE EVALUATION  
TITLE: GENERAL MANAGER
  - C. PUBLIC REPORT ON CLOSED SESSION MATTER
5. GENERAL MANAGER'S REPORT
6. LEGAL COUNSEL'S REPORT
7. COMMITTEE/DIRECTOR'S REPORTS AND APPROVAL/RATIFICATION OF DIRECTOR'S ACTIVITIES
8. PRESIDENT'S REPORT
9. ITEMS FOR FUTURE MEETINGS
10. CORRESPONDENCE  
(The Board will consider correspondence received by and sent by the District since the last Board Meeting.)
11. APPROVAL OF BOARD COMPENSATION AND EXPENSES AND RATIFICATION OF CLAIMS PAID BY THE DISTRICT  
(The Board will be asked to ratify claims.)

## **ADJOURNMENT**

***Any public records which are distributed less than 72 hours prior to this meeting to all, or a majority of all, of the District's Board members in connection with any agenda item (other than closed sessions) will be available for public inspection at the time of such distribution at the District's office located at One William Moffett Place, Goleta, California 93117.***

# MINUTES

**MINUTES**  
REGULAR MEETING OF THE GOVERNING BOARD  
GOLETA SANITARY DISTRICT  
A PUBLIC AGENCY  
DISTRICT OFFICE CONFERENCE ROOM  
ONE WILLIAM MOFFETT PLACE  
GOLETA, CALIFORNIA 93117

June 21, 2021

**CALL TO ORDER:** President Smith called the meeting to order at 6:31 p.m.

**BOARD MEMBERS PRESENT:** Jerry D. Smith, Steven T. Majoewsky, George W. Emerson, Sharon Rose, Edward Fuller

**BOARD MEMBERS ABSENT:** None

**STAFF MEMBERS PRESENT:** Steve Wagner, General Manager/District Engineer, Rob Mangus, Finance and Human Resources Manager/Board Secretary and Richard Battles, Legal Counsel from Howell Moore & Gough LLP.

**OTHERS PRESENT:** Larry Meyer, Director, Goleta West Sanitary District  
Tom Evans, Director, Goleta Water District

**APPROVAL OF MINUTES:** Director Majoewsky made a motion, seconded by Director Fuller, to approve the minutes of the Regular Board meeting of 06/07/21. The motion carried by the following vote:

(21/06/2206)

AYES: 5 Smith, Majoewsky, Emerson, Rose,  
Fuller

NOES: None

ABSENT: None

ABSTAIN: None

**POSTING OF AGENDA:** The agenda notice for this meeting was posted at the main gate of the Goleta Sanitary District and on the District's website 72 hours in advance of the meeting.

**PUBLIC COMMENTS:** None

**BUSINESS:**

1. **CONSIDERATION OF DISTRICT'S PROPOSED BUDGET FOR FISCAL YEAR 2021-22**  
Mr. Wagner and Mr. Mangus gave the staff report.

Director Rose made a motion, seconded by Director Emerson to approve and adopt the proposed budget for FY2021-22 as presented.

The motion carried by the following vote:

(21/06/2207)

AYES: 5 Smith, Majoewsky, Emerson, Rose, Fuller  
NOES: None  
ABSENT: None  
ABSTAIN: None

2. CONSIDERATION AND ADOPTION OF RESOLUTION NO. 21-665 APPROVING REVISED ORGANIZATION CHART AND EMPLOYEE PAY SCHEDULE

Mr. Wagner gave the staff report.

Director Fuller made a motion, seconded by Director Majoewsky to approve and adopt Resolution No. 21-665, updating the District's Organizational Chart and Employee Pay Schedule, for FY2021-22.

The motion carried by the following vote:

(21/06/2208)

AYES: 5 Smith, Majoewsky, Emerson, Rose, Fuller  
NOES: None  
ABSENT: None  
ABSTAIN: None

3. CONSIDERATION AND APPROVAL OF RESOLUTION ELECTING TO HAVE SEWER SERVICE CHARGES COLLECTED ON THE TAX ROLL FOR FISCAL YEAR 2021-22, DIRECTING THE PREPARATION AND FILING OF THE REPORT, FIXING TIME AND PLACE FOR HEARING, AND PROVIDING FOR NOTICE THEREOF

Mr. Wagner gave the staff report.

Director Fuller made a motion, seconded by Director Rose to approve and adopt Resolution No. 21-666 electing to have sewer service charges collected on the tax roll for fiscal year 2021-22 and directing the preparation and filing of the report and fixing the time and place for a public hearing and providing the notice thereof.

The motion carried by the following vote:

(21/06/2209)

AYES: 5 Smith, Majoewsky, Emerson, Rose, Fuller  
NOES: None

ABSENT: None  
ABSTAIN: None

4. DISCUSSION AND ACTION ON AUDIT SERVICES CONTRACT

Mr. Wagner gave the staff report.

Director Fuller made a motion, seconded by Director Majoewsky to engage Moss, Levy and Hartzheim for audit services for FY20-21 and direct the General Manager to execute the engagement letter.

The motion carried by the following vote:

(21/06/2210)

AYES: 5 Smith, Majoewsky, Emerson, Rose, Fuller  
NOES: None  
ABSENT: None  
ABSTAIN: None

5. GENERAL MANAGER'S REPORT

Mr. Wagner gave the report.

6. LEGAL COUNSEL'S REPORT

Mr. Battles reported on Governor Newsom's executive order from March, 2020 related to the Brown Act modifications that will still be in effective through September 30, 2021 and that there are draft Bills that will make some of the modifications permanent.

7. COMMITTEE/DIRECTORS' REPORTS AND APPROVAL/RATIFICATION OF DIRECTORS' ACTIVITIES

Director Rose – Reported on the upcoming meetings of the local chapter of CSDA.

Director Majoewsky – No report.

Director Emerson – Distributed a handout to the Board.

Director Fuller – Reported on the Goleta Water District meeting he attended.

8. PRESIDENT'S REPORT

President Smith – No report.

9. ITEMS FOR FUTURE MEETINGS

No Board action was taken to return with an item.

10. CORRESPONDENCE

The Board reviewed and discussed the list of correspondence to and from the District in the agenda.

11. APPROVAL OF BOARD COMPENSATION AND EXPENSES AND RATIFICATION OF CLAIMS PAID BY THE DISTRICT

Director Emerson made a motion, seconded by Director Majoewsky, to ratify and approve the claims, for the period 06/08/21 to 06/21/21 as follows:

Running Expense Fund #4640	\$ 316,053.35
Capital Reserve Fund #4650	\$ 78,749.25
Depreciation Replacement Reserve Fund #4655	\$ 39,347.43

The motion carried by the following vote:

(21/06/2211)

AYES:	5	Smith, Majoewsky, Emerson, Rose, Fuller
NOES:		None
ABSENT:		None
ABSTAIN:		None

**ADJOURNMENT**

There being no further business, the meeting was adjourned at 8:00 p.m.

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Jerry D. Smith  
Governing Board President

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Robert O. Mangus, Jr.  
Governing Board Secretary

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Steven T. Majoewsky

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George W. Emerson

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Sharon Rose

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Edward Fuller

# **AGENDA ITEM #1**

**AGENDA ITEM: 1**

**MEETING DATE: July 5, 2021**

**I. NATURE OF ITEM**

Consideration of Upcoming Election to the California Special Districts Association (CSDA) Board of Directors, Coastal Network Seat A

**II. BACKGROUND INFORMATION**

The District was notified of an upcoming election to the California Special Districts Association (CSDA) Board of Directors for the Coastal Network, Seat A. This year all voting for the CSDA Board of Directors will be done electronically through a web-based ballot portal.

The Directors of CSDA are elected from its six geographical networks. Each of the six networks has three seats on the Board with staggered 3-year terms. Candidates must be affiliated with an independent special district that is a CSDA regular member located within the geographic network that they seek to represent. The Goleta Sanitary District is in the Coastal network which stretches from San Mateo County to Ventura County.

The CSDA Board of Directors is the governing body responsible for all policy decisions related to CSDA's member services, legislative advocacy, education, and resources. Any Regular Member in good standing may run for a vacant Board seat in the network where their agency is located. The deadline for submitting an electronic ballot for the 2022-2024 CSDA Board Election is July 16, 2021 at 5:00 p.m.

Elaine Magner, the incumbent from the Pleasant Valley Recreation and Parks District, is seeking re-election, and Hugh Rafferty, a long-term member of the Santa Maria Public Airport District Board of Directors is also running. Additional information on the candidates is attached to this report.

**III. COMMENTS AND RECOMMENDATIONS**

The Board may wish to consider the attached information and direct the General Manager to submit an electronic ballot for one of the candidates.

**IV. REFERENCE MATERIALS**

CSDA Board of Directors Election Information and Candidate Statements

## Steve Wagner

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**From:** vote@simplyvoting.com on behalf of CSDA <vote@simplyvoting.com>  
**Sent:** Monday, June 7, 2021 9:01 AM  
**To:** Steve Wagner  
**Subject:** Reminder: CSDA 2021 Board of Directors Elections

**Follow Up Flag:** Follow up  
**Flag Status:** Flagged

Dear CSDA Member:

A link to an electronic CSDA Board of Directors election ballot is below for your district's use in voting to elect a representative to the CSDA Board of Directors in your Network for Seat A.

