

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 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
SPECIAL MEETING OF THE GOVERNING BOARD
OF THE GOLETA SANITARY DISTRICT
A PUBLIC AGENCY

One William Moffett Place
Goleta, California 93117

August 18, 2021

CALL TO ORDER: 3:00 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 August 2, 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 24 hours in advance of the meeting.

BUSINESS:

1. REPORT ON CALIFORNIA ASSOCIATION OF SANITATION AGENCIES 2021 ANNUAL CONFERENCE
2. UPDATE AND DISCUSSION OF OUTREACH PLAN FOR TRANSITION TO DISTRICT-BASED ELECTIONS
(Board may take action on this item.)
3. GENERAL MANAGER’S REPORT
4. LEGAL COUNSEL'S REPORT
5. COMMITTEE/DIRECTOR'S REPORTS AND APPROVAL/RATIFICATION OF DIRECTOR’S ACTIVITIES

6. PRESIDENT'S REPORT
7. ITEMS FOR FUTURE MEETINGS
8. CORRESPONDENCE
(The Board will consider correspondence received by and sent by the District since the last Board Meeting.)
9. 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 24 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.

Persons with a disability who require any disability-related modification or accommodation, including auxiliary aids or services, in order to participate in the meeting are asked to contact the District's Finance & H.R. Manager at least 2 hours prior to the meeting by telephone at (805) 967-4519 or by email at info@goletasanitary.org.

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

August 2, 2021

- CALL TO ORDER:** President Smith called the meeting to order at 6:30 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
Nate Kowalski, Partner, Atkinson, Andelson, Loya, Ruud & Romo
- APPROVAL OF MINUTES:** Director Majoewsky made a motion, seconded by Director Rose, to approve the minutes of the Regular Board meeting of 07/19/21. The motion carried by the following vote:
- (21/08/2223)
- | | | |
|----------|---|---|
| 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. REVIEW AND CONSIDERATION OF LEGAL SERVICES AGREEMENT WITH ATKINSON, ANDELSON, LOYA, RUUD & ROMO FOR PERSONNEL RELATED MATTERS

Mr. Wagner gave the staff report and introduced Nate Kowalski.

Director Majoewsky made a motion, seconded by Director Emerson to engage Atkinson, Andelson, Loya, Ruud & Romo for legal services and authorize the General Manager to execute the engagement letter.

The motion carried by the following vote:

(21/08/2224)

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

2. CONSIDERATION OF PROFESSIONAL SERVICES AGREEMENT FOR PHASE II OF THE COMPETENCY BASED TRAINING PROGRAM

Mr. Wagner gave the staff report.

Director Majoewsky made a motion, seconded by Director Emerson to approve and authorize the General Manager to sign a Professional Services Agreement, in the form or an addendum to proposal, in an amount not to exceed \$63,150 for Phase II of the Competency Based Training Program with DKF Solutions.

The motion carried by the following vote:

(21/08/2225)

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

3. PROPOSED ANNEXATION FOR THE SMITH PROPERTY AT 5965 LA GOLETA ROAD APN 069-070-047 AND THE BARBARIA PROPERTY AT 5970 LA GOLETA ROAD APN 069-050-004 GOLETA CA

Mr. Wagner gave the staff report.

Director Fuller made a motion, seconded by Director Rose to direct the General Manager to advise Santa Barbara LAFCO that the Board has no objection to the proposed

annexation for the Smith property at 5965 La Goleta Road, APN 069-070-047, nor the Barbara property at 5970 La Goleta Road, APN 069-050-004.

The motion carried by the following vote:

(21/08/2226)

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

4. REVIEW AND CONSIDERATION OF PERSONNEL SHARING AGREEMENT WITH CARPINTERIA SANITARY DISTRICT

Mr. Wagner gave the staff report.

Director Majoewsky made a motion, seconded by Director Emerson to approve and authorize the General Manager to execute the Cooperative Use Agreement with Carpinteria Sanitary District.

The motion carried by the following vote:

(21/08/2227)

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 a review of Directors' reporting process on meetings attended at the expense of the District. He also presented information on the annexation process, including notice of sewer service charges placed on the tax roll.

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

Director Fuller – No report.

Director Emerson – Distributed copies of articles of interest.

Director Majoewsky – Reported on the Goleta West Sanitary District meeting he attended.

Director Rose – Reported on the upcoming Local Chapter CSDA meeting scheduled for August 23, 2021.

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 Majoewsky made a motion, seconded by Director Emerson, to ratify and approve the claims, for the period 07/20/21 to 08/02/21 as follows:

Running Expense Fund #4640	\$ 660,517.79
Capital Reserve Fund #4650	\$ 59,351.10
Depreciation Replacement Reserve Fund #4655	\$ 30,844.51
Retiree Health Insurance Sinking Fund #4660	\$ 11,297.52

The motion carried by the following vote:

(21/08/2228)

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

ADJOURNMENT

There being no further business, the meeting was adjourned at 7:42 p.m.

Jerry D. Smith
Governing Board President

Robert O. Mangus, Jr.
Governing Board Secretary

Steven T. Majoewsky

George W. Emerson

Sharon Rose

Edward Fuller

AGENDA ITEM #1

AGENDA ITEM: 1

MEETING DATE: August 18, 2021

I. NATURE OF ITEM

Report on California Association of Sanitation Agencies 2021 Annual Conference

II. BACKGROUND INFORMATION

The California Association of Sanitation Agencies (CASA) 2021 Annual Conference was held on August 11-13, 2021 at the Hilton Bayfront Hotel in San Diego, California. Board Member George Emerson, General Manager Steve Wagner, and Management Analyst Laura Romano attended the conference. A verbal report of the conference will be provided at the meeting. A copy of the conference program is attached to this report.

III. COMMENTS AND RECOMMENDATIONS

Since this report is for information purposes only, no Board action is required at this time.

IV. REFERENCE MATERIALS

CASA 2021 Annual Conference Program



PROGRAM

Building a Resilient Future



2021 66th Annual Conference | August 11-13 | Hilton San Diego Bayfront | San Diego, CA

CASAweb.org



[@CASACleanWater](https://www.facebook.com/CASACleanWater)



[@CASA_CleanWater](https://twitter.com/CASA_CleanWater)

Executive Director's Message

Adam D. Link
Executive
Director



Welcome to CASA's 66th Annual Conference! We are excited to be hosting our first in person event since January of 2020. We have missed seeing all of you this last year!

The theme of this year's conference is "Building a Resilient Future." If the last year and a half has taught us anything, it is that we need to be adaptable, prepared for the unexpected, and ready to embrace a future that will bring an entirely new set of challenges. In a word, we need to be resilient. Our program will provide real life examples of resiliency in the face of adversity, and essential information on the current drought, the future of work, and communicating with diverse constituencies.

It has been a tough year for everyone, and we are so proud that CASA's agencies have not only weathered these trying times; but thrived. Your incredible response comes as no surprise given your track record of responding to droughts, wildfires, and the array of challenges that wastewater agencies encounter. Wastewater agencies are truly the everyday heroes, finding new ways to protect public health and safety and communicating critical information to stakeholders and customers during unprecedented times. I am very excited to host my first in-person Annual Conference as your Executive Director and hear stories about how much has changed at your agencies since the last time we met.

Despite navigating remote work and being unable to meet in person, CASA has been exceptionally productive over the past year. Thanks to the dedication and adaptability of our staff and members, we successfully hosted two virtual conferences, and dramatically expanded our webinar and virtual meeting offerings. We also adopted a new five-year strategic plan that will serve as a blueprint for the future of the organization, and launched CASA LEAD, a program that I am very proud of, and that you will hear much more about in the years to come. CASA has continued to make significant progress on one of the key issues for our members: non-flushable wipes. We anticipate our sponsored California non-flushable wipes labeling legislation to be passed and signed this year, and are also supporting similar legislation introduced in Congress. Several states are following CASA's lead in seeking legislation to address this important issue.

Thanks to the efforts of our membership committee and staff, even in a year where there were serious questions about the impact of the pandemic on the economy and local agency budgets, 99% of CASA agency members renewed, and we welcomed two new member agencies.

I am proud of the clean water community and it is truly a privilege to share stories of your success with legislators, regulators, and other associations. Thank you for your continued support and all that you do, and we hope you enjoy the conference!

The Annual Conference is **MOBILE!**



To Install...

1. Go to your App Store and search for **CASA Events**, or
2. Simply scan one of the QR Codes!



iOS Devices



Android Devices



OLD ADDRESS:

CASA
1225 8th Street, Suite 595
Sacramento, CA 95814
916.446.0388
CASAweb.org

NEW ADDRESS:

CASA
925 L Street, Suite 200
Sacramento, CA 95814
916.446.0388
CASAweb.org

Program

NOTE: All CASA sessions will be held on the 4th Floor unless otherwise indicated.

WEDNESDAY, AUGUST 11, 2021

8:00 a.m. – 11:30 a.m.	CSRMA Training Seminar (Separate Registration Required)	Indigo A, 2nd Floor
9:00 a.m. – 5:00 p.m.	Registration	Sapphire North Foyer
10:30 a.m. – 12:00 p.m.	CASA Board of Directors Meeting	Sapphire 410
12:00 p.m. – 1:30 p.m.	Associates Committee Meeting Hear a special presentation from a panel of young professionals as they provide their perspective on the workplace and their careers in the wake of the pandemic.	Sapphire MN
12:00 p.m. – 1:30 p.m.	Lunch on Your Own	
1:30 p.m. – 4:00 p.m.	Concurrent Sessions	
1:30 p.m. – 2:30 p.m.	Fleet Tracking, Electrification and AI: Clean Water Tech in 2021 Moderator: Greg Kester, CASA Barbara Egan, RMJ Technologies David Rothbart, Los Angeles County Sanitation District Cristina Ahmadpour, Isle Utilities Technologies that help track your agency's fleet behavior to improve operations? An all-electric future in California? Using artificial intelligence to help efficiently manage your collection system? Hear from panelists on current and future trends in the clean water sector and get a glimpse of how agencies are utilizing technology to build a resilient future.	Sapphire 411
1:30 p.m. – 2:30 p.m.	The Future of Work is Now Moderator: Eileen White, East Bay Municipal Utility District Adriana Ochoa, Procopio Roland Williams, Castro Valley Sanitary District The pandemic brought so many changes to the way we live and work. Are some of these changes here to stay? Hear from the experts on how clean water agencies are adapting to the possibility of remote work, virtual meetings, community engagement and other changes we have all experienced this past year.	Sapphire EF
2:30 p.m. – 3:00 p.m.	Break	

