

PAUMA VALLEY COMMUNITY SERVICES DISTRICT

33129 Cole Grade Road
Pauma Valley, CA 92061
PHONE: (760) 742-1909 | FAX: (760) 742-1588

**REGULAR MEETING
SUPPLEMENTAL MATERIALS PACKET**

DATE: Monday, September 28th, 2026
TIME: 10:00 AM – **Open Session**
VENUE: Board Room, Pauma Valley Community Services District
33129 Cole Grade Road, Pauma Valley, CA 92061

Pauma Valley Community Services District Mission

“The mission of the Pauma Valley Community Services District is to protect the public health and environment of its community by providing effective wastewater management and stormwater drainage control, life safety assistance, security services, and exceptional customer care.”

PAUMA VALLEY COMMUNITY SERVICES DISTRICT
Minutes of a Regular Meeting of the Board of Directors

Held on July 27th, 2026

Directors Present: Fred Nelson, Richard Collins, Lolo Levy, and Zan Villanueva
Directors Absent: Michael Esparza
Staff Present: General Manager Eric Steinlicht, Office Manager Marissa Fehling, and Administrative Assistant Maritza Chaloux
Also Present: James Fischer with Fischer Compliance, via Zoom

1. Call to Order: The Regular Meeting was called to order at 10:00 a.m. by Director Nelson
2. Pledge of Allegiance: The Pledge of Allegiance was led by General Manager Steinlicht.
3. Roll Call: Administrative Assistant Maritza Chaloux conducted roll call and confirmed that a quorum was present.
4. Approval of the Agenda: The agenda was reviewed. No changes to the agenda were requested by the Board.
5. Public Comment Period:
There were no public comments.

– CONSENT ITEMS –

Items 6-12 appearing on the Consent Calendar may be voted on by a single motion. Items shall be removed from the Consent Calendar if any member of the Board of Directors or public requests removal prior to a vote on a motion to approve the items. Such items removed will be considered separately for action by the Board.

6. Minutes of the Regular Board Meeting on June 22nd, 2026
7. Review of Variance Report, Balance Sheet, Revenue and Expense Report
8. Accounts Receivable Report
9. Security Division Report
10. Resolution Number One Hundred and Forty Authorizing the Placement of Delinquent Accounts onto the San Diego Tax Roll
11. Resolution Number One Hundred and Forty-One Approving and Adopting the Fiscal Year 2027 Operating Budget
12. Master Lease and Addendum between the District and the Rancho Pauma Mutual Water Company

Motion: Approve and file Consent Calendar Items 6-12

Result: Approved

Moved by: Director Collins

Seconded by: Director Nelson

– DISCUSSION ITEMS –

13. Security Division Ad-Hoc Committee Update and the Pauma Valley Roadway Association

The Board received an update from the Security Division Ad-Hoc Committee regarding coordination with the Pauma Valley Roadway Association (PVRA). Discussion focused on improving communication, documenting service requests, and clarifying whether certain security-related services should be provided as a courtesy or billed to PVRA, including the proposed \$50 vehicle escort fee. The Board also discussed the District's current practice of deactivating RFID access for individuals identified by PVRA as delinquent and directed staff to confirm whether PVRA wished to continue this practice. No formal policy was adopted.

14. Community Safety and Wellness Fair Ad-Hoc Committee Update

The Board received an update from the Community Safety and Wellness Fair Ad-Hoc Committee regarding the event scheduled for November 7, 2026. Discussion included event logistics, coordination with participating agencies and vendors, and plans to invite representatives from local fire and law enforcement agencies, SDG&E, AirMed Care, and organizations specializing in wildfire and earthquake preparedness. The District will provide branded bottled water for the event, with related expenses to be reimbursed upon submission of receipts.

15. Rancho Pauma Mutual Water Company Ad-Hoc Committee Update

The Board received an update from the Rancho Pauma Mutual Water Company Ad-Hoc Committee regarding the settlement agreement. The Board acknowledged the settlement and discussed the remaining court documentation requiring release and signature. The Committee will continue working with the appropriate parties to complete the outstanding documents.

16. Solar Project Update

The Board received an update on the Solar Project, including ongoing efforts to correct SDG&E billing and properly allocate solar credits among the District's meters. The Board also discussed the status of the electric vehicle charging stations, the need for a panel upgrade, and obtaining additional proposals to complete the installation. Access and possible usage fees for the charging stations will be considered at a future meeting.

17. San Diego Local Agency Formation Commission (LAFCO) Status

The Board received an update on the San Diego Local Agency Formation Commission (LAFCO) annexation process. Discussion included beginning the necessary engineering work, confirming the affected parcels, and preparing maps and legal descriptions for the application. Work is expected to continue through 2026, whereas the annexation process is estimated to take approximately 12 to 18 months.

18. Board of Directors Term Details and Upcoming General Election

The Board discussed the upcoming General Election and the three Board seats available for election. As of the meeting date, no candidates had filed for the open seats. The candidate filing deadline was reported as August 7, 2026, and the Board discussed conducting additional community outreach to encourage qualified residents to apply.

– ACTION ITEMS –

19. Sewer System Management Plan (SSMP) Presentation and Approval

The District is required by the State Water Resources Control Board to develop and maintain an accurate up-to-date Sewer System Management Plan (SSMP) that is also subject to specified deadlines of compliance – The District must submit an updated SSMP by August 2nd, 2026, that considers the newly updated regulatory orders specific to SSMP's.

Staff Recommendation:

1. Approve the newly updated Sewer System Management Plan.
2. Discuss and take action as appropriate.

Jim with Fischer Compliance, LLC presented the updated SSMP and reviewed its regulatory requirements, system mapping, maintenance programs, and staffing training. Following discussion, the Board approved the SSMP for submission by the August 2, 2026 deadline.

Motion: Approve and adopt the updated Sewer System Management Plan (SSMP) as presented.

Result: Approved

Moved by: Director Collins

Seconded by: Director Levy

20. Introduction of Amendment to Ordinance Fifty-Five (55): Policies and procedures for Gate Access within the Pauma Valley Country Club Estates

The Board of Directors will consider the initial introduction and reading of the newly updated Ordinance (55), where the language has been enhanced for clarity, specific to the District's authority on the deactivation of Radio Frequency Identification Devices (RFIDs) utilized to access the Pauma Valley Country Club Estates (PVCCE).

Staff Recommendation:

1. Approve the Amended Ordinance 55 as presented.
2. Authorize staff to bring this item back to future Regular Meeting of the Board for final approval and adoption.
3. Discuss and take other action as appropriate.

Staff presented the proposed amendment to Ordinance No. 55, which removes the homeowner exemption language and clarifies the District's authority over gate access. Following discussion and legal clarification, the Board approved the introduction and first reading of the amendment.

Motion: Approve the introduction and first reading of the amended Ordinance No. 55 as presented and direct staff to bring the ordinance back to a future Regular Board Meeting for final approval and adoption.

Result: Approved

Moved by: Director Levy

Seconded by: Director Collins

– INFORMATIONAL ITEMS –

21. General Manager's Report

General Manager Eric Steinlicht reported on current staffing and recruitment efforts, the upcoming transition following the Office Manager's departure, and plans for temporary administrative support. He also provided updates on the proposed compensation study, development of the District's CMMS/GIS system, and plans for an anonymous employee satisfaction survey.

22. Miscellaneous Items

A. Requested Items for future agendas (**Directors and Staff Only**)

- a) Salary and Total Compensation Study (In Progress)
- b) Critical Spare Part Inventory/Replacement Program and Computerized Maintenance Management System (CMMS) (In Progress)
- c) Employee Satisfaction Survey (In Progress)

B. Next Regular Meeting of the Board:

- a) Monday, September 28th, 2026, at 10:00 AM

– CLOSED SESSION –

23. The Board of Directors will meet in a Closed Session to discuss:
- A. CONFERENCE WITH LEGAL COUNSEL
Existing Litigation
Pursuant to Government Code Section 54956.9(d)(1)
Rancho Pauma Mutual Water Company vs Pauma Valley Community Services District
(San Diego Superior Court Case No. 37-2023-00038164-CU-BC-NC)
 - B. CONFERENCE WITH LEGAL COUNSEL
Potential/Threatened/Anticipated Litigation
Significant Exposure to Litigation Pursuant to Government Code Section 54956.9(b)
(Three (3) Matters)

The Board entered closed session at 11:35 a.m.