To vote, please visit: <https://CSDA.simplyvoting.com/>

Or follow this link to access the ballot directly:

<https://CSDA.simplyvoting.com/auth.php?e=D2999&mac=550a758a936a61ac698d>

Each of CSDA's six (6) networks has three seats on the Board and the candidates are either a board member or management-level employee of a member district located in your Network. Each Regular Member (district) in good standing shall be entitled to vote for one (1) person to represent its Network in Seat A.

Once logged in, you will see the candidates for CSDA Board Seat A in your Network as well as candidate information for each person who submitted the optional background information. Please vote for **only one** candidate to represent your Network in Seat A and be sure to fully complete all required fields and submit your vote. Unfortunately, if any part of the ballot is not complete, the ballot will not be valid and will not be counted.

**The deadline to complete your voting through the system is July 16, 2021 at 5:00 pm.**

If you have any questions or would like to request the ability to vote by hard-copy mail, please contact Amber Phelen at 916.442.7887 or [amberp@csda.net](mailto:amberp@csda.net)

Thank you!

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[Unsubscribe](#)



Home

How It Works

Logout **Steve Wagner**

**CSDA Board of Directors Election Ballot - Term 2022-2024; Seat A - Coastal Network**

**Please vote for your choice**

Choose **one** of the following candidates:

- Elaine Magner\*
- Hugh Rafferty

\*Incumbent

**Elaine Magner\***    [\[view details\]](#)

**Hugh Rafferty**    [\[view details\]](#)

Continue

Cancel



**California Special  
Districts Association**  
*Districts Stronger Together*

## 2021 CSDA BOARD CANDIDATE INFORMATION SHEET

The following information **MUST** accompany your nomination form and Resolution/minute order:

**Name:** Elaine Magner

**District/Company:** Pleasant Valley Recreation and Park District

**Title:** Board Director

**Elected/Appointed/Staff:** Elected

**Length of Service with District:** Since February 2008

**1. Do you have current involvement with CSDA (such as committees, events, workshops, conferences, Governance Academy, etc.):**

I currently serve on the CSDA Board of Directors as the Vice President. As the CSDA Vice President I serve on all CSDA committees. In the past I have been on the Fiscal, Audit, Elections and Bylaws, Membership and Professional Development and provide input to many of the CSDA Expert Feedback Teams including Human Resources and Personnel, Governance and Revenue Teams. Also I am one of the three CSDA board directors on the Special Districts Leadership Foundation (SDLF) and the CSDA representative on the SDLF Scholarship Committee.

I attend CSDA Legislative Days and Exhibitors Showcase annually.

**2. Have you ever been associated with any other state-wide associations (CSAC, ACWA, League, etc.):**

No

**3. List local government involvement (such as LAFCo, Association of Governments, etc.):**

Serve as the Pleasant Valley Recreation and Park District representative to the Ventura County Special Districts Association. Am one of the PVRPD Board members on the City of Camarillo/PVRPD Liaison Committee focusing on senior needs including facilities.

**4. List civic organization involvement:**

Member of the Camarillo Health Care District Early Morning Executive Panel – pre-COVID.



Fellow Coastal Network Members,

Having represented the Coastal Network as a CSDA Board member since 2016, I'm requesting your support for re-election.

I'm currently CSDA Board Vice President, having also served as Secretary and Treasurer. I've chaired the Fiscal and Membership committees, now serving as the ex-officio on all CSDA committees. I'm a representative to the Special Districts Leadership Foundation and their Scholarship Committee. I've completed the SDLF Leadership Academy, and regularly attend the annual Legislative Days, Annual Conference and Exhibitor Showcases.

As a Director for the Pleasant Valley Recreation and Park District Board since 2008, I've served as Board Chair, on the Personnel and Liaison Committees, and as PVRPD's representative to the Ventura County Special Districts Association and CSDA. I have been honored by VCSDA as Director of the Year.

My career in Public Service for 31 years was in law enforcement Human Resources. Following my retirement, I worked as a contract investigator for the Department of Justice.

My experience on the PVRPD Board and my work as a public servant has provided me with a solid foundation of experience, enabling me to represent your District's interests on the CSDA Board.

As a board member, I represent all special districts in the Coastal Network, supporting CSDA's on-going efforts to offer educational classes and informative conferences and their pro-active legislative advocacy and policy proposals that impact all Special Districts.

If re-elected, I will continue to work with board members and staff to further advocacy efforts at the state and national level, increase membership, and further enhance services provided to member agencies.

I would appreciate your district's support in my re-election as the Coastal Network representative on the CSDA Board of Directors. I respectfully ask for your vote.

Sincerely,

Elaine L. Magner, Director  
Pleasant Valley Recreation and Park District



## 2021 CSDA BOARD CANDIDATE INFORMATION SHEET

The following information **MUST** accompany your nomination form and Resolution/minute order:

Name: Hugh Rafferty

District/Company: Santa Maria Public Airport District

Title: Director

Elected/Appointed/Staff: Elected

Length of Service with District: 10 years

1. Do you have current involvement with CSDA (such as committees, events, workshops, conferences, Governance Academy, etc.):

CSDA Secondary Legislative Committee

2. Have you ever been associated with any other state-wide associations (CSAC, ACWA, League, etc.):

California Credit Union League - PAC and Advocacy Committee

3. List local government involvement (such as LAFCo, Association of Governments, etc.):

Santa Barbara County Chapter CSDA

4. List civic organization involvement:

Santa Barbara County Taspayers Association

Chamber of Commerce - Leadership Santa Maria

**\*\*Candidate Statement** – Although it is not required, each candidate is requested to submit a candidate statement of no more than 300 words in length. **Any statements received in the CSDA office after March 29, 2021 will not be included with the ballot.**

## CSDA Board of Directors 2021 – 2023 Election Candidate Statement

I am the Past-president of the Santa Maria Public Airport District, and currently serve as Board Secretary. I have served on the District board for 10 years.

I'm the Past-president of the Santa Barbara County Chapter of CSDA, and continue to serve on the Board of Directors. I've served on the board for approximately 7 years. In addition, I currently serve on the CSDA Secondary Legislative Committee, and have served on the HR Support Committee.

I'm a past member of the Santa Maria Valley Chamber of Commerce Board of Directors, and currently serve on its Leadership Santa Maria Valley Board.

I'm an Honorably Discharged Marine Corps Veteran, and was designated a Lifetime Honorary Commander Emeritus by the 30<sup>th</sup> Space Wing at Vandenberg Air Force Base.

I hold a BA degree in General Studies, an MA in Human Development and Management, and a Ph. D in Management.

In addition to the above, I serve/have served in the following capacities:

- . Board Member and Past President – Santa Barbara County Taxpayers Association
- . Current President – Committee to Improve North (Santa Barbara) County
- . Chairman – Volunteer Leadership Committee, California Credit Union League
- . Board Member – California Credit Union League Advocacy Committee and Political Action Committee

I'm the recipient of several California Assembly, California State Senate and Congressional Certificates of Recognition, as well as Chamber of Commerce Citizen of the Year, and California Credit Union League Volunteer of the Year Awards.

My work with these various organizations has brought me into contact with numerous City, County, State and Federal elected officials, as well as managers and directors and employees of a number of special districts, and I hope to bring these experiences to the CSDA Board of Directors

I hope you will consider me for election to the CSDA Coastal Network board position.

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Hugh Rafferty

# **AGENDA ITEM #2**

**AGENDA ITEM: 2**

**MEETING DATE: July 5, 2021**

**I. NATURE OF ITEM**

Update and Discussion of Outreach Plan for Transition to District-Based Elections

**II. BACKGROUND INFORMATION**

On August 20, 2018, the Board adopted Resolution No.18-637 declaring their intent to transition from at-large elections to district-based elections in accordance with the California Voting Rights Act for the November 2022 General Election, following the completion and receipt of the data from the 2020 Census.

Several other local governments are also transitioning to district-based elections in time for the November 2022 election cycle. In addition to the Goleta Sanitary District (GSD), both the City of Goleta (the City) and the Goleta Water District (GWD) are engaged in transition activities. GSD may wish to align some of our outreach activities with those of either the City, GWD, or both to maximize reach in the community.

There are a number of prescribed activities that are to take place before the map selection for the districts can be finalized. These include: conduct outreach to the public, including non-English-speaking communities to explain the districting process and to encourage public participation, hold two public hearings to gather input before map version(s) are drawn, conduct two additional public hearings after draft map(s) have been drawn for additional public feedback, publicize all hearing information in advance of public hearings (on website, social media, in press releases, posted in communities), and after draft map(s) are released, submit final version of map to the County's Office of Elections.

Staff has compiled an updated calendar of the planned outreach activities of GSD, the City and GWD for review. The City has already held its first two public hearings. GWD has tentatively planned for hearings in September and October 2021. GSD has hearings planned for October, 2021. The City plans to complete the map approval process by February 15, 2022, GWD plans to complete their process by March 8, 2022. GSD plans to complete the process by April, 2022. The Board may decide to keep the timeline the same, or change the dates of some of the activities, based on the activities and timelines of the other governments.