WEDNESDAY, AUGUST 11, 2021 CONTINUED

3:00 p.m. – 4:00 p.m.	Regulatory Hot Topics and Deep Dives Moderator: Jared Voskuhl, CASA Greg Kester, CASA (SB 1383) Steve Jepsen, SCAP (SSS WDR) Jared Voskuhl, CASA (Microplastics) Ryan Batjiaka, SFPUC (Region 2 PFAS Study) Sarah Deslauriers, CASA (Air Toxics) CASA's Regulatory Workgroup is one of the most active groups in the association. Hear the latest updates on topics essential to your agency's regulatory compliance and learn how CASA members are collaborating with researchers and policy makers on the development and implementation of regulations, including an update of the Sanitary Sewer System Waste Discharge Requirements (SSS WDR), findings and results from the Bay Area PFAS study, statewide developments on microplastics methods, health effects, and the Ocean Protection Council's study of treatment technology removal effectiveness, new air toxics and emissions rules, and implementation nuances of SB 1383 organics diversion regulations, all of which the group is working to address on behalf of CASA member agencies.	Sapphire EF
3:00 p.m. – 4:00 p.m.	Gender Diversity and Pay Equity in the Workforce Moderator: Jackie Zipkin, East Bay Dischargers Authority Beverli Marshall, Valley Sanitary District Kathleen Welter, Woodard & Curran Equity and diversity are essential components of managing a successful agency and have increasingly come into focus in recent years. Hear from both private entities and public agencies who have looked at this issue and implemented successful programs to address diversity and equity in their workforces.	Sapphire 411
4:00 p.m. – 5:00 p.m.	Federal Legislative Committee Meeting	Sapphire IJ
4:00 p.m. – 5:00 p.m.	CSRMA Executive Board Meeting	Cobalt 500, 5th Floor
5:30 p.m. – 6:30 p.m.	Ice Breaker Reception (outdoors)	Sapphire Terrace/West Foyer

Program

THURSDAY, AUGUST 12, 2021

7:30 a.m. – 9:00 a.m.	Breakfast (outdoors)	Sapphire Terrace/West Foyer
8:00 a.m. – 9:00 a.m.	Women’s Networking Breakfast Look for signage to join this informal networking group during breakfast.	
7:30 a.m. – 9:00 a.m.	CSRMA Board of Directors Meeting	Indigo A, 2nd Floor
7:30 a.m. – 4:30 p.m.	Registration	Sapphire North Foyer
8:00 a.m. – 9:00 a.m.	CASA Education Foundation Board Meeting	Sapphire 411
9:15 a.m. – 11:30 a.m.	Morning Sessions & Business Meeting President Jason Dow, Presiding	Sapphire AB
9:15 a.m. – 10:00 a.m.	Jen McDonough, Celebrating the Everyday Hero Jen’s keynote on celebrating everyday heroes will address the challenges experienced daily by our essential workers and how to overcome those challenges so we can lead from a place of strength. Jen McDonough reminds everyday heroes of the importance of their work and acknowledges the vital impact that they have on their communities and organizations.	
10:00 a.m. – 11:15 a.m.	Communicating with Diverse Constituencies Moderator: Sarah Macdonald, Western Municipal Water District Victor Griego, Water Education for Latino Leaders (WELL) Gabriela Dow, NV5 Tonya Durrell, City of Los Angeles, LASan Hear from association leaders and communications professionals on how to build bridges with diverse constituencies in your community and develop programs to communicate the clean water community’s message.	
11:15 a.m. – 11:30 a.m.	Annual Business Meeting	
11:30 a.m. – 12:00 p.m.	Networking Opportunity	Sapphire Terrace/West Foyer
12:00 p.m. – 1:00 p.m.	Luncheon (outdoors)	Sapphire Terrace
1:00 p.m. – 1:30 p.m.	Networking Opportunity	Sapphire Terrace/West Foyer
1:30 p.m. – 3:30 p.m.	Afternoon Sessions Secretary Treasurer Georgean Vonheeder-Leopold, Presiding	Sapphire AB
1:30 p.m. – 2:30 p.m.	Drought on the Horizon Sean Maguire, Board Member, State Water Resources Control Board California is in the midst of yet another extremely dry period, and both the state and local agencies are taking emergency actions to try and address some of the most severe impacts. Hear what is being done from the State Water Board perspective, what lessons we learned from the last multi-year drought, and how water shortages can impact water and wastewater agencies alike.	

THURSDAY, AUGUST 12, 2021 CONTINUED

2:30 p.m. – 3:30 p.m.	Celebrating Excellence in 2021 2021 Awards of Excellence Presentation CASA Education Foundation 2021 Scholarship Recipients CASA LEAD Initiative	
3:45 p.m. – 4:45 p.m.	Associates Engineering and Research Subcommittee	Sapphire 411
3:45 p.m. – 4:45 p.m.	CASA Communications Committee	Sapphire 410
4:30 p.m. – 5:30 p.m.	Statewide Biosolids Hot Topics & Solutions Meeting	Sapphire EF
5:30 p.m. – 6:30 p.m.	Welcome Back Reception (outdoors)	Sapphire Terrace

FRIDAY, AUGUST 13, 2021

8:00 a.m. – 11:15 a.m.	Registration	Sapphire North Foyer
8:00 a.m. – 9:30 a.m.	Breakfast (outdoors)	Sapphire Terrace/West Foyer
8:00 a.m. – 9:15 a.m.	State Legislative Committee Meeting	Sapphire EF
9:30 a.m. – 11:15 a.m.	Closing Session Vice President Jasmin Hall, Presiding	Sapphire AB
9:30 a.m. – 10:00 a.m.	State and Federal Legislative Updates Jessica Gauger, CASA, State Update Eric Sapirstein, ENS Resources, Federal Update	
10:00 a.m. – 10:45 a.m.	Resilience in Real Life Kevin Phillips, Town Manager, Paradise, CA The 2018 fires that nearly destroyed the town of Paradise were a terrible tragedy and emblematic of the increasing threats from California's wildfires. Hear from the new Town Manager of Paradise on what they are doing to rise from the ashes, including development of an entirely new wastewater collection system.	
10:45 a.m. – 11:15 a.m.	President's Closing Remarks Board of Director Election Results Passing of the Gavel	
11:00 a.m. – 3:00 p.m.	Attorneys Committee Meeting	Sapphire EF

Speakers



CRISTINA AHMADPOUR, ISLE UTILITIES

Cristina Ahmadpour serves as Managing Director of Isle's Americas business. She leads a team that supports the most progressive water utilities in their interest to identify, evaluate, and engage best-available solutions that drive value to their services and business operations. Facilitating an assessment of needs and identifying solutions that respond to top priorities has been an integral part of how she works with water utility leaders today. Cristina is a graduate of WEF's Water Leadership Institute and has been recognized by the Water and Wastewater Digest in 2016 and 2018 as a top water professional under the age of 40.

She graduated (summa cum laude) from Vermont Law School with a Masters in Environmental Law, emphasis in Energy, and received her Bachelors of Science Degree in Business Administration, Emphasis in Global Business Management from California State University.



RYAN BATJIAKA, SAN FRANCISCO PUBLIC UTILITIES COMMISSION

Ryan Batjiaka coordinates the biosolids program at the San Francisco Public Utilities Commission. He has worked in agriculture and the composting industry and has a master's in soil science from the University of Washington. Ryan believes strongly that wastewater resource recovery will be critical in addressing California's looming environmental challenges.



SARAH DESLAURIERS, CAROLLO

Sarah Deslauriers is employed by Carollo Engineers, Inc. (since 2005) serving as their National Climate Change and Resilience Lead. Sarah has served as the California Association of Sanitation Agencies' (CASA) subject matter expert on climate change since 2016, overseeing the Air Quality, Climate Change and Energy Workgroup. She tracks and coordinates responses to developing legislation, regulatory issues, and policy initiatives that impact the wastewater sector and proactively engages state agencies in discussions on both mitigation and adaptation related issues to create opportunities for the wastewater sector in building resilient communities.

Sarah holds a Bachelor of Science and Masters of Science in Atmospheric, Oceanic, and Space Science, a Masters of Science in Engineering in Environmental and Water Resources Engineering, and a graduate certificate in the Program of Industrial Ecology from the University of Michigan. Sarah is also a registered professional engineer and credentialed Envision Sustainability Professional.



GABRIELA DOW, NV5

Gabriela Dow is a communications specialist with more than 25 years of experience in public outreach, facilitation and public affairs. Her current focus at NV5 includes managing programs for public agencies and developing a communications strategy that include facilitation on sensitive topics. She is experienced in inclusive public outreach and engagement, development of key messages and incorporation of digital/social media technology with traditional methods to engage difficult to reach stakeholders and disadvantaged communities. Gabriela's career began in print journalism and television news, including work at two CNN bureaus and KCBS News. Her political experience includes press advance for a presidential campaign and work at the White House Office of Public Liaison (known today as the Office of Public Engagement). Gabriela also worked as an intergovernmental affairs officer for Governor Pedro Rossello before joining a San Diego public affairs firm where she managed public outreach programs for major environmental and public works projects.

Gabriela has a BA in English, Literature, and Communications from the University of CA, Los Angeles and Journalism and Int'l Relations at Universidad Complutense in Madrid, Spain (via UCLA).

TONYA DURRELL, CITY OF LOS ANGELES, LASAN



BARBARA EGAN, RMJ TECH

Barbara Egan represents RMJ Technologies as an industry veteran with an extensive telematics and technology background. She recently worked as Sales Director at Lytx, Inc., focusing on video telematics and government accounts

in the western region. Prior to this, Barbara worked many years at Verizon Networkfleet as a Strategic Account Manager, Public Sector. She also has extensive experience selling into Enterprise and heavy equipment companies. For the past seven years, Barbara is proud to be the Pacific Southwest NAFA Reception Committee Chair and is a sought-after speaker related to Driver Behavior. She is an active member and speaker at PARMA and PRIMA.



VICTOR GRIEGO, WATER EDUCATION FOR LATINO LEADERS (WELL)

Victor Griego is the Board President and Founder of Water Education for Latino Leaders (WELL). Mr. Griego brought

together leaders across California to establish WELL, whose mission is to ensure that local Latino decision makers have a comprehensive understanding of water policy. Currently, Mr. Griego produces the only Latino owned and focused political newsletter mailed to 1.5 million voters during every California election cycle. Mr. Griego is also the producer of LA Alliance, a television program that provides an accurate representation of the relationship between Latinos and African Americans in Southern California. He holds a Bachelor of Arts degree in political science from Whittier College and a Master of Arts in political science from Claremont Graduate University.



STEVE JEPSEN, SOUTHERN CALIFORNIA ALLIANCE OF POTWS

Steve Jepsen is the Executive Director for the Southern California Alliance of Publicly Owned Treatment Works (SCAP).

Mr. Jepsen started a career in civil engineering consulting in Southern California back in 1981 with an emphasis on water, wastewater and stormwater projects with an environmental compliance focus. He began working with the SCAP Collection Systems Committee in 2006. Mr. Jepsen has been serving as the Executive Director for SCAP since 2016. SCAP represents over 80 public agencies in seven counties of Southern California. SCAP works closely with CASA and the other Clean Water Summit Partners monitoring upcoming regulations with the goal of collaboration with regulators to prevent promulgation of regulations that are impractical for water and wastewater agencies. Once regulations are passed, SCAP assists members with approaches for compliance through education and guidance from six specialty committees.



SEAN MAGUIRE, STATE WATER RESOURCES CONTROL BOARD

Sean Maguire was appointed to the State Water Resources Control Board in December 2018 by Governor Brown and

is a registered civil engineer. Mr. Maguire has had a diverse career both in both public service and as an engineering consultant, which provides a valuable perspective of the administrative challenges facing a government agency and needs of a broad array of water interests.