24. Open Session
- A. Reportable Actions.

The Board reconvened to open session at 12:17 p.m.

Item 23(A) – Conference with Legal Counsel: Rancho Pauma Mutual Water Company Litigation

Regarding Item 23(A), the Board approved a settlement agreement between the Pauma Valley Community Services District and Rancho Pauma Mutual Water Company resolving the litigation concerning ownership and title to the property located at 33129 Cole Grade Road, Pauma Valley, California. As part of the settlement, the parties acknowledged the previously executed long-term lease.

Motion: Approve the settlement agreement with Rancho Pauma Mutual Water Company.

Result: Approved (4-0: Director Esparza absent)

Moved by: Director Nelson

Seconded by: Director Collins

25. Adjournment
- With nothing further to discuss, the meeting adjourned at 12:25 p.m.

Maritza Chaloux

Maritza Chaloux, Recording Secretary

**SETTLEMENT AGREEMENT AND
GENERAL RELEASE OF ALL CLAIMS**

This Settlement and General Release of All Claims (hereinafter "Agreement") is made and entered into as of July 27, 2026 (the "Effective Date"), by and between PAUMA VALLEY COMMUNITY SERVICES DISTRICT ("Defendant"), a public entity, on the one hand, and RANCHO PAUMA MUTUAL WATER COMPANY ("Plaintiff"), on the other hand. The parties to this Agreement are sometimes referred to in this Agreement collectively as the "Parties," or individually as a "Party."

**I.
RECITALS**

WHEREAS, Plaintiff alleges issues with the use and ownership interest of the building located at 33129 Cole Grade Road, Pauma Valley, California (the "Building"), including issues relating to the asserted lack of a lease, an ownership interest in the Building, alleged possessory rights, the thirty-day notice to vacate and termination of an administrative services agreement, (the "Dispute");

WHEREAS, on or about September 1, 2023, Rancho Pauma filed a Complaint in the Superior Court of California, County of San Diego; Case No. 37-2023-00038164-CU-BC-NC, against Defendant (the "Action").

WHEREAS, on October 14, 2024, Plaintiff filed a Request for Dismissal in the Action, signed by Plaintiff's counsel without prejudice.

WHEREAS, the Parties have agreed for Dismissal in the Action with prejudice, agreeing to a long-term lease which is at a reduced rent below market value.

WHEREAS, the Parties now desire to fully and finally resolve the Dispute, the Action, and all claims that were or could have been asserted therein, without any admission of liability by any Party.

**II.
AGREEMENT**

NOW, THEREFORE, in consideration of the promises and agreements hereinafter set forth, it is hereby agreed by and between the Parties as follows:

1. Mutual Release and Covenant Not to Interfere

1.1 Plaintiff hereby releases, acquits, and forever discharges the Defendant, including its officers, employees, agents, successors, and assigns, from any and all claims, demands, causes of action, damages, or liabilities of any kind, whether known or unknown, arising from or related to the allegations in the Dispute. Further, Plaintiff waives any claim to an ownership interest in the Building or any claim for title.

1.2 Defendant has entered a long-term lease and addendum for a portion of the Building with Plaintiff, attached as Exhibit A to this release. The long-term lease was negotiated at a discounted rent to Plaintiff and serves as consideration for this settlement.

1.3 Effective as of the Effective Date, and except for obligations expressly created by this Settlement Agreement, each Party, on behalf of itself and its past and present agents, servants, partners, joint venturers, alter egos, employees, and all persons acting by, through, or in concert with them, fully and forever releases, acquits, and discharges the other Party and its past and present agents, servants, partners, joint venturers, alter egos, and employees from any and all claims, demands, causes of action, damages, costs, expenses, and liabilities of every kind, whether known or unknown, suspected or unsuspected, that were asserted or could have been asserted in the Action or that arise out of or relate to the Dispute, including but not limited to claims concerning: (1) BREACH OF IMPLIED-IN-FACT CONTRACT; (2) BREACH OF JOINT VENTURE AGREEMENT; (3) NEGLIGENT MISREPRESENTATION; (4) INTENTIONAL MISREPRESENTATION; (5) FALSE PROMISE; (6) UNJUST ENRICHMENT; (7) PROMISSORY ESTOPPEL; OR (8) DECLARATORY RELIEF. Notwithstanding the foregoing, this release does not apply to enforcement of any monies owed resulting from the Administrative Services agreement (ASA) or termination of the ASA that are not related to the Dispute or the Action.

1.4 The Parties, and each of them, shall bear their own attorneys' fees, costs and expenses incurred in or as a result of the Dispute, including any and all fees, costs, and expenses, and also including attorneys' fees and costs incurred in the preparation of this Agreement.

1.5 Covenant Not to Sue; Dismissal of Action

Each Party covenants and agrees not to commence, assert, or maintain any lawsuit, claim, or proceeding against the other Party or its agents or employees with respect to any claim released in Section 1.3, including any claim arising from or relating to the Notice, claim to ownership of the Building or the Parties' sharing of facilities, except to enforce the terms of this Settlement Agreement. This release specifically excludes enforcement of any monies owed resulting from the ASA or termination of ASA that are not related to the Dispute or the Action.

The Parties shall cooperate to file a request for dismissal of the Action with prejudice as to all claims and causes of action, with each side to bear its own fees and costs, except as otherwise provided in this Settlement Agreement.

1.6 No Admission of Liability

The Parties acknowledge and agree that this Settlement Agreement and the consideration exchanged constitute a compromise of disputed claims, that the Notice and all responses thereto were disputed, and that nothing in this Settlement Agreement shall be construed as an admission of liability, fault, or wrongdoing by any Party in connection with the Dispute, the Action, the Building, or the Administrative Services Agreement.

2. General Release of Claims

2.1 The Parties, for themselves and their assigns, executors, administrators and successors, hereby forever release and discharge one another, their employees, board members, principals, agents, officers, directors, attorneys, servants, representatives, predecessors, successors in interest, contractors, subcontractors, assignees, volunteers, insurers and all others for whom they may be legally responsible, or who may be legally responsible for them (the "Released Parties"), from any and all demands, liens, assignments, contracts, covenants, actions, suits, causes of action, obligations, costs, expenses, attorneys' fees, damages, losses, claims, controversies, judgments, orders, and liabilities of whatsoever character, nature and kind, known or unknown, suspected or unsuspected, whether or not concealed or hidden, that relate to or arise from the Dispute, or the facts alleged therein, including, but not limited to any and all claims that were or may have been asserted by Plaintiff in the Dispute. In furtherance of this release, the Parties expressly, knowingly, and voluntarily waive any and all rights or benefits conferred upon them by the provisions of California Civil Code section 1542 and/or any similar state or federal law. California Civil Code section 1542 provides as follows:

A GENERAL RELEASE DOES NOT EXTEND TO CLAIMS WHICH THE CREDITOR DOES NOT KNOW OR SUSPECT TO EXIST IN HIS OR HER FAVOR AT THE TIME OF EXECUTING THE RELEASE, WHICH IF KNOWN BY HIM OR HER MUST HAVE MATERIALLY AFFECTED HIS OR HER SETTLEMENT WITH THE DEBTOR.

The Parties expressly waive Civil Code section 1542 and expressly agree and consent that the within release shall be given full force and effect in accordance with each and all of its express terms and provisions, relating to known and unsuspected claims, damages, liabilities, demands, or causes of action. Notwithstanding anything to the contrary in this Section 2.1, the Parties' releases and their waiver of California Civil Code section 1542 do not extend to, and expressly exclude, any enforcement of any monies owed resulting from the ASA or termination of the ASA that are not related to the Dispute or the Action.