**III. COMMENTS AND RECOMMENDATIONS**

Goleta Sanitary District is scheduled to have the first two informational public hearings in October, 2021 after the draft maps by the City of Goleta are released, and after GWD has its first public hearing. The Board may wish to schedule initial public hearings to coincide with GWD's timeline, or keep the tentative schedule as is, pending discussion.

The GSD outreach plan with tentative timeline for the transition to district-based elections is presented herein for Board consideration, as is a calendar with outreach activities for all three government institutions.

#### **IV. REFERENCE MATERIALS**

Outreach Plan for Transition to District-Based Elections

Comparison Calendar of Local Governments' Outreach Plans



## Outreach Plan for Transition to District-Based Elections

Date	Activity Description
May 2021	Spring <b>newsletter</b> mailed out containing information regarding upcoming transition to district-based elections.
May 2021	District <b>website</b> is revised to include information on transition to district-based elections. This information is updated throughout the process as required.
Aug. 2021	<b>Flyer</b> is mailed to all residents of the District in both English and Spanish about the district elections process and proposed schedule of public meetings. Flyers posted in community (i.e., community center, library, etc.), website is updated, posted on FB.
Aug. 2021	<b>Press release</b> , social media posts, website updated regarding first round of public hearings.
Sept. 2021	<b>First round of public hearings (2)</b> is held to gather input of possible voting district boundaries.
Sept. 2021	<b>Census</b> data released. Website information is updated, posted on FB.
Dec. 2021	<b>Preliminary voting district maps prepared</b> by demographers based on census data, communities of interest, and public and Board comments.
Jan. 2022	<b>Press release</b> , social media posts, web updated regarding 2 <sup>nd</sup> round of public hearings on draft voting district maps
Jan. 2022	<b>Draft voting district map(s) published</b> (website, Facebook, posted in community).
Jan. 2022	<b>Flyer</b> is mailed to all residents of the District in both English and Spanish about the district elections process and proposed schedule of public meetings. Flyers posted in community (i.e., community center, library, etc.), website is updated, posted on FB.
Feb. 2022	<b>Second round of public hearings (2)</b> is held to gather input on proposed voting district maps.
March 2022	<b>Press release</b> , social media posts, web updated regarding public hearing on adoption of proposed voting district map.
March 2022	<b>Final Public hearing</b> held to adopt proposed voting district maps and institute district-based elections.
May 2022	<b>Adopted voting district map files are sent to County of Santa Barbara</b> for November election
Nov. 2022	<b>General Election</b> based on adopted voting districts for 2 GSD Board members candidates

## June 2021 Goleta area governments outreach schedules for transition to district elections

◀ May 2021		June 2021					Jul 2021 ▶
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
		1	2	3	4	5	
6	7 City of Goleta 1 <sup>st</sup> community workshop	8	9	10	11	12	
13	14	15	16	17	18	19	
20	21	22	23	24	25	26 City of Goleta 2 <sup>nd</sup> community workshop	
27	28	29	30				

More Calendars: [Jul 2021](#), [Aug 2021](#), [2021](#)

July 2021 Goleta area governments outreach schedules for transition to district-based elections

July 2021						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6 GWD Cmte. Mtg. to approve mailer insert 5:30 p.m.	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

# August 2021 Goleta area governments outreach schedules for transition to district elections

August 2021						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2 City of Goleta 3 <sup>rd</sup> workshop/1 <sup>st</sup> public hearing	3	4	5	6	7
8	9	10	11	12	13	14
15	16 Official population data released	17 City of Goleta 2 <sup>nd</sup> Public hearing	18	19	20	21
22	23 GSD tentative mailing of mailer, website updated, posted on FB with dates of hearings	24	25	26	27	28
29	30	31				

# September 2021 Goleta area governments outreach schedules for transition to district elections

◀ Aug 2021		<b>September 2021</b>					Oct 2021 ▶
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
			<b>1</b> City of Goleta Draft maps posted After census data released betw/Aug 16-Sept. 23	<b>2</b>	<b>3</b>	<b>4</b>	
<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>11</b>	
<b>12</b>	<b>13</b>	<b>14</b>	<b>15</b>	<b>16</b>	<b>17</b>	<b>18</b>	
<b>19</b>	<b>20</b> GSD press release, social media posts, website updated with 1 <sup>st</sup> round info	<b>21</b>	<b>22</b>	<b>23</b> Adjusted census data released from State	<b>24</b>	<b>25</b> Goleta Water 1 <sup>st</sup> Public hearing- tentative	
<b>26</b>	<b>27</b>	<b>28</b>	<b>29</b>	<b>30</b>			

# October 2021 Goleta area governments outreach schedules for transition to district elections

October 2021						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4 GSD 1 <sup>st</sup> public hearing-tentative Date TBD	5	6	7	8	9
10	11	12	13	14	15	16 GSD 2 <sup>nd</sup> public hearing-tentative Date TBD
17	18	19 Goleta Water 2 <sup>nd</sup> Public Hearing-tentative	20	21	22	23
24	25	26	27	28	29	30
31						

# November 2021 Goleta area governments outreach schedules for transition to district elections

◀ Oct 2021		<b>November 2021</b>					Dec 2021 ▶
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
	<b>1</b> City of Goleta-City Council and Pub. Engagement Cms. To review maps-date TBD	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	
<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>11</b>	<b>12</b>	<b>13</b>	
<b>14</b>	<b>15</b> GSD preliminary maps to be prepared Nov. 2021-Jan. 2022 Exact dates TBD	<b>16</b>	<b>17</b>	<b>18</b>	<b>19</b>	<b>20</b>	
<b>21</b>	<b>22</b>	<b>23</b>	<b>24</b>	<b>25</b>	<b>26</b>	<b>27</b>	
<b>28</b>	<b>29</b>	<b>30</b>					

## December 2021 Goleta area governments outreach schedules for transition to district elections

◀ Nov 2021							December 2021							Jan 2022 ▶						
Sun		Mon		Tue		Wed		Thu		Fri		Sat								
						<b>1</b> GSD preliminary maps to be prepared Nov. 2021-Jan. 2022 Exact dates TBD			<b>2</b>		<b>3</b>		<b>4</b>							
<b>5</b>		<b>6</b>		<b>7</b>		<b>8</b>		<b>9</b> Goleta Water post-map 1 <sup>st</sup> public hearing		<b>10</b>		<b>11</b>								
<b>12</b>		<b>13</b>		<b>14</b>		<b>15</b>		<b>16</b>		<b>17</b>		<b>18</b>								
<b>19</b>		<b>20</b>		<b>21</b>		<b>22</b>		<b>23</b>		<b>24</b>		<b>25</b>								
<b>26</b>		<b>27</b>		<b>28</b>		<b>29</b>		<b>30</b>		<b>31</b>										

# January 2022 Goleta area governments outreach schedules for transition to district elections

January 2022						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3 GSD Preliminary voting maps prepared-Date TBD	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18 Goleta Water post-map 2 <sup>nd</sup> hearing	19	20	21	22
23	24	25	26	27	28	29
30	31					

## February 2022 Goleta area governments outreach schedules for transition to district elections

◀ Jan 2022		February 2022					Mar 2022 ▶
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
		<b>1</b> City of Goleta 3 <sup>rd</sup> hearing of draft map(s)	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	
<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>11</b>	<b>12</b>	
<b>13</b>	<b>14</b>	<b>15</b> City of Goleta 4 <sup>th</sup> Public hearing on maps and Council review and direction	<b>16</b>	<b>17</b>	<b>18</b>	<b>19</b>	
<b>20</b>	<b>21</b> GSD press release, social media posts, second flyer with dates of map hearings-Date TBD	<b>22</b>	<b>23</b>	<b>24</b>	<b>25</b>	<b>26</b>	
<b>27</b>	<b>28</b> GSD Draft map(s) published on website, FB, posted in community-Date TBD						

## March 2022 Goleta area governments outreach schedules for transition to district elections

◀ Feb 2022		March 2022					Apr 2022 ▶
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
		<b>1</b> City of Goleta-final adoption by City Council of new map for by-district elections	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	
<b>6</b>	<b>7</b> GSD 1 <sup>st</sup> Public hearing on map(s)-date TBD	<b>8</b> Goleta Water- Board adoption of approved map	<b>9</b>	<b>10</b>	<b>11</b>	<b>12</b>	
<b>13</b>	<b>14</b>	<b>15</b>	<b>16</b>	<b>17</b>	<b>18</b>	<b>19</b> GSD 2 <sup>nd</sup> Public hearing on mpa(s)- date TBD	
<b>20</b>	<b>21</b>	<b>22</b>	<b>23</b>	<b>24</b>	<b>25</b>	<b>26</b>	
<b>27</b>	<b>28</b> Press release, social media posts, web updates- Date TBD could be early April	<b>29</b>	<b>30</b>	<b>31</b>			

## April 2022 Goleta area governments outreach schedules for transition to district elections

April 2022						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4 GSD Final public hearing/adoption of proposed map and institution of district-based election-date TBD	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

# May 2022 Goleta area governments outreach schedules for transition to district elections

◀ Apr 2022		<b>May 2022</b>					Jun 2022 ▶
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
1	2	3	4	5	6	7	
8	9 GSD Adopted map files sent to County for Nov. election- date TBD	10	11	12	13	14	
15	16	17	18	19	20	21	
22	23	24	25	26	27	28	
29	30	31					

# **AGENDA ITEM #3**

**AGENDA ITEM: 3**

**MEETING DATE: July 5, 2021**

**I. NATURE OF ITEM**

Review and Consideration of 2021 Action Plan

**II. BACKGROUND INFORMATION**

The District's Governing Board held its annual planning meeting on Wednesday, March 24, 2021 at the Pacifica Suites. At this meeting, the Board reviewed the District's 2020 Annual Report along with the prior year and year to date financial information. A preliminary draft action plan for 2021 was developed based on this information that included 26 separate goals and 81 actions related to the District's Strategic Plan.