From 2015-2018, Mr. Maguire worked for the State Water Resources Control Board as a manager of the Storm Water Grant Program in the Division of Financial Assistance, and later as a manager in the Division of Water Rights where he oversaw administration of water right change petitions, licensing, and cannabis cultivation permitting. Prior to joining the Board, from 2003-2015, he worked for an engineering consulting firm serving a variety of municipalities and water agencies throughout the state, focused on water resources planning, drinking water, and wastewater infrastructure projects. Much of his work revolved around integrated water management and developing long-term water supply solutions to meet the needs of both water users and the environment.

Mr. Maguire has a Bachelor of Science in Civil Engineering from California State University, Sacramento.



BEVERLI MARSHALL, VALLEY SANITARY DISTRICT

Beverli Marshall is a 25-year veteran in state, county, and local public agencies. She has over 10 years of experience in the wastewater industry and over 20 years in public sector budget, labor relations,

and policy administration. As a neurodivergent individual, she advocates for and is a public speaker on, the need for diversity, acceptance, and inclusion in the workplace. She is currently a doctoral candidate working on her Doctorate in Business Administration and her dissertation on how employment programs that target neurodifferent individuals can improve the workplace and create a competitive advantage.

Speakers



JEN MCDONOUGH

They Call Her The Iron Jen Because...

She learned to navigate the medical system when one of her four children was diagnosed with a lifelong medical condition. When that health crisis left

Jen's family financially and emotionally devastated, they paid off more than \$212,000 in debt and medical expenses in 4 years. She challenged herself to go from a couch potato to an Ironman triathlete. Jen is also an eight-time national Olympic-style weightlifter, the winner of two U.S. Olympic Festival Medals and a Minnesota Hall of Fame inductee. In 2014, she completed training to become a volunteer firefighter and first responder where she served for 6 years. This service to her local community gave her personal insight into the high-stakes, high-pressure careers of first responders. With 20-plus years in hospital administration, she has a deep appreciation for those working in high-stress environments. Jen is the author of three Amazon Top 100 books, including 5 Minutes a Day to Living Beyond Rich and Living Beyond Awesome.



ADRIANA OCHOA, PROCOPIO

Adriana R. Ochoa advises public agencies on issues relating to governance, the Ralph M. Brown Act, California Public Records Act, the Political Reform Act, Government Code 1090, the California Voting Rights Act, Proposition 218, public

works contracting, operational and business matters, as well as litigation. Adriana regularly advises joint powers authorities formed to acquire, construct and manage wastewater treatment facilities, and operate water recycling and other resource recovery programs. She has experience advising, creating and implementing new sewer and sanitation districts, and advises existing districts on spheres of influence, consolidation and boundary changes, and other LAFCO issues. She is experienced in handling litigation matters including construction litigation, contract disputes, Brown Act litigation, Proposition 218 litigation, eminent domain litigation for both public agencies and private property owners, and administrative hearings for public agencies.



KEVIN PHILLIPS, TOWN OF PARADISE

Kevin Phillips has been the Town Manager of the Town of Paradise since August of 2020. Mr. Phillips is leading the Town through recovery and rebuilding after the devastation from the Camp Fire.

Previous to working with the Town, Kevin spent 13 years with Paradise Irrigation District. During his time at Paradise Irrigation District, he served as the Finance and Accounting Manager, the CFO, and the District Manager. As District Manager, Kevin led the District through the difficult water restoration period after the Camp Fire.

As a Certified Public Accountant, Kevin worked with Matson & Isom Accountancy Corporation (Chico, CA) from 2000 to 2007. He attended Cal Poly, San Luis Obispo, where he earned a Bachelor of Science in Business Administration, with a concentration in Accounting and Finance.



DAVID ROTHBART, LOS ANGELES COUNTY SANITATION DISTRICTS

David Rothbart is a professional Civil Engineer with over 30 years of experience in the wastewater and solid waste

management field. He is currently Air Quality Engineering Section Manager for the Los Angeles County Sanitation Districts. In that capacity he is responsible for air quality compliance for all Sanitation District's wastewater treatment plants and landfills. One of these facilities is the Joint Water Pollution Control Plant in Carson, California, which has a permitted capacity of 400 MGD. He is also responsible for air quality compliance at Tulare Lake Compost and material recovery and transfer facilities. Most of these facilities are located in the South Coast Air Basin and are equipped with state-of-the-art air pollution controls. He serves as the primary liaison with the California Air Resources Board, South Coast Air Quality Management District and other air quality agencies. Mr. Rothbart is active in several professional societies and is currently the Chair of the Air Quality Committee for the Southern California Alliance of Publicly Owned Treatment Works.



**KATHLEEN WELTER,
WOODARD & CURRAN**

Kathleen Welter leads the Human Resources team for Woodard & Curran, an integrated engineering, science and operations company serving public and private clients locally and nationwide.

Kathleen has more than 25 years of experience working within and with companies to ensure they have the talent needed to deliver organizational priorities. Earlier in her career, Kathleen held leadership roles overseeing all functions of Human Resources, including Talent Management, Talent Strategy and Leadership Continuity, as part of both small and large HR teams. Just prior to joining Woodard & Curran, she built a successful consulting practice serving a range of clients spanning diverse industries, including financial services, manufacturing, and utilities, providing her a broad perspective with particular strengths in addressing executive development and cultivating high-performing executive teams. She's led multiple organizations through the work of defining their Mission, Vision and Values as an essential foundation of aligning and engaging their talent to create a meaningful and rewarding employee experience.



**EILEEN WHITE,
EAST BAY MUNICIPAL
UTILITIES DISTRICT**

Eileen M. White is the Director of Wastewater for the East Bay Municipal Utility District (District) in Oakland,

California, which supplies water to approximately 1.4 million people and wastewater services to about 740,000 people. Eileen has more than 20 years of engineering experience in the wastewater, water, and power industries. As the Director of Wastewater, she is responsible for leading the Wastewater Department which includes planning, organizing, and leading the engineering, operations, and maintenance of the wastewater system to ensure efficient operations that meet all regulations. She also manages the laboratory, which provides analytical support for both wastewater and water operations. Prior to her appointment as the Director of Wastewater, Eileen was the Manager of Water Operations and the Chief Operator for the District for 17 years where she was responsible for the District's extensive raw water transmission system, water treatment plants, and distribution system. Before her appointment as the Manager of Water Operations, she was responsible for managing the District's \$189 million Seismic Improvement Program, including its short-term and long-range planning. Prior to joining the District, she was a Design Engineer for PG&E. Eileen has a Bachelor of Science in Civil Engineering from U.C. Berkeley, is a Registered Professional Engineer in the State of California, and has a Water Distribution Operator Grade 5 certificate.



**ROLAND WILLIAMS,
CASTRO VALLEY
SANITARY DISTRICT**

Roland Williams is the General Manager of the Castro Valley Sanitary District (CVSan). He has been with CV San 19

years, 12 years as the General Manager. Prior to coming to CVSan, Roland worked for Harris and Associates as a project manager and owner's representative on wastewater treatment plant projects. He has served on the CASA Utility Leadership Committee and is a member of CWEA, WEF, APWA, and has held various volunteer roles with these organizations. He is a father of two adult children and grandfather of two. His hobbies include fitness training, reading, travel, and spending time with family.



**JACKIE ZIPKIN,
EAST BAY DISCHARGERS
AUTHORITY**

Jackie Zipkin has over twenty years of experience in the water industry. Jackie currently serves as General Manager of the East Bay Dischargers Authority (EBDA),

a Joint Powers Authority that sustainably manages the discharge of wastewater from approximately one million East Bay residents to the San Francisco Bay. Prior to joining EBDA in 2018, Jackie served as Manager of Environmental Services at East Bay Municipal Utility District, where she managed environmental programs including the District's Resource Recovery and Wet Weather Programs. Jackie's career started in consulting, where she supported water and wastewater agencies around the world on a range of projects addressing sustainable water portfolio management. Jackie holds a B.S. and M.S. in Civil and Environmental Engineering from Stanford University and is a registered Professional Engineer in California.



2021 CONTRIBUTORS LIST

BUSINESS MEMBER SUPPORT \$5,000

CASA Associates
Central Contra Costa Sanitary District
HDR Engineering, Inc.

MEMBER SUPPORT \$2,500-2,000

Carollo Engineers
Irvine Ranch Water District
South Orange County Wastewater Authority

MEMBER SUPPORT \$1,000

Dublin San Ramon Services District
Fairfield-Suisun Sewer District
Goleta Sanitary District
Inland Empire Utilities Agency
Lystek International, Inc.
South Orange County Wastewater Authority

MEMBER SUPPORT \$500 - IN MEMORY OF RAY MILLER

California Association of Sanitation Agencies
Mike Dunbar

INDIVIDUAL MEMBER SUPPORT

Adam D. Link
Jan Lancaster
Robert Chirelli

THANK YOU FOR YOUR SUPPORT!

2019 SCHOLARSHIP RECIPIENTS



AIYANNA DUREPO
POINT LOMA NAZARENE UNIVERSITY

The ocean has always been a home away from home to Aiyanna Durepo. As a swimmer, aspiring surfer, lifeguard, and swim lesson instructor, water has been influential in her favorite activities. It is for this reason, that she has a profound appreciation and desire to help protect water in its natural ocean form. Aiyanna grew up exploring the beaches of Northern California, attending marine biology camps and conducting her own research on marine life and how human activity in the oceans has affected the longevity of various species. She believes the environment should be sustained because of its capability to educate about the power of nature and the science behind the operation of our planet. It is her desire to work as an environmental lawyer, specifically drafting and reviewing ocean policies and working alongside human organizations to ensure that their negative impact on water and marine life is as minimal as possible.

"I am grateful for the opportunity to increase my learning of environmental protection and policy, specifically related to the water as a resource, through the CASA Education Foundation and this scholarship."



LENA SCHORKOPF
UNIVERSITY OF CALIFORNIA, LOS ANGELES

Lena Schorkopf is an undergraduate at the University of California, Los Angeles pursuing a degree in Political Science. The importance of water conservation was instilled in her at a young age. Whether it be filling a bucket with water while the shower is heating up or abandoning the dream of a green lawn, Lena and her family have always found ways to make freshwater preservation a part of daily life. After completing her undergraduate education, Lena plans to attend law school and become an environmental lawyer. As an environmental lawyer, she hopes to challenge threats to the environment from the government and corporations in court and prevent further degradation of our natural resources. Lena's ultimate goal is a career in public office, where she will make passing environmentally minded legislation a top priority.

"I am extremely grateful to the CASA Education Foundation for selecting me as a scholarship recipient."




LENSAA TEMESGEN
UNIVERSITY OF CALIFORNIA, BERKELEY

Lensaa Temesgen will be a freshman at UC Berkeley's College of Natural Resources, majoring in Environmental Science this fall. She recently graduated from Middle College High School, a dual enrollment program school in partnership with local community college, Contra Costa College, which allowed her to also be a college student taking college courses. In high school she was chief editor of the yearbook, an avid member of the student council, and the chair of the conservation committee. It was there that she saw her interest in environmental studies grow by working to conserve her community. Lensaa was born and raised in the Bay Area and is excited to continue her studies there for the next four years at Cal.