2.2 Plaintiff irrevocably and absolutely agrees that they will neither prosecute nor allow to be prosecuted on its behalf, in any administrative agency, whether federal or state, or in any court, arbitration proceeding, or tribunal, whether federal or state, any claim or demand of any type related to the matters released in this Agreement, it being the intention of the Parties that with the execution of this Agreement, the Defendant and the Released Parties will be absolutely, unconditionally, and forever discharged of and from all obligations to or on their behalf related in any way to the matters discharged herein.

3. Dismissal of Action

Within five (5) business days of the execution of the Effective Date, Plaintiff shall file a Request for Dismissal with Prejudice of the Action in its entirety with each side to bear its own fees and costs as set forth herein. This with-prejudice dismissal supersedes any prior request for dismissal without prejudice. The dismissal with prejudice shall not apply to, or impair, any claims preserved by the Administrative Services Agreement carve-out in Sections 1.3, 1.5, and 2.1.

4. General Provisions

4.1 This Agreement has been fully reviewed by the Parties hereto and their respective counsel. The Parties hereto expressly waive any common law or statutory rule of construction that ambiguities should be construed against the drafter of this Agreement.

4.2 The Parties agree that this Agreement constitutes a settlement, compromise and full accord and satisfaction of disputed claims and shall not be treated as an admission of liability or fault by any Party, for any purpose. The Parties also agree and acknowledge that Defendants deny any wrongdoing on their part or that of their agents, employees, or others associated with them, past and/or present, and specifically deny any and all of the allegations as set forth by Plaintiff in the Dispute.

4.3 The Parties further declare and represent that this Agreement contains the entire agreement between them and that the terms of this Agreement, including the RECITALS, are contractual and not a mere recital.

4.4 Each Party will be entitled to recover from any other party any attorneys' fees and costs, including investigative costs, incurred to enforce their rights in the duties or obligations created within this Agreement, or incurred as a result of the failure of any Party to perform its obligations or duties as set forth in this Agreement. Without limiting the generality of the foregoing, if any litigation, arbitration, mediation, administrative action or other proceeding ("Proceeding") is initiated by any Party against any other Party to enforce, interpret, or otherwise obtain judicial, quasi-judicial, or administrative relief in connection with this Agreement, the prevailing Party(ies) in such Proceeding shall be entitled to recover from the unsuccessful Party(ies) all costs, expenses, and actual attorneys' fees relating to or arising out of (a) such Proceeding (whether or not such Proceeding proceeds to judgment), and (b) any post-judgment or post-award proceeding including, without limitation, one to enforce or collect any judgment or award resulting from any such Proceeding.

4.5 No waiver by any Party of any breach of this Agreement by any other Party shall operate or be construed as a waiver of any other breach or any subsequent breach, whether material or otherwise. No waiver by any Party of any breach of this Agreement by any other Party shall be effective unless it is in writing and signed by the Party claimed to have waived such breach.

4.6 This Agreement may be amended only by a written instrument executed by all the Parties hereto.

4.7 The Parties, and each of them, represent and warrant that:

4.7.1 They have not heretofore assigned or transferred, or purported to assign or transfer, to any person or entity, any right or claim being hereby released, or any portion thereof, or any interest therein; and

4.7.2 They are the sole owner of the rights and claims which are alleged or constitute the claims being hereby released.

4.7.3 They are executing this Agreement voluntarily, without undue influence or coercion by any person or entity, with a full understanding of the terms of this Agreement, and by advice of counsel.

4.8 Should any court, arbitrator, or tribunal of competent jurisdiction determine that any term or provision of this Agreement is unenforceable, such term or provision shall be deemed to be deleted as though it had never been a part of this Agreement, and the validity, legality, and enforceability of the remaining terms and provisions shall not be in any way affected or imperiled thereby.

4.9 This Agreement shall be construed in accordance with the laws of the State of California. This Agreement shall not be construed against the Party preparing it but shall be construed as if all Parties jointly prepared this Agreement, and any uncertainty or ambiguity shall not be interpreted against any one Party.

4.10 Except as expressly referenced in this Agreement, the Parties agree that this Agreement contains the entire agreement between them, or any other Released Party, or any present or former agent or employees thereof, with respect to the matters addressed in this Agreement. It supersedes and replaces all prior negotiations, and all agreement proposed or otherwise, whether written or oral, concerning the subject matter of this Agreement. It is agreed that there are no collateral agreements or representations regarding the subject matter of this Agreement that are not contained in the Agreement.

4.11 The Parties shall promptly execute any and all instruments and documents and take all actions as may be reasonably required to effectuate this Agreement, or to complete and carry out its intent.

5. Lease Agreement as Consideration of this Agreement

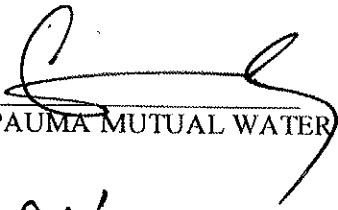
As consideration, the Parties shall concurrently execute a long-term lease for the Building on the terms attached as Exhibit A; the Parties' obligations to file a dismissal with prejudice are conditioned upon execution and delivery of the lease.

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4.12 If any dispute shall arise among the parties regarding the enforcement of the terms and conditions of this Agreement, the "prevailing party" shall be entitled to be reimbursed for all costs, including reasonable attorneys' fees, and the San Diego County Superior Court shall retain jurisdiction to enforce the terms of the settlement, under Code of Civil Procedure section 664.6.

4.13 This Agreement may be executed in one or more counterparts and shall become effective as to each Party immediately following execution of the Agreement by that Party, provided neither Party may enforce this Agreement unless it has also agreed to be bound by it by executing and providing the executed Agreement to the other Party. In the event an executed original signature page signed by either Party is transmitted by facsimile, electronic mail or photocopied, a received facsimile transmission, electronic mail document or photocopy of the signature page together with a copy of the remaining pages of this Agreement shall constitute an "original" as that term is defined by California Evidence Code section 255 and shall be fully effective and binding as to the signatory.

Sent. 9, 2026
DATED: July , 2026


RANCHO PAUMA MUTUAL WATER COMPANY,
Plaintiff

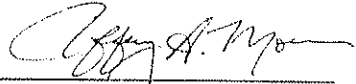
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DATED: July , 2026

Jared Nelson
PAUMA VALLEY COMMUNITY SERVICES
DISTRICT, Defendant

Approved as to form by:

DEVANEY PATE MORRIS & CAMERON, LLP

DATED: July 30, 2026

By: 
Jeffery A. Morris
Attorneys for Defendant
DEVANEY PATE MORRIS & CAMERON, LLP

DATED: July , 2026

By: _____
L. John Nelson IV
Attorneys for Plaintiff
PROCOPIO, CORY, HARGREAVES & SAVITCH
LLP

**SETTLEMENT AGREEMENT AND
GENERAL RELEASE OF ALL CLAIMS**

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**I.
RECITALS**

WHEREAS, Plaintiff alleges issues with the use and ownership interest of the building located at 33129 Cole Grade Road, Pauma Valley, California (the "Building"), including issues relating to the asserted lack of a lease, an ownership interest in the Building, alleged possessory rights, the thirty-day notice to vacate and termination of an administrative services agreement, (the "Dispute");

WHEREAS, on or about September 1, 2023, Rancho Pauma filed a Complaint in the Superior Court of California, County of San Diego; Case No. 37-2023-00038164-CU-BC-NC, against Defendant (the "Action".)

WHEREAS, on October 14, 2024, Plaintiff filed a Request for Dismissal in the Action, signed by Plaintiff's counsel without prejudice.

WHEREAS, the Parties have agreed for Dismissal in the Action with prejudice, agreeing to a long-term lease which is at a reduced rent below market value.

WHEREAS, the Parties now desire to fully and finally resolve the Dispute, the Action, and all claims that were or could have been asserted therein, without any admission of liability by any Party.

**II.
AGREEMENT**

NOW, THEREFORE, in consideration of the promises and agreements hereinafter set forth, it is hereby agreed by and between the Parties as follows:

1. Mutual Release and Covenant Not to Interfere

1.1 Plaintiff hereby releases, acquits, and forever discharges the Defendant, including its officers, employees, agents, successors, and assigns, from any and all claims, demands, causes of action, damages, or liabilities of any kind, whether known or unknown, arising from or related to the allegations in the Dispute. Further, Plaintiff waives any claim to an ownership interest in the Building or any claim for title.