On April 5, 2021 the summary of the draft 2021 Action Plan was reviewed by the Board to confirm that all prior comments had been incorporated. Staff was then directed to return with a final action plan with proposed timeline for all action items, and to provide quarterly status reports on progress. As such, a status report on the 2021 Action Plan is presented herein for Board consideration.

**III. COMMENTS AND RECOMMENDATIONS**

Out of the 81 actions included in the 2021 Action Plan, 19 have been completed or are in progress. The remaining actions are scheduled for completion by the end of the fiscal year.

This report is for informational purposes only. As such no Board action is required.

**IV. REFERENCE MATERIALS**

2021 Action Plan Status Report dated July 5, 2021

**GOLETA SANITARY DISTRICT  
2021 ACTION PLAN STATUS REPORT  
July 5, 2021**

		Original Timeline	Current Status	Estimated Completion	Remarks
<b>Goal #1 Implement Long-Range CIP Master Plan Projects</b>					
1	Update CS CIP based on updated CCTV inspections	Q3 2021	In Progress	Q3 2021	
2	Complete PS&E of Lift Station Rehabilitation Project	Q2 2021	Complete		100% design drawings completed
3	Board approval of CEQA and PS&E	Q2 2021	In Progress	Q3 2021	Board approval of CEQ and PS&E scheduled for July
4	Put project out to bid	Q3 2020			
5	Initiate construction of Lift Station Rehabilitation Project	Q4 2020			
<b>Goal #2 Implement BESP Phase 1 Improvements</b>					
6	Complete final design and environmental review of BESP Phase 1 Improvements	Q3 2020			
7	Board approval of CEQA and PS&E	Q4 2020			
8	Determine construction timeline	Q2 2021			
9	Obtain regulatory permits				
10	Put project out to bid				
11	Integrate BESP improvements into LRMP				

**GOLETA SANITARY DISTRICT  
2021 ACTION PLAN STATUS REPORT  
July 5, 2021**

		Original Timeline	Current Status	Estimated Completion	Remarks
<b>Goal #3 Implement Lystemize Refeed Pilot Project</b>					
12	Implement refeed test procedures and collect relevant data	Q2 2021	In Progress		Feed rate up to 50%. Next phase is TWAS testing
13	Board consideration of proforma and potential for long term use	Q4 2021			
14	Update LRMP as needed	Q4 2021			
<b>Goal #4 Complete Planned Office Space Improvements</b>					
15	Complete office space improvements in staff kitchen area	Q3 2021	In Progress		Offices in use counters and cabinets in kitchen area ordered
<b>Goal #5 Investigate Reclamation Facility Filter Improvements</b>					
16	Implement recommended filter improvements	Q4 2021	In Progress		New chemicals being tested and new dosing pumps being installed
<b>Goal #6 Initiate Review/Conceptual Engineering of Onsite Water Reuse Facility</b>					
17	Prepare and issue RFQ for conceptual engineering analysis	Q3 2021			
18	Board consideration of recommended consultant team	Q3 2021			
19	Completion of conceptual engineering study	Q1 2022			
20	Board consideration of study findings	Q1 2022			

**GOLETA SANITARY DISTRICT  
2021 ACTION PLAN STATUS REPORT  
July 5, 2021**

		Original Timeline	Current Status	Estimated Completion	Remarks
<b>Goal #7 Update CIP Storyboard and post on District website</b>					
21	Create new CIP sheets for BESP projects and other new LRMP projects	Q3 2021			
22	Update CIP story map and link to District Website	Q4 2021			
<b>Goal #8 Adopt and Implement Capacity Exceedance Policy</b>					
23	Complete outreach to affected users and schedule public hearing on proposed policy	Q4 2021			
24	Board consideration of Capacity Exceedance Policy	Q4 2021			
25	Implement policy as directed by Board	Q1 2022			
<b>Goal #9 Conduct rate study based on results from CASA's Flow &amp; Loadings Study</b>					
26	Continue participation in CASA F&L study	Ongoing	In Progress		
27	Prepare RFQ/P for selection of rate study consultant	Q4 2021			
28	Board consideration of rate study consultant	Q4 2021			
29	Conduct rate study based on results of CASA F&L study	Q1 2022			
30	Board consideration of rate study	Q2 2021			
31	Board adoption new rate structure	Q2 2022			

**GOLETA SANITARY DISTRICT  
2021 ACTION PLAN STATUS REPORT  
July 5, 2021**

		Original Timeline	Current Status	Estimated Completion	Remarks
<b>Goal #10 consider alternative project delivery and finance options for future capital projects</b>					
<b>32</b>	Research alternative project delivery and finance options for future capital projects	Q4 2021			
<b>33</b>	Board consideration of alternative project delivery and finance options for future capital projects	Q1 2022			
<b>Goal #11 Retain Platinum Level District of Distinction Recognition from CSDA</b>					
<b>34</b>	Complete DOD training and tasks as required	Q3 2021			
<b>35</b>	Complete and submit DOD application to CSDA prior to deadline for consideration	Q3 2021			
<b>Goal #12 Improve collaboration with partner agencies</b>					
<b>36</b>	Schedule meetings with UCSB on existing and future energy sustainability efforts	Q4 2021			
<b>37</b>	Schedule meetings with GWD and COG on expanded rec water/reuse	Q4 2021			
<b>38</b>	Schedule meetings with SBMA on pretreatment proposal	Q2 2021	In Progress		Several meetings with SBMA staff held.
<b>39</b>	Meet with remaining contract entities to consider approval of Multi-Jurisdictional Agreements (MJA)	Q4 2021	In Progress		Meetings with SB, UCSB and County ongoing

**GOLETA SANITARY DISTRICT  
2021 ACTION PLAN STATUS REPORT  
July 5, 2021**

		Original Timeline	Current Status	Estimated Completion	Remarks
<b>Goal #13 Implement District Based Elections Pursuant to the CVRA</b>					
40	Obtain 2020 Census demographic data	Q3 2021			
41	Conduct public hearings to gather public input on voting district areas	Q4 2021			
42	Prepare draft voting district maps	Q4 2021			
43	Conduct public hearings on proposed voting district areas	Q1 2022			
44	Adopt voting district areas and send information to County in time for 2022 election	Q4 2021			
<b>Goal #14 Implement Effective Utility Management Practices</b>					
49	Prioritize and initiate implementation of identified EUM practices	Q1 2022			
<b>Goal #15 Conduct tri-annual Board self-assessment</b>					
50	Conduct Board self-assessment	Q4 2021			
51	Board consideration of self-assessment results & recommendations	Q4 2021			

**GOLETA SANITARY DISTRICT  
2021 ACTION PLAN STATUS REPORT  
July 5, 2021**

		Original Timeline	Current Status	Estimated Completion	Remarks
<b>Goal #16 Maintain certification as Santa Barbara County Green Business</b>					
<b>52</b>	Review green business certification criteria to ensure compliance	Q4 2021			
<b>53</b>	Submit application if required to renew/maintain certification	Q1 2022			
<b>54</b>	Continue to support and participate in SBC Green Business program	Ongoing			
<b>Goal #17 Initiate Development of District Wide Resiliency Plan</b>					
<b>59</b>	Prepare draft RP	Q1 2022			
<b>60</b>	Board consideration of draft RP	Q1 2022			
<b>Goal #18 Develop Climate Adaptation and Business Continuity Plans</b>					
<b>61</b>	Select consultant to assist with preparation of Climate Adaptation Plan	Q2 2021	Complete		
<b>62</b>	Prepare Draft Climate Adaptation Plan	Q4 2021	In Progress		
<b>63</b>	Prepare Draft Business Continuity Plan	Q3 2021	In Progress		
<b>64</b>	Board Consideration of Draft Climate Adaptation and Business Continuity Plans	Q4 2021			