"Thank you for selecting me for this scholarship."

Upcoming CASA Events



CLEAN WATER SUMMIT PARTNER VIRTUAL PFAS WEBINAR

September 1, 2021
1:00 – 4:30 PM Pacific Time



CASA/CWEA BIOSOLIDS AND RENEWABLE ENERGY SEMINAR

October 13, 2021
San Francisco Bay Regional Water Board
Oakland, CA



CASA/CWEA BIOSOLIDS AND RENEWABLE ENERGY SEMINAR

October 14, 2021
City of Los Angeles,
Sanitation Environmental Learning Center,
Hyperion WWTP
Los Angeles, CA



CASA WINTER CONFERENCE

January 19-21, 2022
Hilton Palms Springs Resort
Palm Springs, CA



CASA WASHINGTON DC FORUM

February 28-March 2, 2022
W Washington D.C.
Washington, D.C.



CASA 67TH ANNUAL CONFERENCE

August 10-12, 2022
Resort at Squaw Creek
Olympic Valley, CA

Common Acronyms

ATCM	Airborne Toxic Control Measure	NTR	National Toxics Rule
AWWA	American Water Works Association	OMB	Office of Management and Budget
BAC	Bioenergy Association of California	ONRW	Outstanding National Resource Water
BACWA	Bay Area Clean Water Agencies	OPC	Ocean Protection Council
BOD	Biochemical Oxygen Demand	PAG	Public Advisory Group
CAAQS	Calif Ambient Air Quality Standard	PCBs	PolyChlorinated Biphenyls
CalARP	Calif Accidental Release Prevention Program	PFAS	Per and polyfluoroalkyl substances
CAPIO	California Public Information Officials	POTWs	Publicly Owned Treatment Works
CARB	Calif Air Resources Board	PPIC	Public Policy Institute of California
CDFA	Calif Dept of Food & Agriculture	PSL	Private Sewer Lateral
CDO	Cease and Desist Order	QA/QC	Quality Assurance / Quality Control
CECs	Constituents of Emerging Concern	Region IX	Western Region of EPA (CA, AZ, NV & HI)
CEQA	Calif Environmental Quality Act	RFP	Request for Proposals
CFR	Code of Federal Regulations	RMP	Regional Monitoring Program
CMOM	Capacity, Management, Operation and Maintenance	RFQ	Request for Qualifications
CPUC	Calif Public Utilities Commission	RO	Reverse Osmosis
CSDA	Calif Special Districts Association	RP	Reasonable Potential
CSO	Combined Sewer Overflow	RWQCB	Regional Water Quality Control Board
CTR	California Toxics Rule	RWG	Regulatory Workgroup
CVCWA	Central Valley Clean Water Association	SCAP	Southern California Alliance of POTWs
CWA	Clean Water Act	SEP	Supplementary Environmental Projects
CWEA	Calif Water Environment Association	SLAPP	Strategic Lawsuit Against Public Participation
CWG	Collections Workgroup	SIP	State Implementation Policy (CTR/NTR criteria)
DO	Dissolved Oxygen	SRF	State Revolving Fund
DTSC	Dept of Toxic Substances Control	SS	Suspended Solids
EDW	Effluent Dominated Waterbody	SSO	Sanitary Sewer Overflow
EIS/EIR	Environmental Impact Statement/Report	SSMP	Sewer System Management Plan
ELAP	Environmental Lab Accreditation Program	SSS WDR	Sanitary Sewer System Waste Discharge Reqs.
EPA	Environmental Protection Agency	SWRCB	State Water Resources Control Board
FOG	Fats, Oils and Grease	TAC	Toxic Air Contaminant
GASB	Government Accounting Standards Board	TDS	Total Dissolved Solids
HAB	Harmful Algal Bloom	TMDL	Total Maximum Daily Load
HAP	Hazardous Air Pollutant	TSO	Time Schedule Order
IWC	Instream Waste Concentration	TSS	Total Suspended Solids
IWSFG	Int'l Water Services Flushability Group	UPCCAA	Uniform Public Construction Cost Accounting Act
JPA	Joint Powers Authority	UV	Ultraviolet Treatment
LA	Load Allocation (non-point sources)	VOCs	Volatile Organic Compounds
LAFCO	Local Agency Formation Commission	WAS	Waste Activated Sludge
LOCC	League of California Cities	WDR	Waste Discharge Requirements
LHC	Little Hoover Commission	WEF	Water Environment Federation
MACT	Maximum Achievable Control Technology	WRF	Water Research Foundation
MCL	Maximum Contaminant Level	WET	Whole Effluent Toxicity
MGD	Million Gallons per Day	WESTCAS	Western Coalition of Arid States
MMP	Mandatory Minimum Penalty	WIFIA	Water Infrastructure Finance and Innovation Act
MOU	Memorandum of Understanding	WLA	Waste Load Allocation
MUN	Municipal Drinking Water Use	WMI	Watershed Management Initiative
NACWA	National Association of Clean Water Agencies	WRCA	WaterReuse California
NAS	National Academy of Sciences	WRFP	Water Recycling Funding Program
NGOs	Non-Governmental Organizations	WRDA	Water Resource Development Act
NOP	Notice of Preparation	WWTP	Wastewater Treatment Plant
NOX	Nitrogen Oxides	WQBEL	Water Quality Based Effluent Limitation
NPDES	Nat'l Pollutant Discharge Elimination System	WQS	Water Quality Standards
NPS	Non-Point Source	WWWIFA	Water and Wastewater Infrastructure Financing Agency



2021 CASA BOARD OF DIRECTORS

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Jasmin Hall – VICE PRESIDENT
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Regional Wastewater Plant
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Clean Water

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Cheryl MacKelvie, Executive
Assistant, Meetings and
Membership

Greg Kester, Director of
Renewable Resource Programs

Jessica Gauger, Director of
Legislative Advocacy & Public
Affairs

Debbie Welch, Manager of
Association Services

Jared Voskuhl, Manager of
Regulatory Affairs

Alyssa Downs, Communications
Analyst

Alma Musvosvi, Legislative and
Regulatory Analyst

Roberta Larson, Special Advisor

Sarah Deslauriers, Climate
Change Program Manager

Michael F. Dillon, State Legislative
Advocate

Joyce Gwidt, Conference
Arrangements

Eric Sapirstein, Federal Legislative
Advocate

Sarah Sapirstein, Federal
Legislative and Policy Analyst

Thank you to the CASA Board, Staff, and Committee Chairs who make all of our accomplishments possible!

AGENDA ITEM #2

AGENDA ITEM: 2

MEETING DATE: Aug. 18, 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 (CVRA) for the November 2022 General Election, following the completion and receipt of the data from the 2020 Census. On July 6, 2020 the Board approved an agreement with Lapkoff and Gobalet for demographic services to assist in creating the new voting district maps pursuant to the CVRA. While the overall schedule of this effort has been delayed due to the COVID-19 pandemic, staff is confident that the proposed voting district maps can be approved in time for the November 2022 elections as originally planned.

There are a number of outreach activities that are to take place before the new voting district maps can be finalized. These activities include but are not limited to the following:

1. Conducting public outreach, including to non-English-speaking communities to explain the districting process and to encourage public participation.
2. Holding two public hearings to gather input before draft voting district maps are prepared.
3. Holding two additional public hearings after draft voting district maps have been prepared for additional public feedback.
4. Publicizing the above public hearings in advance (on website, social media, in press releases, posted in community).
5. Holding a public meeting on the proposed voting district maps for approval.
6. Submitting the approved final version of voting district maps to the County's Office of Elections.

The District Outreach Committee met on Friday, August 6, 2021 to discuss potential date changes to the schedule of outreach activities and to review possible outreach communication activities and their associated costs. Demographers Lapkoff and Gobalet recommended that the District schedule its public hearings after those of the City of Goleta (the City) and the Goleta Water District (GWD), to make the most of the exposure and outreach efforts of those

organizations, and after the census information has been released by the State. They also recommend using the regularly-planned Fall newsletter to disseminate information, in place of a flyer.

III. COMMENTS AND RECOMMENDATIONS

Staff has compiled an updated calendar of the planned outreach activities of the District, the City and GWD for review. The City has already held its first two public hearings. GWD has hearings planned for September 28 and October 16, 2021. The Outreach committee is proposing that the District hold the first required public hearing on November 1, 2021 at the regularly-scheduled Board meeting, and the second required public hearing on Saturday, November 13, 2021. The City plans to complete the map approval process by February 15, 2022, GWD plans to complete their process in Spring 2022. The District plans to complete the process by April, 2022. The Board may elect to adopt the recommended timeline, or change the dates of some of the activities, based on the activities and timelines of the other governments, pending discussion.

The District Outreach Committee considered various forms of outreach to the community including radio, print, and digital advertisements, press releases, and translation and interpretation services. The total costs for the proposed outreach activities as shown on the attached spreadsheet is approximately \$19,500. Staff recommends the Board authorize the expenditures of up to \$19,500 for the proposed outreach program activities.

IV. REFERENCE MATERIALS

Updated Outreach Plan for Transition to District-Based Elections

Updated Comparison Calendar of Local Governments' Outreach Plans

Projected Costs for Transition to District-based Elections Communications Outreach



**Proposed Updated Outreach Plan for
Transition to District-Based Elections**

Date	Activity Description
May 2021	Spring newsletter mailed out containing information regarding upcoming transition to district-based elections.
May 2021	District website is revised to include information on transition to district-based elections. This information is updated throughout the process as required.
Aug. 2021	Spanish translation of FAQs added to website about the district elections process. Post on FB.
Sept. 2021	Census data released. Website information is updated, posted on FB.
Oct. 2021	Newsletter sent with save-the-date message for hearings (third week of Oct.).
Oct. 2021	Press release , social media posts, website updated regarding first round of public hearings dates.
Nov. 1/13, 2021	First 2 (two) Public hearings held
Nov.-Jan. 2021	Preliminary voting district maps prepared by demographers based on census data, communities of interest, and public and Board comments.
Jan. 2022	Press release, social media posts, web updated regarding 2nd round of public hearings on draft voting district maps
Jan. 2022	Draft voting district map(s) published (website, Facebook, posted in community).
Feb. 2022	Flyer 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	Press release, social media posts, web updated regarding public hearing on adoption of proposed voting district map.
March 5, 2022	Proposed Second round of public hearings (#1 of 2) is held to gather input on proposed voting district maps.
March 21, 2022	Proposed Final public hearing (2 of 2) held to adopt proposed voting district maps and institute district-based elections. Final map is adopted
May 2022	Adopted voting district map files are sent to County of Santa Barbara for November election
Nov. 2022	General Election based on adopted voting districts for 2 GSD Board members candidates