1.2 Defendant has entered a long-term lease and addendum for a portion of the Building with Plaintiff, attached as Exhibit A to this release. The long-term lease was negotiated at a discounted rent to Plaintiff and serves as consideration for this settlement.

1.3 Effective as of the Effective Date, and except for obligations expressly created by this Settlement Agreement, each Party, on behalf of itself and its past and present agents, servants, partners, joint venturers, alter egos, employees, and all persons acting by, through, or in concert with them, fully and forever releases, acquits, and discharges the other Party and its past and present agents, servants, partners, joint venturers, alter egos, and employees from any and all claims, demands, causes of action, damages, costs, expenses, and liabilities of every kind, whether known or unknown, suspected or unsuspected, that were asserted or could have been asserted in the Action or that arise out of or relate to the Dispute, including but not limited to claims concerning: (1) BREACH OF IMPLIED-IN-FACT CONTRACT; (2) BREACH OF JOINT VENTURE AGREEMENT; (3) NEGLIGENT MISREPRESENTATION; (4) INTENTIONAL MISREPRESENTATION; (5) FALSE PROMISE; (6) UNJUST ENRICHMENT; (7) PROMISSORY ESTOPPEL; OR (8) DECLARATORY RELIEF. Notwithstanding the foregoing, this release does not apply to enforcement of any monies owed resulting from the Administrative Services agreement (ASA) or termination of the ASA that are not related to the Dispute or the Action.

1.4 The Parties, and each of them, shall bear their own attorneys' fees, costs and expenses incurred in or as a result of the Dispute, including any and all fees, costs, and expenses, and also including attorneys' fees and costs incurred in the preparation of this Agreement.

1.5 Covenant Not to Sue; Dismissal of Action

Each Party covenants and agrees not to commence, assert, or maintain any lawsuit, claim, or proceeding against the other Party or its agents or employees with respect to any claim released in Section 1.3, including any claim arising from or relating to the Notice, claim to ownership of the Building or the Parties' sharing of facilities, except to enforce the terms of this Settlement Agreement. This release specifically excludes enforcement of any monies owed resulting from the ASA or termination of ASA that are not related to the Dispute or the Action.

The Parties shall cooperate to file a request for dismissal of the Action with prejudice as to all claims and causes of action, with each side to bear its own fees and costs, except as otherwise provided in this Settlement Agreement.

1.6 No Admission of Liability

The Parties acknowledge and agree that this Settlement Agreement and the consideration exchanged constitute a compromise of disputed claims, that the Notice and all responses thereto were disputed, and that nothing in this Settlement Agreement shall be construed as an admission of liability, fault, or wrongdoing by any Party in connection with the Dispute, the Action, the Building, or the Administrative Services Agreement.

2. General Release of Claims

2.1 The Parties, for themselves and their assigns, executors, administrators and successors, hereby forever release and discharge one another, their employees, board members, principals, agents, officers, directors, attorneys, servants, representatives, predecessors, successors in interest, contractors, subcontractors, assignees, volunteers, insurers and all others for whom they may be legally responsible, or who may be legally responsible for them (the "Released Parties"), from any and all demands, liens, assignments, contracts, covenants, actions, suits, causes of action, obligations, costs, expenses, attorneys' fees, damages, losses, claims, controversies, judgments, orders, and liabilities of whatsoever character, nature and kind, known or unknown, suspected or unsuspected, whether or not concealed or hidden, that relate to or arise from the Dispute, or the facts alleged therein, including, but not limited to any and all claims that were or may have been asserted by Plaintiff in the Dispute. In furtherance of this release, the Parties expressly, knowingly, and voluntarily waive any and all rights or benefits conferred upon them by the provisions of California Civil Code section 1542 and/or any similar state or federal law. California Civil Code section 1542 provides as follows:

A GENERAL RELEASE DOES NOT EXTEND TO CLAIMS WHICH THE CREDITOR DOES NOT KNOW OR SUSPECT TO EXIST IN HIS OR HER FAVOR AT THE TIME OF EXECUTING THE RELEASE, WHICH IF KNOWN BY HIM OR HER MUST HAVE MATERIALLY AFFECTED HIS OR HER SETTLEMENT WITH THE DEBTOR.

The Parties expressly waive Civil Code section 1542 and expressly agree and consent that the within release shall be given full force and effect in accordance with each and all of its express terms and provisions, relating to known and unsuspected claims, damages, liabilities, demands, or causes of action. Notwithstanding anything to the contrary in this Section 2.1, the Parties' releases and their waiver of California Civil Code section 1542 do not extend to, and expressly exclude, any enforcement of any monies owed resulting from the ASA or termination of the ASA that are not related to the Dispute or the Action.

2.2 Plaintiff irrevocably and absolutely agrees that they will neither prosecute nor allow to be prosecuted on its behalf, in any administrative agency, whether federal or state, or in any court, arbitration proceeding, or tribunal, whether federal or state, any claim or demand of any type related to the matters released in this Agreement, it being the intention of the Parties that with the execution of this Agreement, the Defendant and the Released Parties will be absolutely, unconditionally, and forever discharged of and from all obligations to or on their behalf related in any way to the matters discharged herein.

3. Dismissal of Action

Within five (5) business days of the execution of the Effective Date, Plaintiff shall file a Request for Dismissal with Prejudice of the Action in its entirety with each side to bear its own fees and costs as set forth herein. This with-prejudice dismissal supersedes any prior request for dismissal without prejudice. The dismissal with prejudice shall not apply to, or impair, any claims preserved by the Administrative Services Agreement carve-out in Sections 1.3, 1.5, and 2.1.

4. General Provisions

4.1 This Agreement has been fully reviewed by the Parties hereto and their respective counsel. The Parties hereto expressly waive any common law or statutory rule of construction that ambiguities should be construed against the drafter of this Agreement.

4.2 The Parties agree that this Agreement constitutes a settlement, compromise and full accord and satisfaction of disputed claims and shall not be treated as an admission of liability or fault by any Party, for any purpose. The Parties also agree and acknowledge that Defendants deny any wrongdoing on their part or that of their agents, employees, or others associated with them, past and/or present, and specifically deny any and all of the allegations as set forth by Plaintiff in the Dispute.

4.3 The Parties further declare and represent that this Agreement contains the entire agreement between them and that the terms of this Agreement, including the RECITALS, are contractual and not a mere recital.

4.4 Each Party will be entitled to recover from any other party any attorneys' fees and costs, including investigative costs, incurred to enforce their rights in the duties or obligations created within this Agreement, or incurred as a result of the failure of any Party to perform its obligations or duties as set forth in this Agreement. Without limiting the generality of the foregoing, if any litigation, arbitration, mediation, administrative action or other proceeding ("Proceeding") is initiated by any Party against any other Party to enforce, interpret, or otherwise obtain judicial, quasi-judicial, or administrative relief in connection with this Agreement, the prevailing Party(ies) in such Proceeding shall be entitled to recover from the unsuccessful Party(ies) all costs, expenses, and actual attorneys' fees relating to or arising out of (a) such Proceeding (whether or not such Proceeding proceeds to judgment), and (b) any post-judgment or post-award proceeding including, without limitation, one to enforce or collect any judgment or award resulting from any such Proceeding.

4.5 No waiver by any Party of any breach of this Agreement by any other Party shall operate or be construed as a waiver of any other breach or any subsequent breach, whether material or otherwise. No waiver by any Party of any breach of this Agreement by any other Party shall be effective unless it is in writing and signed by the Party claimed to have waived such breach.

4.6 This Agreement may be amended only by a written instrument executed by all the Parties hereto.

4.7 The Parties, and each of them, represent and warrant that:

4.7.1 They have not heretofore assigned or transferred, or purported to assign or transfer, to any person or entity, any right or claim being hereby released, or any portion thereof, or any interest therein; and

4.7.2 They are the sole owner of the rights and claims which are alleged or constitute the claims being hereby released.

4.7.3 They are executing this Agreement voluntarily, without undue influence or coercion by any person or entity, with a full understanding of the terms of this Agreement, and by advice of counsel.