**GOLETA SANITARY DISTRICT  
2021 ACTION PLAN STATUS REPORT  
July 5, 2021**

		Original Timeline	Current Status	Estimated Completion	Remarks
<b>Goal #19 Implement annual outreach program activities</b>					
65	Review annual outreach program with Board Outreach Committee	Q2 2021	Complete		
66	Board consideration of annual outreach program	Q2 2021	Complete		
<b>Goal #20 Develop outreach program for transition to District Elections</b>					
67	Review of outreach plan by Board Outreach Committee	Q2 2021	Complete		
68	Board Consideration of outreach plan for transition to district elections	Q2 2021	Complete		
69	Board consideration of establishment of Citizen Advisory Board or water academy	Q4 2021			
<b>Goal #21 Implement Competency Based Training Programs</b>					
70	Complete and implement CBT programs for CS and Operations staff	Q3 2020			
71	Develop virtual WRRF video tour and put on website	Q4 2020			
<b>Goal #22 Implement Competency Based Training Programs</b>					
72	Complete and implement CBT programs for CS and Operations staff	Q1 2021			
73	Initiate development of CBT program for Maintenance and Laboratory staff	Q2 2021			

**GOLETA SANITARY DISTRICT  
2021 ACTION PLAN STATUS REPORT  
July 5, 2021**

		Original Timeline	Current Status	Estimated Completion	Remarks
<b>Goal #23 Recruit and hire Project Manager</b>					
74	Develop position description and survey comparable positions	Q2 2021	Complete		
75	Board consideration of new position	Q2 2021	Complete		
76	Recruit and hire Project Manager	Q3 2021			
<b>Goal #24 Conduct 5 yr. salary and benefits survey of comparable organizations</b>					
77	Board consideration of hiring consultant to assist with salary survey	Q2 2021	Complete		
78	Conduct salary survey of comparable organizations	Q3 2021			
79	Board consideration of survey results	Q4 2021			
<b>Goal #25 Develop succession plans for near term retirements and key staff positions</b>					
80	Develop succession plans for near term retirements and key staff positions	Q2 2022			
<b>Goal #26 Engage new legal services firm for personnel related matters</b>					
81	Board consideration and selection of legal services firm	Q3 2021			

# **GENERAL MANAGER'S REPORT**

## **GOLETA SANITARY DISTRICT GENERAL MANAGER'S REPORT**

The following summary report describes the District's activities from June 22, 2021 through July 5, 2021. It provides updated information on significant activities under three major categories: Collection System, Treatment/Reclamation and Disposal Facilities, and General and Administration Items.

### **1. COLLECTION SYSTEM REPORT**

#### **LINES CLEANING**

Staff is conducting routine lines cleaning in the area of La Cumbre and Foothill Roads.

#### **CCTV INSPECTION**

Staff continues conducting routine Closed-Circuit Television (CCTV) inspections in the area of Cathedral Oaks Road and N. Kellogg Avenue.

Staff accepted delivery of a new Pan and Tilt Push Camera, equipped with a 300 ft. push rod (vs. the previous camera's 200 ft.). The camera can zoom in addition to the ability to tilt and pan. It also utilizes the WinCan CCTVI program allowing inspections to be readily incorporated into the Lucity Software and District Asset Management Program.

#### **GREASE AND OIL INSPECTIONS**

Staff continues with the annual Grease and Oil inspections.

#### **COMPETENCY-BASED TRAINING (CBT)**

Staff is working with DKF Solutions on preparations for a three-day Traffic Control and Excavation Safety training to be conducted July 16-18, 2021.

#### **REPAIR AND MAINTENANCE**

Staff replaced six manhole frames and covers near the area of Hollister Avenue and S. San Marcos Road as part of a recent County of Santa Barbara paving project.

#### **2021 CCTVI PROJECT REVIEW**

Staff has reviewed the initial CCTVI data results and has provided comments and corrections to District consultant Hazen & Sawyer. Hazen & Sawyer staff will continue their update of the District Asset Management Program. This update is scheduled for completion by end of July, 2021.

#### **FY 2020-21 HANDBILLED SEWER SERVICE CHARGES**

Staff continues working on the annual hand billing sewer service charge invoices.

### **2. TREATMENT, RECLAMATION AND DISPOSAL FACILITIES REPORT**

Plant flows have reduced to an average of 4.1 million gallons per day (MGD). Reclamation demand has increased to 1.5 MGD with the heat wave throughout the County. Flow concentrations and loadings during the weekends continue to cause intermittent challenges and various levels of plant interference.

Centrifuge operations are continuing as planned. Dredging operations have been completed across lagoon #3. The dredge has been serviced by Maintenance staff and relocated to lagoon #2 where the dewatering operation will continue through FY 2021-22.

The Lystek refeed project is in its last phase of biosolids recycling. We have attained 50% solids refeed. We will continue to collect data until we have a full 30 days of operation at this rate.

Plant Maintenance staff continue to work on the replacement of the telemetry communication equipment. The equipment being replaced was near the end of its useful life. The new equipment should service the plant for the next 10-15 years.

### **3. GENERAL AND ADMINISTRATIVE ITEMS**

#### **Financial Report**

The District account balances as of July 5, 2021 shown below are approximations to the nearest dollar and indicate the overall funds available to the District at this time.

Operating Checking Accounts:	\$ 525,741
Investment Accounts:	\$ 30,683,999
Total District Funds:	\$ 31,209,739

The following transactions are reported herein for the period 06/22/21 – 07/05/21.

Regular, Overtime, Cash-outs and Net Payroll:	\$ 137,065
Claims:	\$ 347,904
Total Expenditures:	\$ 484,969
Total Deposits:	\$ 653,464

Transfers of funds:

LAIF to Community West Bank Operational (CWB):	\$ - 0 -
CWB Operational to CWB Money Market:	\$ - 0 -
CWB Money Market to CWB Operational:	\$ - 0 -

The District's investments comply with the District's Investment Policy adopted per Resolution No. 16-606. The District has adequate funds to meet the next six months of normal operating expenses.

#### **Local Agency Investment Fund (LAIF)**

LAIF Monthly Statement – June, 2021  
LAIF Quarterly Report – Previously submitted.  
PMIA/LAIF Performance – Previously submitted.  
PMIA Effective Yield – Previously submitted.

**Community West Bank (CWB)**

CWB Money Market Account – June, 2021

**Deferred Compensation Accounts**

CalPERS 457 Deferred Compensation Plan – Previously submitted.  
Lincoln 457 Deferred Compensation Plan – June, 2021

**COVID-19 Response Plan Update**

A verbal update will be provided at the meeting.

**Personnel Update**

A verbal update will be provided at the meeting.

California State Treasurer  
**Fiona Ma, CPA**



Local Agency Investment Fund  
P.O. Box 942809  
Sacramento, CA 94209-0001  
(916) 653-3001

July 01, 2021

[LAIF Home](#)  
[PMIA Average Monthly Yields](#)

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GOLETA SANITARY DISTRICT

GENERAL MANAGER  
ONE WILLIAM MOFFETT PLACE  
GOLETA, CA 93117

[Tran Type Definitions](#)

**Account Number:** 70-42-002

June 2021 Statement

**Account Summary**

Total Deposit:	0.00	Beginning Balance:	2,022,218.60
Total Withdrawal:	0.00	Ending Balance:	2,022,218.60



445 Pine Avenue  
Goleta, CA 93117

## Statement Ending 06/30/2021

GOLETA SANITARY DISTRICT

Customer Number: XXXXXXXX5554

RETURN SERVICE REQUESTED

GOLETA SANITARY DISTRICT  
MONEY MARKET  
1 WILLIAM MOFFETT PL  
GOLETA CA 93117-3901

All Community West Bank branch offices are open to serve you Monday through Friday,  
9:00 am to 5:00 pm.

### Business Financing

When your business needs new funding or commercial real estate financing, please contact your Community West Banker. We offer flexible financing at competitive rates.

### Loan Payment Mailing Address Change

The mailing address for loan payments has changed. If you are not mailing a payment with a coupon, make sure you write the loan number on the check. Please mail loan payments to:

CWB Loan Servicing, P.O. Box 80233, City of Industry, CA 91716-8233

### Summary of Accounts

Account Type	Account Number	Ending Balance
PUBLIC AGENCY-MMDA	XXXXXXXX5554	\$28,661,780.27

### PUBLIC AGENCY-MMDA - XXXXXXXX5554

#### Account Summary

Date	Description	Amount		
05/29/2021	Beginning Balance	\$28,651,418.66	Average Ledger Balance	\$28,651,418.66
	1 Credit(s) This Period	\$10,361.61		
	0 Debit(s) This Period	\$0.00		
06/30/2021	Ending Balance	\$28,661,780.27		

#### Account Activity

Post Date	Description	Debits	Credits	Balance
05/29/2021	Beginning Balance			\$28,651,418.66
06/30/2021	INTEREST AT .4000 %		\$10,361.61	\$28,661,780.27
06/30/2021	Ending Balance			\$28,661,780.27



# Performance Update

MultiFund

Quoted performance data represents past performance. Past performance does not guarantee nor predict future performance. Current performance may be lower or higher than the performance data quoted. Please keep in mind that double-digit returns are highly unusual and cannot be sustained.

Variable products are sold by prospectus. Consider the investment objectives, risks, charges, and expenses of the variable product and its underlying investment options carefully before investing. The prospectus contains this and other information about the variable product and its underlying investment options. Please review the prospectus available online for additional information. Read it carefully before investing.