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

◀ Jul 2021		August 2021					Sep 2021 ▶
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
1	2 City of Goleta 3 rd workshop/1 st public hearing	3	4	5	6	7	
8	9	10	11	12	13 Official population data released	14	
15	16	17 City of Goleta 2 nd Public hearing	18 GSD Special Board Meeting 2:00 p.m.	19	20	21	
22	23	24	25	26	27	28	
29	30	31					

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

September 2021						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6 Labor Day Holiday	7	8 GSD Special Board Meeting 6:30 p.m.	9	10	11
12	13	14	15	16	17	18
19	20 GSD Reg. Board Meeting	21	22	23 Adjusted census data released from State	24	25
26	27	28 Goleta Water 1 st Public hearing	29	30		

More Calendars: [Oct 2021](#), [Nov 2021](#), [2021](#)

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

◀ Sep 2021							October 2021							Nov 2021 ▶						
Sun			Mon			Tue			Wed			Thu			Fri			Sat		
															1			2		
3			4			5			6 GSD Special Board Meeting 2:00 p.m.			7			8			9		
10			11			12			13			14			15			16 Goleta Water 2 nd Public Hearing-GUSD board room		
17			18 GSD Reg. Board Meeting			19 Fall Newsletter w/Save the Date info for GSD first 2 Public Hearings sent			20			21 City of Goleta 4 th workshop held			22			23		
24			25 Proposed press releases re 1 st set of public hearings			26			27			28			29			30		
31																				

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

November 2021								
◀ Oct 2021	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Dec 2021 ▶
		1 GSD First Set Public Hearing, Mtg. #1 at Board Meeting	2	3	4	5	6	
7		8	9	10	11 Veteran's Day Holiday	12	13	
14		15 GSD Board Meeting	16	17	18	19	20 GSD First Set Public Hearing, Mtg. #2	
21		22 St	23	24	25 Thanksgiving Holiday	26	27	
28		29 GSD preliminary maps to be prepared Nov. 2021-Jan. 2022 Exact dates TBD	30					

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

December 2021						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1 GSD preliminary maps to be prepared Nov. 2021-Jan. 2022 Exact dates TBD	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25 Christmas
26	27	28	29	30	31	

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

January 2022						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6 Final date for draft maps for City of Goleta to be submitted	7	8
9	10	11 GSD Preliminary maps prepared-exact date TBD	12	13	14	15
16	17 MLK Jr. Holiday	18 GSD Draft map(s) published on website, social media, etc.	19	20	21	22
23	24 City of Goleta Draft Maps Posted	25 GSD Press release, social media posts, web updated re. 2nd round of public hearings on draft maps	26 City of Goleta Pub. Engagement Comm. To consider draft maps and provide recommendation to City Council	27	28	29
30	31					

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

February 2022						
◀ Jan 2022						Mar 2022 ▶
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1 City of Goleta 3 rd hearing of draft map(s)	2	3	4	5
6	7 GSD- Send flyer to residents re. 2 nd series of Public Hearings	8	9	10	11	12
13	14	15 City of Goleta 4 th Public hearing on maps and Council review and direction	16	17	18	19
20	21	22 Press release, social media posts, web updates, etc. for second round of public hearings	23	24	25	26
27	28					

More Calendars: [Mar 2022](#), [Apr 2022](#), [2022](#)

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

March 2022						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1 City of Goleta-final adoption by City Council of new map for by-district elections	2	3	4	5 GSD Public Hearing on maps-tentative
6	7	8 Goleta Water- 2 public hearings on draft maps, dates TBD	9	10	11	12
13	14	15	16	17	18	19
20	21 GSD Final public hearing to adopt proposed map.	22	23	24	25	26
27	28	29	30	31		

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	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

May 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				



GOLETA SANITARY
Water Resource Recovery District

**Proposed Outreach Budget for
Transition to District-Based Elections**

Item	Estimated Cost
Flyer to 12,000 households prior to 2nd round of public hearings	\$6,700
Radio Spots- 2 stations 4 weeks (30 sec. spot 3x/day) 2Xs - Rincon Broadcasting- Radio Bronco and K-LITE +3 spots free Tues.	\$5,960
Noozhawk Advertisement- 1 week 2Xs	\$950
SB Independent-2 4week 1/4 page ads	\$3,352
Translation and Interpretation Services	\$2,500
Press releases to Noozhawk, SB Independent,	0
Monarch Press, Goleta Gazette	0

Total \$19,462

GENERAL MANAGER'S REPORT

GOLETA SANITARY DISTRICT GENERAL MANAGER'S REPORT

The following summary report describes the District's activities from August 3, 2021 through August 18, 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 priority lines cleaning throughout the District. Staff continues cleaning efforts to remove grout-like material from sewer lines at Suellen Court near N. Fairview Avenue and at the San Marcos Preserve in an easement north of Foothill Road and Cocopah Drive.

CCTV INSPECTION

Staff continues conducting routine Closed-Circuit Television (CCTV) inspections in easement areas near Foothill and La Cumbre Roads.

GREASE AND OIL INSPECTIONS

Staff continues with the annual Grease and Oil inspections. To date, approximately 80 of the 100 food service establishments in the District have been inspected. The vast majority have passed the initial inspection. Staff is working with the District's Industrial Waste Control (IWC) Officer, Teresa Kistner on corrective action for those establishments which failed the initial inspection.

REPAIR AND MAINTENANCE

The TV unit generator has been repaired and the truck is back in operation. Staff repaired a leak in the Vac-Con debris tank. The Santa Barbara County paving project locations at San Simeon Drive and Queen Ann Lane is complete. No GSD manholes required lowering or raising.

2021 CCTVI PROJECT REVIEW

Staff awaits the finalization of the Hazen & Sawyer update of the District Asset Management Program. This update will provide the basis for the Collection System 10-year Capital Improvement Projects list.

FY 2020-21 HANDBILLED SEWER SERVICE CHARGES

Staff continues working on the annual hand billing sewer service charge invoices. The annual Sewer Service Charges were submitted to Santa Barbara County staff for inclusion with the upcoming FY 2021-22 property tax bills.

PROFESSIONAL DEVELOPMENT

Staff attended the Tri-State Seminar in Las Vegas, NV August 9, 2021 through August 12, 2021. The seminar included a variety of classes and training on Collections Systems, Lab, Maintenance, Operations and IWC topics.

2. TREATMENT, RECLAMATION AND DISPOSAL FACILITIES REPORT

Plant flows have maintained an average of 4.1 million gallons per day (MGD). The demand for reclaimed water is consistent at 1.5 MGD. Flow concentrations and loadings during the weekends continue to cause intermittent challenges and various levels of plant interference. Operations and Lab staff will conduct a test to determine the efficacy of the CounterQuat additive. This biostimulant is used to counteract the adverse impacts of Quaternary Ammonium Compounds (QACs) and surfactants found in common consumer antimicrobial products. The District has previously used the CounterQuat with positive results and has been able to help out other entities with our knowledge of the toxicity problem and some of the solutions. This test will give the District some quantifiable data.

Centrifuge operations are continuing as planned. Dredging operations have begun in lagoon #2.

The Lystek refeed project is in its last phase of biosolids recycling. We are testing a different form of alkalinity that is significantly less expensive and readily available. The next phase of testing with a different source of solids through the Lystek reactor will begin in the next few weeks.

3. GENERAL AND ADMINISTRATIVE ITEMS

Financial Report

The District account balances as of August 18, 2021 shown below are approximations to the nearest dollar and indicate the overall funds available to the District at this time.

Operating Checking Accounts:	\$ 354,161
Investment Accounts:	\$ 29,385,650
Total District Funds:	\$ 29,739,811

The following transactions are reported herein for the period 08/03/21 – 08/18/21.

Regular, Overtime, Cash-outs and Net Payroll:	\$ 118,379
Claims:	\$ 287,716
Total Expenditures:	\$ 406,095
Total Deposits:	\$ 42,898

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 – July, 2021

LAIF Quarterly Report – Previously submitted.

PMIA/LAIF Performance – July, 2021

PMIA Effective Yield – July, 2021

Community West Bank (CWB)

CWB Money Market Account – July, 2021

Deferred Compensation Accounts

CalPERS 457 Deferred Compensation Plan – July, 2021

Lincoln 457 Deferred Compensation Plan – July, 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.

Governing Board Meeting Schedule

Due to the upcoming conferences and Labor Day holiday, our next Board meeting will be a special meeting via zoom on Wednesday September 8, 2021 at 6:30pm

California State Treasurer
Fiona Ma, CPA



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

August 02, 2021

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

GOLETA SANITARY DISTRICT

GENERAL MANAGER
ONE WILLIAM MOFFETT PLACE
GOLETA, CA 93117

[Tran Type Definitions](#)

Account Number: 70-42-002

July 2021 Statement

Effective Date	Transaction Date	Tran Type	Confirm Number	Web Confirm Number	Authorized Caller	Amount
7/15/2021	7/14/2021	QRD	1679825	N/A	SYSTEM	1,651.08

Account Summary

Total Deposit:	1,651.08	Beginning Balance:	2,022,218.60
Total Withdrawal:	0.00	Ending Balance:	2,023,869.68



PMIA/LAIF Performance Report as of 08/05/21



PMIA Average Monthly Effective Yields⁽¹⁾

Jul	0.221
Jun	0.262
May	0.315

Quarterly Performance Quarter Ended 06/30/21

LAIF Apportionment Rate ⁽²⁾ :	0.33
LAIF Earnings Ratio ⁽²⁾ :	0.00000897371743018
LAIF Fair Value Factor ⁽¹⁾ :	1.00008297
PMIA Daily ⁽¹⁾ :	0.22%
PMIA Quarter to Date ⁽¹⁾ :	0.30%
PMIA Average Life ⁽¹⁾ :	291

Pooled Money Investment Account Monthly Portfolio Composition ⁽¹⁾ 06/30/21 \$193.3 billion

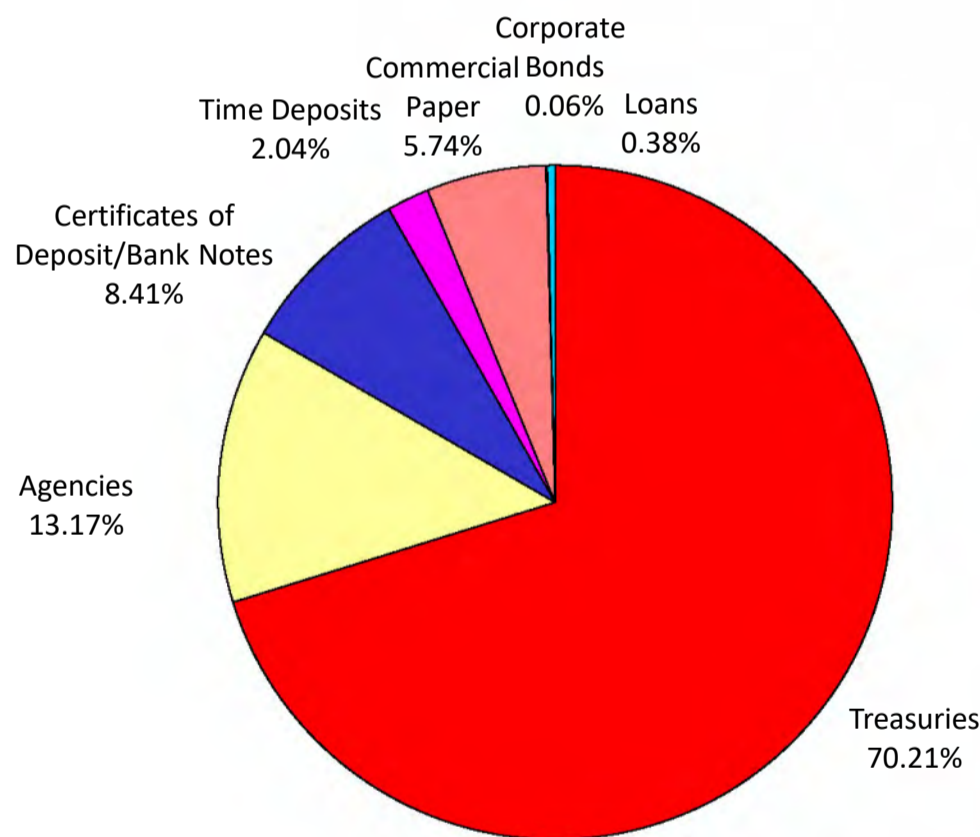


Chart does not include 0.01% of mortgages. Percentages may not total 100% due to rounding.