4.8 Should any court, arbitrator, or tribunal of competent jurisdiction determine that any term or provision of this Agreement is unenforceable, such term or provision shall be deemed to be deleted as though it had never been a part of this Agreement, and the validity, legality, and enforceability of the remaining terms and provisions shall not be in any way affected or imperiled thereby.

4.9 This Agreement shall be construed in accordance with the laws of the State of California. This Agreement shall not be construed against the Party preparing it but shall be construed as if all Parties jointly prepared this Agreement, and any uncertainty or ambiguity shall not be interpreted against any one Party.

4.10 Except as expressly referenced in this Agreement, the Parties agree that this Agreement contains the entire agreement between them, or any other Released Party, or any present or former agent or employees thereof, with respect to the matters addressed in this Agreement. It supersedes and replaces all prior negotiations, and all agreement proposed or otherwise, whether written or oral, concerning the subject matter of this Agreement. It is agreed that there are no collateral agreements or representations regarding the subject matter of this Agreement that are not contained in the Agreement.

4.11 The Parties shall promptly execute any and all instruments and documents and take all actions as may be reasonably required to effectuate this Agreement, or to complete and carry out its intent.

5. Lease Agreement as Consideration of this Agreement

As consideration, the Parties shall concurrently execute a long-term lease for the Building on the terms attached as Exhibit A; the Parties' obligations to file a dismissal with prejudice are conditioned upon execution and delivery of the lease.

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4.12 If any dispute shall arise among the parties regarding the enforcement of the terms and conditions of this Agreement, the "prevailing party" shall be entitled to be reimbursed for all costs, including reasonable attorneys' fees, and the San Diego County Superior Court shall retain jurisdiction to enforce the terms of the settlement, under Code of Civil Procedure section 664.6.

4.13 This Agreement may be executed in one or more counterparts and shall become effective as to each Party immediately following execution of the Agreement by that Party, provided neither Party may enforce this Agreement unless it has also agreed to be bound by it by executing and providing the executed Agreement to the other Party. In the event an executed original signature page signed by either Party is transmitted by facsimile, electronic mail or photocopied, a received facsimile transmission, electronic mail document or photocopy of the signature page together with a copy of the remaining pages of this Agreement shall constitute an "original" as that term is defined by California Evidence Code section 255 and shall be fully effective and binding as to the signatory.

DATED: July __, 2026

RANCHO PAUMA MUTUAL WATER COMPANY,
Plaintiff

DATED: July 30, 2026

Jeff Nelson
PAUMA VALLEY COMMUNITY SERVICES
DISTRICT, Defendant

Approved as to form by:

DEVANEY PATE MORRIS & CAMERON, LLP

DATED: July 30, 2026

By: Jeffery A. Morris
Jeffery A. Morris
Attorneys for Defendant
DEVANEY PATE MORRIS & CAMERON, LLP

DATED: July 30, 2026

By: L. John Nelson IV
L. John Nelson IV
Attorneys for Plaintiff
PROCOPIO, CORY, HARGREAVES & SAVITCH
LLP

**PAUMA VALLEY COMMUNITY SERVICES DISTRICT
SECURITY REPORT**

July 11, 2026 – August 10, 2026

Pauma Valley CSD Security Department Personnel		
Name	Call Sign	Billet
Officer Todd Albert	1L1	General Service Supervisor
Officer Dale Easter	1L2	Patrolman / Security Lead
Officer Eduardo Aguilar	1L3	Patrolman
Officer Luis Orozco	1L4	Patrolman
Officer German Colin	1L5	Patrolman
Officer Zachary Meyer	1L7	Patrolman
Gerardo Gonzalez	C1/1L6	Gate Attendant / Patrolman
Matthew Carson	C1	Gate Attendant
Lucas McElvain	C1	Gate Attendant
Jose Solis	C1	Gate Attendant
Kyle Trejo	C1	Gate Attendant

Vehicle Maintenance Report

Tesla 01 (132,756)

- Unit 1 front tires may need replacing soon.
- Driver seat controls are malfunctioning.
- TPMS fault warning is on.
- Charging port cover is intermittently malfunctioning; it opens and closes during driving.

Tesla 02 (139,037)

- TPMS fault warning is on
- Two tires were replaced by Serratos Auto Shop on 7/13/26
- Driver seat controls are malfunctioning.
- Passenger-side skirt is damaged.
- The front bumper has a crack due to low ground clearance.

German Colin, Vehicle Maintenance Officer

Gate Security Report

- This past month, the security camera system has been operational and working properly. There were a few barrier arm malfunctions that required maintenance. COR Security responded on several occasions to perform repairs and routine maintenance. Caltrans also performed roadwork on Highway 76, resulting in increased traffic and delays at the Front Gate. Traffic conditions have since cleared up, and gate conditions have returned to normal. A new Gate Attendant began training on August 10. In addition, one of our current Gate Attendants will transfer to the CSD Utility Department, effective August 19. A part-time Gate Attendant position remains open.

Matthew Carson, Gate Supervisor

ACTIVITY LOG

July 11, 2026, 1717, Resident Concern: Control 1 received a call from a resident reporting a burgundy Volkswagen SUV speeding through the community, nearly causing an accident. Officer Aguilar responded and conducted a thorough search of all streets within the community, starting with the vehicle's reported location and direction. The vehicle was observed exiting through the back gate. The vehicle's information was recorded for future encounters.
July 11, 2026, 1806, Resident Concern: Control 1 received a call from a resident on Luiseno Circle Dr, requesting patrol assistance in locating her two teenage daughters who had left the residence on foot and had not returned home. The resident requested that patrol monitor the community to ensure the juveniles did not leave the gated community and, if located, advise them to return home. Officer Aguilar searched the community but was unable to locate the juveniles. Officer Aguilar made contact with the resident for an update and was advised that the juveniles had not yet returned home. The resident stated she and a family member would continue searching for them.
July 11, 2026, at 2216, Resident Concern: Officers Aguilar and Meyer were dispatched to the back gate because 2 kids with backpacks were seen by a resident entering the community. The area was searched, and the officers were unable to locate the kids.
July 12, 2026, at 1932, Resident Concern: Control 1 received a call from a concerned resident reporting a juvenile walking along the roadway on Luiseno Circle Dr while crying and appearing to be in distress. Officer Aguilar responded, and upon arriving in the area, Officer Aguilar located the juvenile walking toward the front exit gate on Pauma Valley Dr. The officer attempted to make contact, but the juvenile refused to speak, wanted to be left alone, and continued walking. The juvenile exited the community, crossed to a nearby store, and continued southbound along the highway toward Rincon. Control 1 was advised to contact the sheriff to conduct a welfare check. A resident identified the juvenile as a community resident, and Control 1 was able to contact the juvenile's parent to advise them of the situation and the juvenile's direction of travel. The officer maintained visual observation of the juvenile from a safe distance as he continued walking past St Francis Church, towards Rincon, until the parent was notified and responded to retrieve him. No further assistance was required.
July 13, 2026, at 1217, Suspicious Vehicle: Control 1 reported a suspicious vehicle, a silver Jeep, driving around the parking lot at North Coast Church. Officer Easter made contact with the driver. The driver was a mother and daughter; the mother was teaching her daughter how to drive. Nothing else to report.
July 13, 2026, at 1437, Escort: Officer Easter escorted CPS to Luiseno Circle Dr. The agent made contact with the resident.
July 15, 2026, at 1012, North Coast Church: Officer Orozco discovered an unoccupied vehicle parked at the rear of the church; the vehicle was logged in D.A.R entry.
July 16, 2026, at 0653, Alarm: Officer Colin was dispatched to Serratos Auto for an alarm. He checked the building; all doors were secured, and there were no signs of forced entry. Control 1 notified the contact.
July 16, 2026, at 1140, Escort Insurance: Officer Easter escorted an insurance agent to take pictures of PVCSD.
July 16, 2026, at 1618, Process Server: Officer Easter escorted a process server to a residence on PVD. The server was unable to make contact with the owner. The server was escorted out through the front gate.
July 16, 2026, at 1605, Loose Dog: Officer Easter was dispatched to Temet for a loose dog. A black and white Husky was reported to be seen in the riverbed. The officer was unable to locate the dog.