Investment return and principal value of an investment will fluctuate so that an investor's unit values, when redeemed, may be worth more or less than their original cost.

## Monthly hypothetical performance adjusted for contract fees \*

Investment Options	Inception Date	Change from Previous Day	YTD as of 06/30/2021	YTD as of 06/30/2021	Average Annual Total Return (%) as of 6/30/2021						Since Incep.	
					1 Mo	3 Mo	1 Yr	3 Yr	5 Yr	10 Yr		
<b>Risk Managed</b>												
Fidelity® VIP Freedom 2055 Portfolio <sup>SM</sup> - Service Class <sup>6,9</sup>	RM	04/11/2019	-0.28	11.82	11.82	0.55	6.91	38.00	N/A	N/A	N/A	18.68
Fidelity® VIP Freedom 2060 Portfolio <sup>SM</sup> - Service Class <sup>6,9</sup>	RM	04/11/2019	-0.28	11.78	11.78	0.55	6.90	38.04	N/A	N/A	N/A	18.73
<b>Maximum Capital Appreciation</b>												
AB VPS Global Thematic Growth Portfolio - Class B <sup>1,2</sup>	MCA	01/11/1996	-0.76	9.81	9.81	2.01	6.82	42.62	20.24	18.99	9.78	6.31
DWS Alternative Asset Allocation VIP Portfolio - Class A <sup>1,2,3,6,7</sup>	MCA	02/02/2009	0.00	8.63	8.63	1.15	5.88	23.19	6.68	4.00	2.28	4.77
LVIP Baron Growth Opportunities Fund - Service Class <sup>4</sup>	MCA	10/01/1998	-0.38	8.53	8.53	2.50	7.11	46.73	19.04	19.03	13.65	11.84
LVIP Delaware SMID Cap Core Fund - Standard Class <sup>4,5</sup>	MCA	07/12/1991	-0.11	15.83	15.83	-0.48	3.67	49.13	11.08	12.12	10.55	9.51
LVIP SSGA Emerging Markets 100 Fund - Standard Class <sup>1,19</sup>	MCA	06/18/2008	-0.15	12.55	12.55	-2.19	4.12	42.63	4.90	7.01	0.02	3.03
LVIP SSGA Small-Cap Index Fund - Standard Class <sup>4,18</sup>	MCA	04/18/1986	0.07	16.87	16.87	1.81	4.01	59.96	11.92	14.82	10.76	7.54
LVIP T. Rowe Price Structured Mid-Cap Growth Fund - Standard Class <sup>4</sup>	MCA	02/03/1994	-0.63	8.90	8.90	6.29	9.38	39.52	20.78	19.22	13.91	7.71
<b>Long Term Growth</b>												
American Funds Global Growth Fund - Class 2 <sup>1</sup>	LTG	04/30/1997	-0.51	11.05	11.05	2.35	7.47	38.48	19.05	18.47	12.40	9.90
American Funds Growth Fund - Class 2	LTG	02/08/1984	-0.25	12.32	12.32	3.77	8.80	51.81	25.54	24.27	16.41	12.58

# Performance Update

## Monthly hypothetical performance adjusted for contract fees \*

Investment Options		Inception Date	Change from Previous Day	YTD as of 06/30/2021	YTD as of 06/30/2021	Average Annual Total Return (%) as of 6/30/2021						Since Incep.
						1 Mo	3 Mo	1 Yr	3 Yr	5 Yr	10 Yr	
American Funds International Fund - Class 2 <sup>1</sup>	LTG	05/01/1990	-0.53	4.09	4.09	-0.44	5.69	33.13	7.34	10.88	5.63	7.06
Delaware VIP Small Cap Value <sup>4, 5</sup>	LTG	12/27/1993	0.43	23.42	23.42	-3.19	3.12	62.43	7.15	10.71	9.08	9.44
Fidelity® VIP Contrafund® Portfolio - Service Class	LTG	01/03/1995	-0.18	13.24	13.24	4.15	11.09	34.52	19.73	17.77	13.17	11.00
Fidelity® VIP Growth Portfolio - Service Class	LTG	10/09/1986	-0.28	12.97	12.97	4.17	9.95	41.85	24.47	23.85	16.48	10.44
LVIP BlackRock Global Real Estate Fund - Standard Class <sup>1, 2, 9</sup>	LTG	04/30/2007	-0.65	17.25	17.25	1.23	9.89	35.37	9.21	5.66	5.38	1.85
LVIP Delaware Mid Cap Value Fund - Standard Class <sup>4, 5</sup>	LTG	12/28/1981	0.40	19.19	19.19	-1.48	4.07	54.41	8.84	11.23	9.75	10.48
LVIP Delaware Social Awareness Fund - Standard Class <sup>5</sup>	LTG	05/02/1988	-0.04	13.88	13.88	1.88	6.69	39.89	17.57	16.14	12.76	10.25
LVIP Dimensional U.S. Core Equity 1 Fund - Standard Class	LTG	12/28/1981	0.19	16.51	16.51	1.07	6.58	46.13	15.80	15.89	12.79	10.03
LVIP Mondrian International Value Fund - Standard Class <sup>1</sup>	LTG	05/01/1991	-0.73	11.49	11.49	-1.44	4.91	31.60	3.92	5.74	3.50	5.44
LVIP SSGA International Index Fund - Standard Class <sup>1, 18, 20</sup>	LTG	04/30/2008	-0.93	8.24	8.24	-1.68	5.15	30.39	6.97	8.83	4.49	2.04
LVIP SSGA S&P 500 Index Fund - Standard Class <sup>18, 21</sup>	LTG	05/01/2000	0.13	14.56	14.56	2.21	8.21	39.12	17.19	16.20	13.41	5.96
LVIP Vanguard Domestic Equity ETF Fund - Service Class <sup>6, 22</sup>	LTG	04/29/2011	0.06	14.17	14.17	2.17	7.72	40.90	16.91	15.70	12.49	11.88
LVIP Vanguard International Equity ETF Fund - Service Class <sup>1, 6, 22</sup>	LTG	04/29/2011	-0.70	8.90	8.90	-0.62	4.85	34.67	8.02	9.68	4.54	4.09
MFS® VIT Utilities Series - Initial Class <sup>2</sup>	LTG	01/03/1995	-0.49	2.52	2.52	-1.44	1.42	19.62	9.32	7.82	7.34	10.05
<b>Growth and Income</b>												
American Funds Growth-Income Fund - Class 2	GI	02/08/1984	-0.10	13.57	13.57	1.15	7.11	33.27	13.54	15.11	12.61	10.34
BlackRock Global Allocation V.I. Fund - Class I <sup>1, 3</sup>	GI	02/28/1992	-0.29	6.09	6.09	-0.14	4.58	27.14	11.60	9.68	6.12	6.64
Fidelity® VIP Freedom 2020 Portfolio <sup>SM</sup> - Service Class <sup>6, 8</sup>	GI	04/26/2005	-0.13	5.97	5.97	0.63	4.54	21.12	10.38	9.73	7.17	6.26
Fidelity® VIP Freedom 2025 Portfolio <sup>SM</sup> - Service Class <sup>6, 8</sup>	GI	04/26/2005	-0.17	6.85	6.85	0.65	4.93	23.84	11.21	10.58	7.95	6.83