Daily rates are now available here. [View PMIA Daily Rates](#)

Notes: The apportionment rate includes interest earned on the CalPERS Supplemental Pension Payment pursuant to Government Code 20825 (c)(1) and interest earned on the Wildfire Fund loan pursuant to Public Utility Code 3288 (a).

Source:

⁽¹⁾ State of California, Office of the Treasurer

⁽²⁾ State of California, Office of the Controller



PMIA Average Monthly Effective Yields

08/05/21

POOLED MONEY INVESTMENT ACCOUNT

PMIA Average Monthly Effective Yields

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1991	8.164	8.002	7.775	7.666	7.374	7.169	7.098	7.072	6.859	6.719	6.591	6.318
1992	6.122	5.863	5.680	5.692	5.379	5.323	5.235	4.958	4.760	4.730	4.659	4.647
1993	4.678	4.649	4.624	4.605	4.427	4.554	4.438	4.472	4.430	4.380	4.365	4.384
1994	4.359	4.176	4.248	4.333	4.434	4.623	4.823	4.989	5.106	5.243	5.380	5.528
1995	5.612	5.779	5.934	5.960	6.008	5.997	5.972	5.910	5.832	5.784	5.805	5.748
1996	5.698	5.643	5.557	5.538	5.502	5.548	5.587	5.566	5.601	5.601	5.599	5.574
1997	5.583	5.575	5.580	5.612	5.634	5.667	5.679	5.690	5.707	5.705	5.715	5.744
1998	5.742	5.720	5.680	5.672	5.673	5.671	5.652	5.652	5.639	5.557	5.492	5.374
1999	5.265	5.210	5.136	5.119	5.086	5.095	5.178	5.225	5.274	5.391	5.484	5.639
2000	5.760	5.824	5.851	6.014	6.190	6.349	6.443	6.505	6.502	6.517	6.538	6.535
2001	6.372	6.169	5.976	5.760	5.328	4.958	4.635	4.502	4.288	3.785	3.526	3.261
2002	3.068	2.967	2.861	2.845	2.740	2.687	2.714	2.594	2.604	2.487	2.301	2.201
2003	2.103	1.945	1.904	1.858	1.769	1.697	1.653	1.632	1.635	1.596	1.572	1.545
2004	1.528	1.440	1.474	1.445	1.426	1.469	1.604	1.672	1.771	1.890	2.003	2.134
2005	2.264	2.368	2.542	2.724	2.856	2.967	3.083	3.179	3.324	3.458	3.636	3.808
2006	3.955	4.043	4.142	4.305	4.563	4.700	4.849	4.946	5.023	5.098	5.125	5.129
2007	5.156	5.181	5.214	5.222	5.248	5.250	5.255	5.253	5.231	5.137	4.962	4.801
2008	4.620	4.161	3.777	3.400	3.072	2.894	2.787	2.779	2.774	2.709	2.568	2.353
2009	2.046	1.869	1.822	1.607	1.530	1.377	1.035	0.925	0.750	0.646	0.611	0.569
2010	0.558	0.577	0.547	0.588	0.560	0.528	0.531	0.513	0.500	0.480	0.454	0.462
2011	0.538	0.512	0.500	0.588	0.413	0.448	0.381	0.408	0.378	0.385	0.401	0.382
2012	0.385	0.389	0.383	0.367	0.363	0.358	0.363	0.377	0.348	0.340	0.324	0.326
2013	0.300	0.286	0.285	0.264	0.245	0.244	0.267	0.271	0.257	0.266	0.263	0.264
2014	0.244	0.236	0.236	0.233	0.228	0.228	0.244	0.260	0.246	0.261	0.261	0.267
2015	0.262	0.266	0.278	0.283	0.290	0.299	0.320	0.330	0.337	0.357	0.374	0.400
2016	0.446	0.467	0.506	0.525	0.552	0.576	0.588	0.614	0.634	0.654	0.678	0.719
2017	0.751	0.777	0.821	0.884	0.925	0.978	1.051	1.084	1.111	1.143	1.172	1.239
2018	1.350	1.412	1.524	1.661	1.755	1.854	1.944	1.998	2.063	2.144	2.208	2.291
2019	2.355	2.392	2.436	2.445	2.449	2.428	2.379	2.341	2.280	2.190	2.103	2.043
2020	1.967	1.912	1.787	1.648	1.363	1.217	0.920	0.784	0.685	0.620	0.576	0.540
2021	0.458	0.407	0.357	0.339	0.315	0.262	0.221					



445 Pine Avenue
Goleta, CA 93117

Statement Ending 07/30/2021

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	\$27,368,727.56

PUBLIC AGENCY-MMDA - XXXXXXXX5554

Account Summary

Date	Description	Amount		
07/01/2021	Beginning Balance	\$28,661,780.27	Average Ledger Balance	\$28,175,113.60
	1 Credit(s) This Period	\$6,947.29		
	2 Debit(s) This Period	\$1,300,000.00		
07/30/2021	Ending Balance	\$27,368,727.56		

Account Activity

Post Date	Description	Debits	Credits	Balance
07/01/2021	Beginning Balance			\$28,661,780.27
07/14/2021	X-fer to Ops. PERS UAL due	\$800,000.00		\$27,861,780.27
07/29/2021	Claims funding	\$500,000.00		\$27,361,780.27
07/30/2021	INTEREST AT .3000 %		\$6,947.29	\$27,368,727.56
07/30/2021	Ending Balance			\$27,368,727.56



CalPERS 457 Plan

July 31, 2021

This document includes important information to help you compare the investment options under your retirement plan. If you want additional information about your investment options, you can go to <https://calpers.voya.com>.

A free paper copy of the information available on the website can be obtained by contacting:

Voya Financial
Attn: CalPERS 457 Plan
P.O. Box 55772
Boston, MA 02205-5772
(800) 260-0659

Document Summary

This document has two parts. Part I consists of performance information for the plan investment options. This part shows you how well the investments have performed in the past. Part I also shows the total annual operating expenses of each investment option.

Part II provides additional information concerning Plan administrative fees that may be charged to your individual account.

CalPERS 457 PLAN

Part I. Performance Information For Periods Ended July 31, 2021

<https://calpers.voya.com>

Table 1 focuses on the performance of investment options that do not have a fixed or stated rate of return. Table 1 shows how these options have performed over time and allows you to compare them with an appropriate benchmark for the same time periods¹. Past performance does not guarantee how the investment option will perform in the future. Your investment in these options could lose money. Information about an investment option's principal risks is available on the website listed above.

Table 1 also shows the Total Annual Operating Expenses of each investment option. Total Annual Operating Expenses are expenses that reduce the rate of return of the investment option². The cumulative effect of fees and expenses can substantially reduce the growth of your retirement savings. Visit the U.S. Department of Labor's website for an example showing the long-term fees and expenses at <http://www.dol.gov/ebsa>. Fees and expenses are only one of many factors to consider when you decide to invest in an option. You may also want to think about whether an investment in a particular option, along with your other investments, will help you achieve your financial goals.

Table 1 - Variable Net Return Investments								
Name of Fund / Name of Benchmark	Performance		Annualized Performance				Total Annual Operating Expenses ³	
	3 Month	1 Year	5 Years	10 Years	Since Inception	Inception Date	As a %	Per \$1000
Equity Funds								
State Street Russell All Cap Index Fund - Class I	4.60	38.38	16.94	-	14.55	10/07/13	0.31%	\$3.10
<i>Russell 3000 Index</i>	4.67	38.73	17.36	-	14.94			
State Street Global All Cap Equity ex-US Index Fund - Class I	0.99	29.35	9.66	-	5.92	10/07/13	0.32%	\$3.20
<i>MSCI ACWI ex-USA IMI Index (net)</i>	1.03	29.53	9.82	-	6.13			
Fixed Income								
State Street US ShortTerm Gov't/Credit Bond Index Fund - Class I	0.05	0.08	1.47	-	1.16	10/07/13	0.32%	\$3.20
<i>Bloomberg Barclays US 1-3 yr Gov't/Credit Bond Index</i>	0.14	0.43	1.91	-	1.64			
State Street US Bond Fund Index - Class I	2.10	-1.02	2.79	-	3.27	10/07/13	0.31%	\$3.10
<i>Bloomberg Barclays US Aggregate Bond Index</i>	2.16	-0.70	3.13	-	3.58			
Real Assets								
State Street Real Asset Fund - Class A	3.58	27.31	6.02	-	3.31	10/08/13	0.44%	\$4.40
<i>State Street Custom Benchmark⁴</i>	3.68	27.85	6.34	-	3.68			
Cash (Cash Equivalents)								
State Street STIF	-0.05	-0.16	0.97	-	0.67	09/02/14	0.33%	\$3.30
<i>BofA ML 3-month US T-Bill</i>	0.00	0.08	1.17	-	0.88			
Target Retirement Date Funds⁵								
CalPERS Target Income Fund	2.36	10.32	5.93	4.84	5.99	12/01/08	0.32%	\$3.20
<i>SIP Income Policy Benchmark⁶</i>	2.42	10.63	6.14	5.15	6.51			
CalPERS Target Retirement 2015	2.38	11.09	5.99	5.23	7.07	12/01/08	0.32%	\$3.20
<i>SIP 2015 Policy Benchmark⁶</i>	2.44	11.41	6.20	5.63	7.61			
CalPERS Target Retirement 2020	2.52	15.32	6.93	5.90	7.83	12/01/08	0.32%	\$3.20
<i>SIP 2020 Policy Benchmark⁶</i>	2.58	15.63	7.14	6.30	8.35			
CalPERS Target Retirement 2025	2.63	19.59	8.33	6.79	8.76	12/01/08	0.32%	\$3.20
<i>SIP 2025 Policy Benchmark⁶</i>	2.69	19.89	8.53	7.21	9.25			
CalPERS Target Retirement 2030	2.77	23.99	9.34	7.54	9.65	12/01/08	0.32%	\$3.20
<i>SIP 2030 Policy Benchmark⁶</i>	2.83	24.29	9.62	8.01	10.15			
CalPERS Target Retirement 2035	2.92	28.59	10.51	8.27	10.43	12/01/08	0.32%	\$3.20
<i>SIP 2035 Policy Benchmark⁶</i>	2.98	28.87	10.77	8.76	10.99			
CalPERS Target Retirement 2040	3.00	32.25	11.60	8.92	11.00	12/01/08	0.32%	\$3.20
<i>SIP 2040 Policy Benchmark⁶</i>	3.06	32.53	11.88	9.42	11.53			
CalPERS Target Retirement 2045	3.00	32.25	12.16	9.21	11.19	12/01/08	0.32%	\$3.20
<i>SIP 2045 Policy Benchmark⁶</i>	3.06	32.53	12.44	9.71	11.76			
CalPERS Target Retirement 2050	3.00	32.25	12.16	9.20	11.27	12/01/08	0.32%	\$3.20
<i>SIP 2050 Policy Benchmark⁶</i>	3.06	32.53	12.44	9.71	11.76			
CalPERS Target Retirement 2055	3.00	32.26	12.16	-	9.09	10/07/13	0.32%	\$3.20
<i>SIP 2055 Policy Benchmark⁶</i>	3.06	32.53	12.44	-	9.44			
CalPERS Target Retirement 2060	3.00	32.25	-	-	16.90	11/01/18	0.32%	\$3.20
<i>SIP 2060 Policy Benchmark⁶</i>	3.06	32.53	-	-	17.19			
Broad-Based Benchmarks⁷								
<i>Russell 3000 Index</i>	4.67	38.73	17.36	15.16	-	-	-	-
<i>MSCI ACWI ex-USA IMI Index (net)</i>	1.03	29.53	9.82	5.64	-	-	-	-
<i>Bloomberg Barclays US Aggregate Bond Index</i>	2.16	-0.70	3.13	3.35	-	-	-	-