July 16, 2026, at 1750, Gravel Yard 11.53: Officer Meyer found the reservoir gate unsecured. He was able to secure it.
July 16, 2026, at 1800, Resident Concern: Officer Meyer dispatched to Luiseno Circle Drive because a resident requested a patrol of the area to look out for her children riding bikes. Soon after, the request was canceled because the kids were back inside.
July 17, 2026, at 1000, Snake: While patrolling Luiseno Circle Dr, Officer Easter removed a rattlesnake from the road.
July 17, 2026, at 2050, Pauma School 11.53: Officer Meyer found both bathrooms by the custodian's room unlocked. He cleared the building but was unable to secure it. Control 1 to notify contact.
July 18, 2026, at 1119, Gate Runner: Officer Orozco responded to a report of a vehicle that entered the community without proper entry. The vehicle was observed leaving the community before contact could be made. Vehicle information and photo saved at the front gate BOL file.
July 18, 2026, at 0106, Water Leak: While patrolling the PVCSD Office, Officer Gonzalez observed a water leak. Officer Gonzalez reported to Control 1. After a bit of time passed, the water had turned off by itself. The leak was reported to Officers Albert and Easter.
July 18, 2026, at 1815, Gates Open: Officer Meyer found the Knox Gate by Hwy 76 open. Control 1 notified contact, and the gate was shut.
July 18, 2026, at 2020, Pauma School 11.53: Officer Meyer found both bathrooms by the custodian's room unlocked. He cleared the building but was unable to secure it. Control 1 to notify contact.
July 19, 2026, at 1451, Pauma School 11.53: Officer Orozco found both bathrooms by the custodian's room unlocked. He cleared the building but was unable to secure it. Control 1 to notify contact
July 19, 2026, at 1930, North Coast Church 11.53: Officer Meyer found both exterior bathrooms and the storage room under the stairs unlocked. He cleared and secured all doors. Control 1 to notify contact.
July 19, 2026, at 1955, Pauma Building 11.53: Officer Meyer found a key left in a P.O. Box. Control 1 notified the contact for the Post Office, and he said to leave the key on top of the vending machine because he couldn't get to it that night. Officer Meyer left the key on the vending machine.
July 19, 2026, at 2035, Pauma School 11.53: Officer Meyer found both bathrooms by the custodian's room unlocked. He cleared the building but was unable to secure it. Control 1 to notify contact.
July 20, 2026, at 1016, Trespassing: Officer Easter was dispatched to PVCC pool regarding a report of two individuals allegedly trespassing and attempting to use the pool shower facilities. While responding, Officer Easter was contacted by the individuals involved. They stated they had been informed by another gentleman that they were trespassing and were denied access to the pool. The individuals advised they were guests of a resident on Luiseno Circle Dr. They apologized for the misunderstanding and stated they would not return to the pool area.
July 20, 2026, at 1926 Medical: Control 1 advised over the scanner of a medical call at the store across the street from the club. Officer Aguilar responded; upon arrival, Cal Fire was already on scene treating an individual who had accidentally cut her arm from broken glass, resulting in significant bleeding. Emergency personnel assessed and treated the patient on scene. No transport was required.
July 20, 2026, at 2003, Resident Request: Control 1 received a call from a resident on Luiseno asking for help but did not say for what. Officer Aguilar made contact with the resident. The resident wanted Officer Aguilar to set up a camera for her in her front yard because she wanted to know if coyotes were jumping over her fence and eating her dog and cat food. Officer Aguilar was able to set up the camera for the resident.
July 20, 2026, at 2034, Process Server: Officer Aguilar was dispatched to escort a process server to a residence on Pauma Valley Dr. Officer Aguilar and the process server made contact with the resident and were able to deliver the documents.

July 20, 2026, at 2126, Pauma School 11.53: Officer Aguilar found the girls' bathroom by the custodian room and room 7 by the library unlocked. Officer Aguilar was able to clear the buildings but was unable to secure the doors. Control 1 to notify contact.
July 21, 2026, at 0706, Greens Maintenance Concern: A Greens maintenance employee called about a resident walking their dog without a leash in their yard. Officer Colin patrolled the area but was unable to locate the resident.
July 22, 2026, at 1143, Resident Report: Control 1 received a call from a resident reporting that their neighbor was suspected of consuming alcohol with friends before leaving the residence in a vehicle towards the front gate. Officer Easter responded and observed a vehicle matching the reported description traveling westbound on Highway 76 towards Pala, outside of the community. No further contact was made. The information was documented for record purposes.
July 21, 2026, at 2121, Pauma School 11.53: Officer Aguilar found the girls' bathroom by the custodian room and room 7 by the library unlocked. Officer Aguilar was able to clear the buildings but was unable to secure both doors. Control 1 to notify contact.
July 22, 2026, at 2230 Resident Request: A resident requested that a guest be escorted to their home when the guest arrived. Officer Orozco escorted a resident's guest to a residence within the community without incident.
July 22, 2026, at 2245, North Coast Church 11.53: Officer Orozco discovered an unsecured rear office door at North Coast Church. The building was cleared and secured, no signs of forced entry were found, and the church contact was notified.
July 23, 2026, at 0030, Pauma School 11.53: Officer Colin found the primary 1, 2, and 3 classrooms unsecured; he cleared the rooms but was unable to secure them. Control 1 to notify contact.
July 23, 2026, at 1220, Resident Request: Officer Easter was dispatched to Cahuka Ct. A resident requested patrol to enter their home to turn off their stove. The homeowners left and forgot to shut it off. The officer successfully turned off the stove.
July 23, 2026, at 1730, Open Gate: Officer Meyer found the Knox Gate on Hwy 76 open while patrolling. The resident was notified, and he was aware and had a worker in the area. He closed the gate when he was finished working.
July 24, 2026, at 0203, Traffic Collision: While patrolling inside the community, Officers Meyer and Colin found a vehicle that had crashed into a fence and tree on PVD. The driver was unharmed. Control 1 notified the resident, who did not want to involve the police. The officers took down the driver's license, insurance, license plate number, and phone number. The officers also took pictures of the vehicle and the damage done to the property. Officer Easter was notified of the situation. A tow truck removed the vehicle from the property.
July 24, 2026, at 1105, Incident Report: Officer Orozco followed up with a resident at the request of the PVCSD Office. Incident documentation was provided, and a copy of the report was given to the resident.
July 24, 2026, at 1311, Escort: Officer Orozco escorted a resident's guest from the rear gate to the front gate for proper entry.
July 24, 2026, at 1845, Gravel Yard 11.53: Officer Meyer found Well #42 leaking and sent videos to Control 1. Control 1 notified RPM Water about the leak, and they said they would take care of it when they are back in the office. No further action was taken.
July 24, 2026, at 1935, North Coast Church 11.53: Officer Meyer found the exterior men's restroom unsecured. He cleared and secured the building. Control 1 notified the contact.
July 25, 2026, at 0226, Open Gate: While patrolling greens maintenance, Officer Gonzalez found the back gate open. He was able to close the gate but not secure it.