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# Performance Update

## Monthly hypothetical performance adjusted for contract fees \*

Investment Options		Inception Date	Change from Previous Day	YTD as of 06/30/2021	YTD as of 06/30/2021	Average Annual Total Return (%) as of 6/30/2021						Since Incep.
						1 Mo	3 Mo	1 Yr	3 Yr	5 Yr	10 Yr	
Fidelity® VIP Freedom 2030 Portfolio <sup>SM</sup> - Service Class <sup>6, 8</sup>	GI	04/26/2005	-0.17	7.95	7.95	0.65	5.41	27.29	12.12	11.98	8.67	7.14
Fidelity® VIP Freedom 2035 Portfolio <sup>SM</sup> - Service Class <sup>6, 8</sup>	GI	04/08/2009	-0.24	10.22	10.22	0.59	6.28	33.72	13.56	13.50	9.56	12.42
Fidelity® VIP Freedom 2040 Portfolio <sup>SM</sup> - Service Class <sup>6, 8</sup>	GI	04/08/2009	-0.25	11.82	11.82	0.58	6.88	37.98	14.50	14.09	9.90	12.79
Fidelity® VIP Freedom 2045 Portfolio <sup>SM</sup> - Service Class <sup>6, 8</sup>	GI	04/08/2009	-0.28	11.80	11.80	0.54	6.86	37.96	14.50	14.09	9.95	12.87
Fidelity® VIP Freedom 2050 Portfolio <sup>SM</sup> - Service Class <sup>6, 8</sup>	GI	04/08/2009	-0.27	11.81	11.81	0.58	6.87	37.94	14.47	14.08	9.94	12.98
LVIP BlackRock Advantage Allocation Fund - Standard Class <sup>3, 5, 10</sup>	GI	07/28/1988	-0.05	4.77	4.77	0.78	4.27	17.05	8.86	7.89	5.93	5.91
LVIP Delaware REIT Fund - Standard Class <sup>2, 5, 9</sup>	GI	05/04/1998	-0.56	20.50	20.50	2.56	11.74	33.35	7.49	3.39	7.10	7.73
LVIP Delaware Value Fund - Standard Class <sup>5</sup>	GI	07/28/1988	0.37	11.83	11.83	-2.25	2.85	31.58	8.14	8.15	10.49	7.98
LVIP Delaware Wealth Builder Fund - Standard Class <sup>3, 5, 10</sup>	GI	08/03/1987	0.14	6.54	6.54	0.33	3.82	17.81	7.17	6.62	5.59	6.09
LVIP JPMorgan Retirement Income Fund - Standard Class <sup>3, 5, 10</sup>	GI	04/27/1983	-0.07	3.20	3.20	0.46	3.11	13.85	6.66	5.73	4.74	6.64
<b>Income</b>												
LVIP BlackRock Inflation Protected Bond Fund - Standard Class <sup>12</sup>	I	04/30/2010	0.09	1.28	1.28	-0.04	1.32	4.07	3.14	2.13	1.31	1.72
LVIP Delaware Bond Fund - Standard Class <sup>5, 12</sup>	I	12/28/1981	0.05	-1.91	-1.91	0.51	1.39	0.65	4.93	2.67	2.77	6.58
LVIP Delaware Diversified Floating Rate Fund <sup>5, 14</sup>	I	04/30/2010	-0.02	-0.32	-0.32	-0.09	-0.15	0.69	0.71	0.84	0.20	0.29
LVIP Delaware Diversified Income Fund - Standard Class <sup>5, 12</sup>	I	05/16/2003	0.05	-1.57	-1.57	0.64	1.67	2.83	5.62	3.21	2.89	4.40
LVIP Delaware High Yield Fund - Standard Class <sup>5, 12, 15</sup>	I	07/28/1988	0.10	2.80	2.80	1.16	2.25	13.65	6.72	6.08	4.72	5.70
LVIP Global Income Fund - Standard Class <sup>1, 10, 12, 13</sup>	I	05/04/2009	-0.03	-3.32	-3.32	-0.47	0.45	-0.33	2.96	1.91	0.84	2.50
LVIP SSGA Bond Index Fund - Standard Class <sup>12, 18</sup>	I	04/30/2008	0.09	-2.23	-2.23	0.70	1.51	-1.63	4.03	1.69	2.03	2.53
PIMCO VIT Total Return Portfolio - Administrative Class <sup>12</sup>	I	12/31/1997	0.09	-1.69	-1.69	0.70	1.74	0.13	4.53	2.62	2.48	4.25

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# Performance Update

## Monthly hypothetical performance adjusted for contract fees \*

Investment Options	Inception Date	Change from Previous Day	Average Annual Total Return (%) as of 6/30/2021									
			YTD as of 06/30/2021	YTD as of 06/30/2021	1 Mo	3 Mo	1 Yr	3 Yr	5 Yr	10 Yr	Since Incep.	
<b>Risk Managed - Asset Allocation</b>												
LVIP Global Conservative Allocation Managed Risk Fund - Standard Class <sup>1,3,6,10,16</sup>	RMAA	05/03/2005	-0.04	4.73	4.73	0.88	3.79	14.71	6.44	5.89	4.86	5.06
LVIP Global Growth Allocation Managed Risk Fund - Standard Class <sup>1,3,6,10,16</sup>	RMAA	05/03/2005	-0.14	8.54	8.54	0.83	5.16	21.29	6.90	7.46	4.86	4.84
LVIP Global Moderate Allocation Managed Risk Fund - Standard Class <sup>1,3,6,10,16</sup>	RMAA	05/03/2005	-0.09	7.07	7.07	0.91	4.76	18.19	6.60	6.91	4.75	5.00
LVIP SSGA Global Tactical Allocation Managed Volatility Fund - Standard Class <sup>1,3,6,10,11,13</sup>	RMAA	05/03/2005	-0.06	9.11	9.11	0.11	4.27	26.15	7.13	7.14	4.50	4.08
<b>Preservation of Capital</b>												
LVIP Government Money Market Fund - Standard Class <sup>10,17</sup>	PC	01/07/1982	0.00	-0.49	-0.49	-0.09	-0.25	-0.98	-0.04	-0.23	-0.60	2.72
<b>Risk Managed - US Large Cap</b>												
LVIP BlackRock Dividend Value Managed Volatility Fund - Standard Class <sup>10,11</sup>	RMUSL	02/03/1994	0.29	17.28	17.28	-2.37	3.90	39.93	8.85	9.18	6.65	6.81
LVIP Blended Large Cap Growth Managed Volatility Fund - Standard Class <sup>10,11,13</sup>	RMUSL	02/03/1994	-0.29	15.42	15.42	5.13	11.67	39.01	16.41	15.46	10.12	7.39
<b>Asset Allocation</b>												
LVIP T. Rowe Price 2010 Fund (Standard Class) <sup>6,8,10</sup>	AsA	05/01/2007	-0.02	5.42	5.42	0.68	3.92	17.79	8.75	6.98	4.89	4.30
LVIP T. Rowe Price 2020 Fund (Standard Class) <sup>6,8,10</sup>	AsA	05/01/2007	-0.05	6.64	6.64	0.73	4.38	21.84	9.84	8.33	5.44	4.43
LVIP T. Rowe Price 2030 Fund (Standard Class) <sup>6,8,10</sup>	AsA	05/01/2007	-0.11	9.00	9.00	0.86	5.32	28.80	11.57	9.55	5.99	4.71
LVIP T. Rowe Price 2040 Fund (Standard Class) <sup>6,8,10</sup>	AsA	05/01/2007	-0.16	11.30	11.30	0.89	6.05	34.86	12.99	10.75	6.42	4.68
LVIP T. Rowe Price 2050 Fund (Standard Class) <sup>6,8,10</sup>	AsA	04/29/2011	-0.17	12.03	12.03	0.89	6.28	36.90	13.42	11.79	6.78	6.31
LVIP T. Rowe Price 2060 Fund - Standard Class <sup>6,8,10</sup>	AsA	04/30/2020	-0.18	12.65	12.65	0.87	6.40	39.16	N/A	N/A	N/A	41.55
<b>Risk Managed - US Mid Cap</b>												

# Performance Update

## Monthly hypothetical performance adjusted for contract fees \*

Investment Options	Inception Date	Change from Previous Day	Average Annual Total Return (%) as of 6/30/2021									
			YTD as of 06/30/2021	YTD as of 06/30/2021	1 Mo	3 Mo	1 Yr	3 Yr	5 Yr	10 Yr	Since Incep.	
LVIP Blended Mid Cap Managed Volatility Fund - Standard Class <sup>4, 10, 11, 13</sup>	RMUSM 05/01/2001	-0.58	6.18	6.18	4.97	8.38	32.15	15.98	16.12	7.08	5.13	
LVIP JPMorgan Select Mid Cap Value Managed Volatility Fund - Standard Class <sup>4, 10, 11, 13</sup>	RMUSM 05/01/2001	0.31	20.09	20.09	-1.55	5.47	46.21	7.46	7.89	6.35	6.33	
<b>Risk Managed - Global/International</b>												
LVIP Franklin Templeton Global Equity Managed Volatility Fund - Standard Class <sup>1, 10, 11</sup>	RMGI 08/01/1985	-0.18	11.54	11.54	-0.21	6.22	35.61	8.33	9.68	5.51	7.23	
LVIP SSGA International Managed Volatility Fund - Standard Class <sup>1, 6, 10, 11</sup>	RMGI 12/31/2013	-0.93	8.12	8.12	-1.74	5.01	29.64	3.77	5.96	N/A	1.57	

\* These returns are measured from the inception date of the fund and predate its availability as an investment option in the variable annuity (separate account). This hypothetical representation depicts how the investment option would have performed had the fund been available in the variable annuity during the time period. It includes deductions for the M&E charge and the contract administrative fee. If selected above, the cost for the i4LIFE® Advantage feature or a death benefit will be reflected. The cost for other riders with quarterly charges is not reflected. No surrender charge and no annual contract charge is reflected.

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# Performance Update

**1 International**

Investing internationally involves risks not associated with investing solely in the United States, such as currency fluctuation, political or regulatory risk, currency exchange rate changes, differences in accounting and the limited availability of information.

**2 Sector Funds**

Funds that target exposure to one region or industry may carry greater risk and higher volatility than more broadly diversified funds.

**3 Asset Allocation Portfolios**

Asset allocation does not ensure a profit, nor protect against loss in a declining market.

**4 Small & Mid Cap**

Funds that invest in small and/or midsize company stocks may be more volatile and involve greater risk, particularly in the short term, than those investing in larger, more established companies.

**5 Macquarie Investment Management**

Investments in Delaware VIP Series, Delaware Funds, Ivy Variable Insurance Portfolios, Ivy Funds, LVIP Delaware Funds or Lincoln Life accounts managed by Macquarie Investment Management Advisers, a series of Macquarie Investments Management Business Trust, are not and will not be deposits with or liabilities of Macquarie Bank Limited ABN 46 008 583 542 and its holding companies, including their subsidiaries or related companies, and are subject to investment risk, including possible delays in repayment and loss of income and capital invested. No Macquarie Group company guarantees or will guarantee the performance of the fund, the repayment of capital from the fund, or any particular rate of return.