Part II. Explanation of CalPERS 457 Plan Expenses July 31, 2021

<https://calpers.voya.com>

Table 2 provides information concerning Plan administrative fees and expenses that may be charged to your individual account if you take advantage of certain features of the Plan. In addition to the fees and expenses described in Table 2 below, some of the Plan's administrative expenses are paid from the Total Annual Operating Expenses of the Plan's investment options.

Table 2 - Fees and Expenses				
Individual Expenses ⁸				
Service	Fee Amount	Frequency	Who do you pay this fee to?	Description
Loan Origination Fee	\$50	Per loan application	Voya	The charge covers the processing of your loan and applies each time you request a loan from your retirement account. This fee is deducted from your Plan account.
Maintenance Fee (For loans taken on or after April 1, 2020)	\$35 (\$8.75 assessed quarterly)	Annual	Voya	The charge covers the maintenance costs of your loan and applies on a quarterly basis. This fee is deducted from your Plan account.
Self-Managed Account (SMA) Maintenance Fee	\$50	Annual fee deducted monthly on a pro-rata basis	Voya	Schwab Personal Choice Retirement Account is available to you if your Employer has elected it as an option. This fee is deducted pro rata on a monthly basis from your core fund investments ⁹ in your CalPERS 457 account. For more information about SMAs, including a complete list of fees charged by Schwab for different types of investment transactions, please contact Schwab at (888) 393-PCRA (7272). Fees may also be incurred as a result of actual brokerage account trades. Before purchasing or selling any investment through the SMA, you should contact Schwab at (888) 393-PCRA (7272) to inquire about any fees, including any undisclosed fees, associated with the purchase or sale of such investment.
Self-Managed Account (SMA) Plan Administrative Fee	0.29% (\$2.90 per \$1,000)	Annual fee deducted monthly on a pro-rata basis	Voya	The SMA Plan Administrative fee pays for recordkeeping costs for assets in your SMA account. This fee is deducted pro rata on a monthly basis from your core fund investments in your CalPERS 457 account. The SMA Plan Administrative Fee is subject to change based on total Plan assets.

Footnotes for Table 1 and Table 2:

- ¹ Fund returns shown are net of investment management and administrative expenses and fees unless otherwise noted. Benchmark performance returns do not reflect any management fees, transaction costs or expenses. Benchmarks are unmanaged. You cannot invest directly in a benchmark.
- ² Historical annual operating expenses are not available. Reported annual operating expenses are estimated based on SSGA investment management, Voya recordkeeping, and SSGA capped operating expenses.
- ³ Total annual operating expenses are comprised of investment management and administrative expenses and fees incurred by the funds.
- ⁴ State Street Real Asset Fund has a custom benchmark comprised of 25% Bloomberg Roll Select Commodity Index, 25% S&P® Global Large MidCap Commodity and Resources Index, 10% Dow Jones U.S. Select REIT Index, 20% Bloomberg Barclays U.S. Government Inflation-Linked 1-10 Year Bond Index, and 20% S&P Global Infrastructure Index.
- ⁵ If the ending market value (EMV) falls to zero in any one month, the inception date resets to the next month with an EMV. Performance is then calculated from the new inception date.
- ⁶ The benchmark for each Target Retirement Date Fund is a composite of asset class benchmarks that are weighted according to each Fund's policy target weights. The asset class benchmarks are Russell 3000 Index, MSCI ACWI ex-USA IMI Index (net), Bloomberg Barclays US Aggregate Bond Index, the SSGA customized benchmark for Real Assets (see footnote 4), and BofA ML 3-month US T-Bill.
- ⁷ Broad-based benchmarks grouped here provide comparative performance standards for domestic equity, international equity and fixed income.
- ⁸ The CalPERS Board of Administration periodically reviews the plan administrative fees and adjusts fees to reflect expenses incurred by the Plan. Participant fees are charged to reimburse CalPERS for actual administrative fees of the Plan.
- ⁹ Core fund investments are listed in Table 1 above the Target Retirement Date funds. Core funds include: State Street Russell All Cap Index Fund (Class I), State Street Global All Cap Equity ex-US Index Fund (Class I), State Street US Short Term Government/Credit Bond Index Fund (Class I), State Street US Bond Fund Index (Class I), State Street Real Asset Fund (Class A), and State Street Short Term Investment Fund ("STIF").

Performance Update

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 08/04/2021	YTD as of 07/30/2021	Average Annual Total Return (%) as of 7/30/2021						Since Incep.	
					1 Mo	3 Mo	1 Yr	3 Yr	5 Yr	10 Yr		
Risk Managed												
Fidelity® VIP Freedom 2055 Portfolio SM - Service Class ^{6,9}	RM	04/11/2019	0.00	13.13	12.28	0.41	3.23	31.44	N/A	N/A	N/A	18.17
Fidelity® VIP Freedom 2060 Portfolio SM - Service Class ^{6,9}	RM	04/11/2019	-0.07	13.01	12.24	0.41	3.22	31.49	N/A	N/A	N/A	18.21
Maximum Capital Appreciation												
AB VPS Global Thematic Growth Portfolio - Class B ^{1,2}	MCA	01/11/1996	0.23	14.10	12.62	2.55	4.82	35.08	20.30	18.52	10.21	6.40
DWS Alternative Asset Allocation VIP Portfolio - Class A ^{1,2,3,6,7}	MCA	02/02/2009	-0.21	9.41	9.57	0.87	3.02	20.56	6.96	4.07	2.32	4.81
LVIP Baron Growth Opportunities Fund - Service Class ⁴	MCA	10/01/1998	-0.27	10.53	10.60	1.91	2.76	39.15	18.68	18.72	14.30	11.89
LVIP Delaware SMID Cap Core Fund - Standard Class ^{4,5}	MCA	07/12/1991	-0.88	14.42	15.50	-0.29	-1.35	43.50	10.00	11.36	10.83	9.47
LVIP SSGA Emerging Markets 100 Fund - Standard Class ^{1,19}	MCA	06/18/2008	0.00	10.19	8.12	-3.94	-3.29	32.28	2.52	5.18	-0.32	2.69
LVIP SSGA Small-Cap Index Fund - Standard Class ^{4,18}	MCA	04/18/1986	-1.23	11.04	12.56	-3.69	-1.80	50.16	9.94	12.67	10.76	7.41
LVIP T. Rowe Price Structured Mid-Cap Growth Fund - Standard Class ⁴	MCA	02/03/1994	0.37	12.24	11.29	2.19	5.94	34.57	20.67	18.51	14.68	7.77
Long Term Growth												
American Funds Global Growth Fund - Class 2 ¹	LTG	04/30/1997	0.22	14.05	12.68	1.47	3.26	32.95	18.60	17.49	12.87	9.93
American Funds Growth Fund - Class 2	LTG	02/08/1984	0.13	13.88	13.13	0.72	3.76	42.47	25.08	23.35	16.59	12.57

Performance Update

Monthly hypothetical performance adjusted for contract fees *

Investment Options		Inception Date	Change from Previous Day	YTD as of 08/04/2021	YTD as of 07/30/2021	Average Annual Total Return (%) as of 7/30/2021						Since Incep.
						1 Mo	3 Mo	1 Yr	3 Yr	5 Yr	10 Yr	
American Funds International Fund - Class 2 ¹	LTG	05/01/1990	-0.04	1.83	0.67	-3.29	-1.02	24.39	5.84	9.02	5.51	6.93
Delaware VIP Small Cap Value ^{4, 5}	LTG	12/27/1993	-1.62	19.83	21.38	-1.66	-2.68	56.05	6.00	9.66	9.28	9.34
Fidelity® VIP Contrafund® Portfolio - Service Class	LTG	01/03/1995	0.16	17.55	16.58	2.95	7.15	29.94	19.82	17.53	13.66	11.08
Fidelity® VIP Growth Portfolio - Service Class	LTG	10/09/1986	0.22	15.90	14.85	1.66	5.46	34.90	24.01	23.07	16.73	10.46
LVIP BlackRock Global Real Estate Fund - Standard Class ^{1, 2, 9}	LTG	04/30/2007	-0.20	21.15	21.19	3.35	6.32	36.52	10.33	5.32	5.68	2.07
LVIP Delaware Mid Cap Value Fund - Standard Class ^{4, 5}	LTG	12/28/1981	-1.15	18.67	19.44	0.22	-0.33	50.48	7.91	10.64	10.11	10.46
LVIP Delaware Social Awareness Fund - Standard Class ⁵	LTG	05/02/1988	-0.52	16.67	16.87	2.62	4.32	37.07	17.41	15.67	13.31	10.31
LVIP Dimensional U.S. Core Equity 1 Fund - Standard Class	LTG	12/28/1981	-0.77	17.63	17.87	1.17	3.29	40.65	15.01	15.26	13.13	10.04
LVIP Mondrian International Value Fund - Standard Class ¹	LTG	05/01/1991	-0.59	11.03	10.34	-1.03	2.13	29.18	2.59	5.07	3.60	5.39
LVIP SSGA International Index Fund - Standard Class ^{1, 18, 20}	LTG	04/30/2008	-0.18	10.32	9.09	0.79	2.82	28.98	6.44	8.05	4.80	2.08
LVIP SSGA S&P 500 Index Fund - Standard Class ^{18, 21}	LTG	05/01/2000	-0.47	17.32	17.15	2.26	5.16	34.80	16.67	15.90	13.91	6.05
LVIP Vanguard Domestic Equity ETF Fund - Service Class ^{6, 22}	LTG	04/29/2011	-0.48	16.32	16.26	1.83	4.64	36.13	16.35	15.29	12.97	11.98
LVIP Vanguard International Equity ETF Fund - Service Class ^{1, 6, 22}	LTG	04/29/2011	-0.19	8.85	7.77	-1.03	1.20	28.70	6.86	8.50	4.61	3.96
MFS® VIT Utilities Series - Initial Class ²	LTG	01/03/1995	-0.32	5.63	4.54	1.98	-0.25	15.27	9.23	8.06	7.69	10.09
Growth and Income												
American Funds Growth-Income Fund - Class 2	GI	02/08/1984	-0.45	15.47	15.51	1.70	3.96	30.84	13.27	14.69	13.08	10.36
BlackRock Global Allocation V.I. Fund - Class I ^{1, 3}	GI	02/28/1992	-0.20	6.03	5.94	-0.14	1.05	20.72	10.87	9.04	6.06	6.62
Fidelity® VIP Freedom 2020 Portfolio SM - Service Class ^{6, 8}	GI	04/26/2005	0.00	7.12	6.58	0.57	2.62	17.13	10.03	9.22	7.29	6.27
Fidelity® VIP Freedom 2025 Portfolio SM - Service Class ^{6, 8}	GI	04/26/2005	0.00	8.08	7.49	0.60	2.76	19.46	10.82	10.02	8.11	6.83