July 25, 2026, at 1322, resident delivery: Officer Orozco retrieved a delivered binder from a residence while the resident was on vacation. The binder was returned to the CSD office for safekeeping, and officer easter was notified
July 25, 2026, at 1516, resident request: Officer Orozco responded to a resident request to search for a missing package. The reported areas were checked, but the package was not located.
July 26, 2026, at 0942, Guest Request: Officer Orozco responded to a request for a vehicle jump-start in the PVCC parking lot. An attempt was made to jump-start the vehicle, but it was unsuccessful. The member advised that AAA was already responding, and no further assistance was needed.
July 26, 2026, at 1239, Resident Concern: Officer Orozco responded to a resident concern regarding a pool motor reported to be running continuously at a neighbor's home. Control 1 was advised to contact the homeowner to inform them. Contact was made with a family member, who advised that someone would be sent to check on the property.
July 26, 2026, at 2005, Snake Call: While Officer Meyer was Code 5 at Oak Tree, a resident came to the vehicle and asked if he could capture a rattlesnake. They searched for the snake but were unable to find it in the bushes. No further action was taken.
July 26, 2026, at 2030, North Coast Church 11.53: Officer Meyer found both storage rooms under the staircases open. He cleared and secured both doors. Control 1 to notify contact in the morning.
July 26, 2026, at 2055, Pauma Village 11.53: Officer Meyer found one of the ice freezer locks unlocked. He was able to secure the lock. Control 1 to notify contact in the morning.
July 27, 2026, at 2003, Resident Concerns: Control 1 received a call from a resident regarding an unfamiliar white sedan parked in her driveway on Luiseno Circle Dr. The resident requested that patrol check the vehicle and determine who it belonged to. Control 1 identified the vehicle belonging to a neighbor and informed the resident. No further action was needed.
July 27, 2026, at 2314, Suspicious Person: Control 1 saw a white vehicle parked at Serratos after hours. The driver got out and walked around the area. Officer Aguilar contacted the individual and let him know he couldn't be wandering around the property after hours. The man stated that he was waiting for someone to show up. Officer Aguilar let him know to park under the lights where the front gate could get a better view of him. The individual ended up leaving the property.
July 29, 2026, at 0815, Loose Dog: A resident reported a black dog was loose on Wiskon Way West. Officer Easter was able to return the dog to its owner.
July 29, 2026, at 1350, Traffic Collision: Control 1 received a report of a traffic collision inside PVCCE near the Wiskon Way West intersection. A vehicle stopped after a large freight delivery truck made a sudden U-turn without signaling. A second vehicle was unable to stop in time and rear-ended the stopped vehicle. The freight delivery truck did not stop and continued towards the front gate. Officer Easter arrived on scene. Both drivers declined medical attention and exchanged insurance information. Driver and vehicle information, including license plate, was documented. The freight truck information was documented before entering the community.
July 29, 2026, at 1822, Pauma School 11.53: Officer Easter found classroom 15 unsecured. The officer cleared the building but was unable to secure the door. Control 1 to notify contact.
July 30, 2026, at 0805, Missing Child Report: Control one received a report of a possible missing child on Temet Dr. Information was received that a young child had been seen following a white dog near the farm. Officer Easter responded with a utility worker and conducted a search of the area but was unable to locate the child. Contact was later made at the child's residence, where it was confirmed that the child had briefly followed the dog, returned home safely, and was with a parent. After reviewing camera footage, it was observed that the family exited the community through the back gate at 0738. All parties involved in the search were notified that the child had been located and was safe. The information was documented.

July 31, 2026, at 0100, Pauma School 11.53: Officer Meyer found Bungalow 7 unlocked. He cleared the building but was unable to secure it. Control 1 to notify contact in the morning.
July 31, 2026, at 0140, Saint Francis 11.53: Officer Meyer found the main chapel double doors unlocked. He cleared the building but was unable to secure it. Control 1 to notify contact in the morning.
July 31, 2026, at 1131, Request: Officer Orozco responded to a front gate request regarding a service worker attempting to gain access to a residence. An attempt to make contact with the resident was made. Contact with the resident was unsuccessful, and the guest was denied access to the community.
July 31, 2026, at 1217, Resident Request: Officer Orozco responded to a resident request for assistance with vehicle access as they had locked the keys inside the vehicle. Officer Orozco assisted with a spare key, allowing the resident to gain access to the vehicle.
July 31, 2026, at 1401, Resident Request: Officer Orozco responded to a resident request for assistance with a home lockout. Prior to arrival, a neighbor assisted the resident with gaining access to the home. No further assistance was required
August 1, 2026, at 1121, Guest Concern: Officer Orozco responded to a report of a loose dog within the community. The dog was located near the pool area, the owner was identified, and the dog was returned to its owner without incident.
August 1, 2026, at 1257, Resident Request: Officer Orozco responded to a resident concern regarding an individual who was violating a restraining order. A foot patrol of the property was conducted, but the individual was not located. A vehicle associated with the individual was observed at the residence, and Control 1 verified the vehicle's entry into the community. Video footage was saved to the patrol device, and Officer Easter was notified.
August 1, 2026, at 1556, Medical: Officers Meyer and Orozco were dispatched to a medical call on Temet Drive. The resident had become dizzy and fallen. The fire department ran an assessment and encouraged the resident to go to the hospital. The resident was transported to the hospital.
August 1, 2026, at 2151, Medical: Officer Aguilar responded to a medical emergency on Wasa Ct, involving a resident who had fallen in the bathroom and sustained a head injury. Upon arrival, the resident was found conscious but lying on the bathroom floor with a bleeding head wound. Basic first aid was provided by attempting to control the bleeding. The officer monitored the resident's condition and kept alert until emergency medical personnel arrived. Fire/EMS assessed the resident, and one individual was transported for further medical treatment.
August 2, 2026, at 0441, Lift Assist: Officer Aguilar responded to a lift assist on PVD of an elderly resident who fell out of bed and was unable to get up. Upon arrival, the resident was found seated on the floor next to the bed. Before assisting the resident, she was asked if she was experiencing any pain and stated she was not. Officer Aguilar safely assisted her back into bed without incident. The resident also requested assistance loading her injured dog into her vehicle for transport to an emergency veterinary hospital. Officer Aguilar carefully lifted the dog and placed it safely in the back of the resident's vehicle.
August 2, 2026, at 1756, Gate Runner: Officer Orozco responded to a report of a possible tailgater at the back gate. Contact was made with the driver, who was advised of the proper guest entry procedures and directed to the front gate to gain access to the community.
August 2, 2026, at 1820, Request: Officer Orozco responded to verify whether an Instacart delivery driver was authorized to enter the community. An attempt was made to contact the resident, but no contact was made. The driver was denied access to the community.
August 2, 2026, 1911, Front Gate Arm Barrier: Officer Orozco responded to a report of a malfunctioning arm barrier at the front gate. Troubleshooting was attempted, including cleaning the scanner and resetting the system, but the issue could not be resolved. The arm barrier was placed in the up position. Control 1 was advised to monitor for tailgaters, and the office was notified.