**6 Fund of funds**

Each fund is operated as a fund of funds that invests primarily in one or more other funds, rather than in individual securities. A fund of this nature may be more expensive than other investment options because it has additional levels of expenses. From time to time, the Fund's advisor may modify the asset allocation to the underlying funds and may add new funds. A Fund's actual allocation may vary from the target strategic allocation at any point in time. Additionally, the Fund's advisor may directly manage assets of the underlying funds for a variety of purposes.

**7 Alternative Funds**

Certain funds (sometimes called "alternative funds") expect to invest in (or may invest in some) positions that emphasize alternative investment strategies and/or nontraditional asset classes and, as a result, are subject to the risk factors of those asset classes and/or investment strategies. Some of those risks may include general economic risk, geopolitical risk, commodity-price volatility, counterparty and settlement risk, currency risk, derivatives risk, emerging markets risk, foreign securities risk, high-yield bond exposure, index investing risk, exchange-traded notes risk, industry concentration risk, leveraging risk, real estate investment risk, master limited partnership risk, master limited partnership tax risk, energy infrastructure companies risk, sector risk, short sale risk, direct investment risk, hard assets sector risk, active trading and "overlay" risks, event-driven investing risk, global macro strategies risk, temporary defensive positions and large cash positions. If you are considering investing in alternative investment funds, you should ensure that you understand the complex investment strategies sometimes employed and be prepared to tolerate the risks of such asset classes. For a complete list of risks, as well as a discussion of risk and investment strategies, please refer to the fund's prospectus. The fund may invest in derivatives, including futures, options, forwards and swaps. Investments in derivatives may cause the fund's losses to be greater than if it invested only in conventional securities and can cause the fund to be more volatile. Derivatives involve risks different from, or possibly greater than, the risks associated with other investments. The fund's use of derivatives may cause the fund's investment returns to be impacted by the performance of securities the fund does not own and may result in the fund's total investment exposure exceeding the value of its portfolio.

**8 Target-date funds**

The target date is the approximate date when investors plan to retire or start withdrawing their money. Some target-date funds make no changes in asset allocation after the target date is reached; other target-date funds continue to make asset allocation changes following the target date. (See the prospectus for the funds allocation strategy.) The principal value is not guaranteed at any time, including at the target date. An asset allocation strategy does not guarantee performance or protect against investment losses. A "fund of funds" may be more expensive than other types of investment options because it has additional levels of expenses.

**9 REIT**

A real estate investment trust (REIT) involves risks such as refinancing, economic conditions in the real estate industry, declines in property values, dependency on real estate management, changes in property taxes, changes in interest rates and other risks associated with a portfolio that concentrates its investments in one sector or geographic region.

**10 Manager of managers funds**

Subject to approval of the fund's board, Lincoln Investment Advisors Corporation (LIAC) has the right to engage or terminate a subadvisor at any time, without a shareholder vote, based on an exemptive order from the Securities and Exchange Commission. LIAC is responsible for overseeing all subadvisors for funds relying on this exemptive order.

**11 Managed Volatility Strategy**

The fund's managed volatility strategy is not a guarantee, and the fund's shareholders may experience losses. The fund employs hedging strategies designed to reduce overall portfolio volatility. The use of these hedging strategies may limit the upside participation of the fund in rising equity markets relative to unhedged funds, and the effectiveness of such strategies may be impacted during periods of rapid or extreme market events.

**12 Bonds**

The return of principal in bond funds is not guaranteed. Bond funds have the same interest rate, inflation, credit, duration, prepayment and market risks that are associated with the underlying bonds owned by the fund or account.

**13 Multimanager**

For those funds that employ a multimanager structure, the fund's advisor is responsible for overseeing the subadvisors. While the investment styles employed by the fund's subadvisors are intended to be complementary, they may not, in fact, be complementary. A multimanager approach may result in more exposure to certain types of securities risks and in higher portfolio turnover.

**14 Floating rate funds**

Floating rate funds should not be considered alternatives to CDs or money market funds and should not be considered as cash alternatives.

**15 High-yield or mortgage-backed funds**

High-yield funds may invest in high-yield or lower rated fixed income securities (junk bonds) or mortgage-backed securities with exposure to subprime mortgages, which may experience higher volatility and increased risk of nonpayment or default.

# Performance Update

## <sup>16</sup> Risk Management Strategy

The fund's risk management strategy is not a guarantee, and the funds shareholders may experience losses. The fund employs hedging strategies designed to provide downside protection during sharp downward movements in equity markets. The use of these hedging strategies may limit the upside participation of the fund in rising equity markets relative to other unhedged funds, and the effectiveness of such strategies may be impacted during periods of rapid or extreme market events.

## <sup>17</sup> Money Market Funds

You can lose money by investing in the fund. Although the fund seeks to preserve the value of your investment at \$1.00 per share (or, for the LVIP Government Money Market Fund, at \$10.00 per share), it cannot guarantee it will do so. An investment in the fund is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency. The fund's sponsor has no legal obligation to provide financial support to the fund, and you should not expect that the sponsor will provide financial support to the fund at any time.

## <sup>18</sup> Index

An index is unmanaged, and one cannot invest directly in an index. Indices do not reflect the deduction of any fees.

## <sup>19</sup> Emerging Markets

Investing in emerging markets can be riskier than investing in well-established foreign markets. International investing involves special risks not found in domestic investing, including increased political, social and economic instability, all of which are magnified in emerging markets.

## <sup>20</sup> MSCI

The fund described herein is indexed to an MSCI® index. It is not sponsored, endorsed, or promoted by MSCI®, and MSCI®; bears no liability with respect to any such fund or to an index on which a fund is based. The prospectus and statement of additional information contain a more detailed description of the limited relationship MSCI®; has with Lincoln Investment Advisors Corporation and any related funds.

## <sup>21</sup> S&P

The Index to which this fund is managed is a product of S&P Dow Jones Indices LLC (SPDJI) and has been licensed for use by one or more of the portfolio's service providers (licensee). Standard & Poor's®; and S&P® are registered trademarks of Standard & Poor's Financial Services LLC (S&P); Dow Jones® is a registered trademark of Dow Jones Trademark Holdings LLC (Dow Jones); and these trademarks have been licensed for use by SPDJI and sublicensed for certain purposes by the licensee. S&P®, S&P GSCI® and the Index are trademarks of S&P and have been licensed for use by SPDJI and its affiliates and sublicensed for certain purposes by the licensee. The Index is not owned, endorsed, or approved by or associated with any additional third party. The licensee's products are not sponsored, endorsed, sold or promoted by SPDJI, Dow Jones, S&P, their respective affiliates, or their third party licensors, and none of these parties or their respective affiliates or third party licensors make any representation regarding the advisability of investing in such products, nor do they have liability for any errors, omissions, or interruptions of the Index®.

## <sup>22</sup> Exchange-traded funds

Exchange-traded funds (ETFs) in this lineup are available through collective trusts or mutual funds. Investors cannot invest directly in an ETF.

## Important Disclosures

Variable products are issued by The Lincoln National Life Insurance Company, Fort Wayne, IN, distributed by Lincoln Financial Distributors, Inc., and offered by broker/dealers with an effective selling agreement. The Lincoln National Life Insurance Company is not authorized nor does it solicit business in the state of New York.

**Contractual obligations are backed by the claims-paying ability of The Lincoln National Life Insurance Company.**

Limitations and exclusions may apply.

Lincoln Financial Group is the marketing name for Lincoln National Corporation and its affiliates. Affiliates are separately responsible for their own financial and contractual obligations.

## Asset Categories

RM	= Risk Managed
MCA	= Maximum Capital Appreciation
LTG	= Long Term Growth
GI	= Growth and Income
I	= Income
RMAA	= Risk Managed - Asset Allocation
PC	= Preservation of Capital
RMUSL	= Risk Managed - US Large Cap
AsA	= Asset Allocation
RMUSM	= Risk Managed - US Mid Cap
RMGI	= Risk Managed - Global/International

**DISTRICT  
CORRESPONDENCE**  
Board Meeting of July 5, 2021



**Date:                    Correspondence Sent To:**

1. 06/28/2021    The Honorable Alan Lowenthal  
                         U.S. House of Representatives  
**Subject:** INVEST in America Act (H.R. 3684)
  - Sarah Saperstein  
      Senior Associate, ENS Resources
  - Jessica Gauger  
      CASA Director of Legislative Advocacy & Public Affairs
  
2. 07/02/2021    California Regional Water Quality Control Board  
                         Central Coast Region  
**Subject:** Monitoring and Reporting Review

**Date:                    Correspondence Received From:**

1. 06/30/2021    Jason Dow, President  
**Subject:** CASA ANNUAL BUSINESS MEETING  
                 August 11-13, 2021, Hilton San Diego Bayfront, San Diego, CA

***Hard Copies of the Correspondence are available at the District's Office for review***