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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 7/30/2021									
				YTD as of 08/04/2021	YTD as of 07/30/2021	1 Mo	3 Mo	1 Yr	3 Yr	5 Yr	10 Yr	Since Incep.	
Fidelity® VIP Freedom 2030 Portfolio SM - Service Class ^{6, 8}	GI	04/26/2005	0.00	9.24	8.59	0.60	2.93	22.28	11.62	11.31	8.83	7.14	
Fidelity® VIP Freedom 2035 Portfolio SM - Service Class ^{6, 8}	GI	04/08/2009	-0.04	11.49	10.76	0.49	3.09	27.79	12.88	12.73	9.76	12.38	
Fidelity® VIP Freedom 2040 Portfolio SM - Service Class ^{6, 8}	GI	04/08/2009	-0.04	13.09	12.32	0.45	3.23	31.45	13.76	13.32	10.09	12.74	
Fidelity® VIP Freedom 2045 Portfolio SM - Service Class ^{6, 8}	GI	04/08/2009	-0.04	13.10	12.34	0.48	3.24	31.45	13.76	13.31	10.15	12.82	
Fidelity® VIP Freedom 2050 Portfolio SM - Service Class ^{6, 8}	GI	04/08/2009	-0.04	13.10	12.33	0.46	3.23	31.42	13.74	13.31	10.16	12.93	
LVIP BlackRock Advantage Allocation Fund - Standard Class ^{3, 5, 10}	GI	07/28/1988	-0.11	6.08	5.67	0.86	2.50	14.19	8.62	7.51	6.11	5.92	
LVIP Delaware REIT Fund - Standard Class ^{2, 5, 9}	GI	05/04/1998	-0.70	25.29	26.57	5.04	8.40	34.50	9.15	3.63	7.48	7.93	
LVIP Delaware Value Fund - Standard Class ⁵	GI	07/28/1988	-1.21	11.91	13.00	1.04	1.13	29.96	7.16	8.11	11.12	8.00	
LVIP Delaware Wealth Builder Fund - Standard Class ^{3, 5, 10}	GI	08/03/1987	-0.39	7.51	7.55	0.95	2.52	15.96	6.87	6.11	5.88	6.11	
LVIP JPMorgan Retirement Income Fund - Standard Class ^{3, 5, 10}	GI	04/27/1983	-0.16	3.95	3.78	0.56	1.79	11.22	6.51	5.40	4.79	6.64	
Income													
LVIP BlackRock Inflation Protected Bond Fund - Standard Class ¹²	I	04/30/2010	-0.06	2.90	2.92	1.63	2.31	4.56	3.79	2.37	1.14	1.85	
LVIP Delaware Bond Fund - Standard Class ^{5, 12}	I	12/28/1981	-0.02	-0.78	-0.99	0.93	1.56	-0.31	5.28	2.72	2.68	6.59	
LVIP Delaware Diversified Floating Rate Fund ^{5, 14}	I	04/30/2010	0.01	-0.39	-0.37	-0.05	-0.21	0.24	0.60	0.75	0.21	0.28	
LVIP Delaware Diversified Income Fund - Standard Class ^{5, 12}	I	05/16/2003	-0.01	-0.54	-0.73	0.85	1.64	1.04	5.91	3.19	2.79	4.43	
LVIP Delaware High Yield Fund - Standard Class ^{5, 12, 15}	I	07/28/1988	-0.12	2.70	2.99	0.18	1.27	8.52	6.37	5.53	4.64	5.70	
LVIP Global Income Fund - Standard Class ^{1, 10, 12, 13}	I	05/04/2009	-0.06	-2.43	-2.61	0.71	0.64	-1.52	3.10	2.08	0.71	2.55	
LVIP SSGA Bond Index Fund - Standard Class ^{12, 18}	I	04/30/2008	0.01	-1.00	-1.25	1.00	1.79	-1.97	4.41	1.78	1.99	2.59	
PIMCO VIT Total Return Portfolio - Administrative Class ¹²	I	12/31/1997	0.00	-0.62	-0.80	0.90	1.84	-0.28	4.80	2.61	2.47	4.28	

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Performance Update

Monthly hypothetical performance adjusted for contract fees *

Investment Options	Inception Date	Change from Previous Day	YTD as of 08/04/2021	YTD as of 07/30/2021	Average Annual Total Return (%) as of 7/30/2021						Since Incep.	
					1 Mo	3 Mo	1 Yr	3 Yr	5 Yr	10 Yr		
Risk Managed - Asset Allocation												
LVIP Global Conservative Allocation Managed Risk Fund - Standard Class ^{1,3,6,10,16}	RMAA	05/03/2005	-0.19	5.74	5.56	0.79	2.29	12.91	6.33	5.68	4.93	5.08
LVIP Global Growth Allocation Managed Risk Fund - Standard Class ^{1,3,6,10,16}	RMAA	05/03/2005	-0.30	9.35	9.08	0.49	2.45	19.18	6.41	7.06	5.01	4.85
LVIP Global Moderate Allocation Managed Risk Fund - Standard Class ^{1,3,6,10,16}	RMAA	05/03/2005	-0.26	7.90	7.64	0.54	2.38	16.20	6.21	6.56	4.87	5.00
LVIP SSGA Global Tactical Allocation Managed Volatility Fund - Standard Class ^{1,3,6,10,11,13}	RMAA	05/03/2005	-0.55	9.55	9.41	0.28	2.36	23.28	6.56	6.79	4.60	4.08
Preservation of Capital												
LVIP Government Money Market Fund - Standard Class ^{10,17}	PC	01/07/1982	0.00	-0.59	-0.57	-0.08	-0.25	-0.98	-0.08	-0.23	-0.60	2.71
Risk Managed - US Large Cap												
LVIP BlackRock Dividend Value Managed Volatility Fund - Standard Class ^{10,11}	RMUSL	02/03/1994	-1.10	16.00	16.71	-0.49	-0.59	36.31	7.31	8.86	6.91	6.77
LVIP Blended Large Cap Growth Managed Volatility Fund - Standard Class ^{10,11,13}	RMUSL	02/03/1994	0.05	20.40	19.79	3.78	8.37	35.61	16.75	15.44	10.67	7.51
Asset Allocation												
LVIP T. Rowe Price 2010 Fund (Standard Class) ^{6,8,10}	AsA	05/01/2007	-0.16	6.45	6.25	0.79	2.29	15.22	8.66	6.75	4.98	4.34
LVIP T. Rowe Price 2020 Fund (Standard Class) ^{6,8,10}	AsA	05/01/2007	-0.19	7.68	7.44	0.76	2.38	18.64	9.58	8.04	5.54	4.45
LVIP T. Rowe Price 2030 Fund (Standard Class) ^{6,8,10}	AsA	05/01/2007	-0.24	10.08	9.79	0.72	2.66	24.65	11.15	9.27	6.12	4.73
LVIP T. Rowe Price 2040 Fund (Standard Class) ^{6,8,10}	AsA	05/01/2007	-0.30	12.35	12.04	0.67	2.81	29.97	12.44	10.44	6.60	4.70
LVIP T. Rowe Price 2050 Fund (Standard Class) ^{6,8,10}	AsA	04/29/2011	-0.31	13.06	12.74	0.63	2.84	31.76	12.83	11.40	7.01	6.32
LVIP T. Rowe Price 2060 Fund - Standard Class ^{6,8,10}	AsA	04/30/2020	-0.33	13.70	13.38	0.64	2.81	33.93	N/A	N/A	N/A	39.06
Risk Managed - US Mid Cap												

Performance Update

Monthly hypothetical performance adjusted for contract fees *

Investment Options	Inception Date	Change from Previous Day	Average Annual Total Return (%) as of 7/30/2021									
			YTD as of 08/04/2021	YTD as of 07/30/2021	1 Mo	3 Mo	1 Yr	3 Yr	5 Yr	10 Yr	Since Incep.	
LVIP Blended Mid Cap Managed Volatility Fund - Standard Class ^{4, 10, 11, 13}	RMUSM 05/01/2001	0.20	10.04	9.32	2.96	5.71	29.98	16.41	16.01	7.78	5.26	
LVIP JPMorgan Select Mid Cap Value Managed Volatility Fund - Standard Class ^{4, 10, 11, 13}	RMUSM 05/01/2001	-1.12	20.11	20.80	0.59	0.46	44.37	6.71	7.71	6.84	6.33	
Risk Managed - Global/International												
LVIP Franklin Templeton Global Equity Managed Volatility Fund - Standard Class ^{1, 10, 11}	RMGI 08/01/1985	-0.64	13.46	13.43	1.69	3.62	32.55	7.89	9.69	5.94	7.27	
LVIP SSGA International Managed Volatility Fund - Standard Class ^{1, 6, 10, 11}	RMGI 12/31/2013	-0.17	10.08	8.86	0.68	2.60	28.60	3.35	5.86	N/A	1.65	

* 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.

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

¹⁶ 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.

¹⁷ 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.

¹⁸ Index

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

¹⁹ 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.

²⁰ 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.

²¹ 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®.

²² 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 August 18, 2021



Date: **Correspondence Sent To:**

1. 08/05/2021 Nicholas Bruce
University of California, Santa Barbara
Subject: Permit
Proposed 18,000 SF Tenant Improvement for proposed Café, offices,
conference rooms and new restrooms in an existing 70,000 SF office
building
A.P.N. 071-140-075 at 5385 Hollister Ave., Goleta CA

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