August 3, 2026, at 0802, Medical: Officer Easter was dispatched to a medical call on Luiseno Circle Drive after a resident reported feeling ill and having trouble breathing. The resident stated she was located on the hillside near the Greens Maintenance Yard. Upon arrival, Officer Easter assessed the situation and provided oxygen while advising that emergency medical services be contacted. Paramedics arrived on scene, evaluated the resident, and obtained her vital signs. The resident declined transportation to the hospital, and family members arrived to take her home.
August 4, 2026, at 0821, Medical: Officer Easter was dispatched to Luiseno Circle regarding a resident who was reported to be experiencing dizziness. Upon contacting the resident, Officer Easter remained on scene while awaiting the arrival of emergency medical personnel. Cal Fire and Mercy personnel arrived on scene and evaluated the resident. Medical personnel obtained the resident's vital signs and determined she had low blood pressure. Due to the resident's age and medical condition, paramedics advised that she should be transported to the hospital for further evaluation and treatment. The resident was transported.
August 4, 2026, at 1634, Medical: Officer Easter was dispatched to Oak Tree on Happy Hallow Lane regarding a resident requiring medical assistance. Upon contacting the resident, Officer Easter remained on scene while awaiting the arrival of emergency medical personnel. Cal Fire and Mercy Medical personnel arrived on scene and evaluated the resident. The resident was experiencing medical symptoms related to his cancer diagnosis. Due to his condition, he was transported to the hospital for further evaluation.
August 5, 2026, at 1620, Gate Malfunction: Control 1 reported the front barrier arm had been malfunctioning while vehicles with transponders entered the gate. The barrier arm stayed in the upright position at times. The security gate company will be notified.
August 5, 2026, at 1818, Unsecured Door: Officer Easter found Hangar 16 unsecured. The owner was contacted and asked to close the hangar. The hangar was secured shortly after.
August 5, 2026, at 2144, Medical: Officer Colin was dispatched to a medical call on Womsi Rd. The resident had surgery and was feeling discomfort. Medics checked his vitals and then transported him to Palomar Hospital.
August 6, 2026, at 1354, Gate Runner: Officer Easter was dispatched for a gate runner at the front gate. A black Ford F-250 tailgated behind a vehicle and did not check in properly with the gate attendant. Officer Easter later found the vehicle at the country club. The vehicle was unoccupied; a NOV was issued. The vehicle later stopped at the front gate to inquire about the NOV that had been issued. The gate attendant informed the driver that the NOV was a warning advising her to properly check in at the front gate next time. The driver's information was documented.
August 6, 2026, at 1933, Resident Concern: Officer Meyer was dispatched to PVD for a fallen tree branch. The tree branch was found on PVD just past Cahuka Ct. Cones were placed around the tree branch to avoid a car accident. The resident and Roadway Association were notified of the tree by Control 1. The Roadway Association notified the officer that he would take care of it in the morning. No further action was taken.
August 6, 2026, at 2005, Damaged Property: Officer Meyer was dispatched to the Clubhouse by Officer Albert to investigate a damaged stop sign. When the officer arrived, the stop sign was bent and seemed to have been hit by a vehicle. A resident notified the officer that it had been like that for a few days. Pictures were taken and sent to Officers Easter and Albert.
August 6, 2026, at 2110, Pauma Building 11.53: Officer Meyer found doors 100 and 103 unlocked. He was able to clear and secure the building. Control 1 to notify contact in the morning.
August 7, 2026, at 0147, Snake Call: Officers Meyer and Colin dispatched to a snake call on Temet Dr. According to the resident, the snake had crawled along the edge of the cabinets and disappeared underneath them. The officers were unable to locate the snake.

August 7, 2026, at 2045, Pauma School 11.53: Officer Meyer found rooms 100 and 14 open. He was able to clear and secure both buildings. He also found two fire extinguisher boxes that looked like they were broken into. Control 1 contacted the school and was told that they opened the boxes to replace the fire extinguishers inside.
August 8, 2026, at 1708, Medical: Officer Orozco responded to a medical call on Luiseno Circle Dr. with no specific location provided. The correct residence was located, and contact was made with Cal-Fire on scene. The patient was located at the rear of the home experiencing dizziness and had fallen. The patient sustained injuries and was transported to Palomar Hospital for further evaluation.
August 8, 2026, at 1930, 11.53 North Coast Church: Officer Meyer found the double doors in the breezeway unsecured. He cleared and secured the building. Control 1 to notify contact.
August 9, 2026, at 0935, Resident Concern: Officer Orozco responded to a report of a dog on a resident's property. Contact was made with the resident, and the dog's owner was verified. The owner arrived and retrieved the dog without incident.
August 9, 2026, at 1000, Resident Concern: Officer Orozco responded to a reported water leak. The leak was located, and the appropriate maintenance and water services were notified. It was confirmed that repair personnel were already on the way. Officer Orozco stood by until repair personnel arrived on scene.
August 10, 2026, at 1328, resident concern- suspicious vehicle: Officer Orozco responded to a resident concern regarding a vehicle that had been parked in the same area for several days and had an expired pass. The vehicle was located, and the residential contact confirmed it belonged to a guest of a resident who was expected to return and retrieve the vehicle.
August 10, 2026, at 2122, 11.53 Pauma School: Officer Aguilar found the alarm to the main office not set, but both doors were secure. Officer Aguilar let control one know to notify the school.
August 10, 2026, at 0106, 11.53 Green Maintenance: Officer Aguilar found the back gate to Green's Maintenance wide open and unsecured.

RFID Entries						
Front Gate			Center Gate		Back Gate	
22731			2733		26919	
Dispatch By Location						
Inside PVCCE	Oak Tree	School	Business Dist.	St. Francis	PVCC	Hwy 76
36	2	12	9	1	5	1
Highlights by Shift Periods						
A: 2200-0600			B: 0600-1400		C: 1400-2200	
26			22		34	

PVCSD Patrol – Building Checks				
Location	Unsecured Door	Fire Alarm	Burglary Alarm	Officer Check
			459A	1153
Country Club(CC)				
Greens Maintenance(GM)	4			3
Community Church(CO)	4		1	64
Gravel Yard(GY)	2			68
Saint Francis(SF)	1			90
Pauma School(PS)	17			44
Pauma Building(PB)	4			54
Airport Hangars(AH)	2			62
Treatment Plant (TP)				64
Pauma Village (PV)	1			62
Residential Houses/Other	11		2	44

Patrol Activity				Gate Activity	
Medicals	10	Resident Concern	9	Activity/Malfunctions	Totals
Welfare Checks		Suspicious Activity	4	Unresponsive	0
Lift Assist	2	Noise Complaint		Will Not Close	1- Continuous
Domestic Dispute	3	Process Server	2	False Read	0
Traffic Collisions	3	911 Hang-up Call		Loss of Controls	Continuous
Gate Runner/ Gate Crashers	2/3	Loose Pets	4	Video Loss	0
Public Assists		Snake Call	5	Device Entries	53,577
Jump Start	1	Trespassing	2	Passes Issued	2590
Notice of Violation	1	Other	11	Pass Entries	6401

Acronym Legend			
Acronym	Definition	Acronym	Description
459	Burglary penal code	AFA	Asian Female Adult
AMA	Against Medical Advise	AMA	Asian Male Adult
BOLO	Be on the Lookout	AFJ	Asian Female Juvenile
CHP	California Highway Patrol	AMJ	Asian Male Juvenile
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DL	Driver License	BMA	Black Male Adult
DV	Domestic Violence	BFJ	Black Female Juvenile
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IVO	In Vicinity Of	HMA	Hispanic Male Adult
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S/O	Sheriff's Office	WMA	White Male Adult
SR 76	State Route 76/ Highway 76	WFJ	White Female Juvenile
TC	Traffic Collision	WMJ	White Male Juvenile
UTL	Unable to Locate		
WB	West Bound		
WWE	Wiskon Way East		
WWW	Wiskon Way West		
YOA	Years of Age		
Unresponsive	the gate does not open for an RFID		
Will Not Close	the gate does not close when it is supposed to		
False Signal	the alarm goes off in the Front Gate for no discernable reason		
Loss of Controls	gate attendant cannot open the gates remotely		
Video Loss	occurs when the gate attendant cannot see the feeds from the Center or Back Gates		

**PAUMA VALLEY COMMUNITY SERVICES DISTRICT
SECURITY REPORT**

August 11, 2026 – September 10, 2026

Pauma Valley CSD Security Department Personnel		
Name	Call Sign	Billet
Officer Todd Albert	1L1	General Services Supervisor
Officer Dale Easter	1L2	Patrolman / Security Services Lead
Officer Eduardo Aguilar	1L3	Patrolman
Officer Luis Orozco	1L4	Patrolman
Officer German Colin	1L5	Patrolman
Officer Zachary Meyer	1L7	Patrolman
Gerardo Gonzalez	C1/1L6	Gate Attendant / Patrolman
Matthew Carson	C1	Gate Attendant
Lucas McElvain	C1	Gate Attendant
Kyle Trejo	C1	Gate Attendant
Alex Demers	C1	Gate Attendant

Vehicle Maintenance Report

Tesla 01 (135,357)

- Scuff damage is present on the lower-right corner of the front bumper.
- Exterior vehicle wraps have sun damage.
- Rear passenger-side headliner, driver's seat cover, and steering-wheel cover are torn.
- Driver-side window tint is peeling.
- Charging-port cover is malfunctioning.
- Driver's seat trim is broken.
- Right-front tire tread is low and should be inspected for possible replacement.
- Left-front tire was repaired by Serratos Auto on September 4, 2026.
- Repairs are scheduled for September 15, 2026, for the TPMS fault, malfunctioning driver's seat controls, and loud A/C noise.

Tesla 02 (141,446)

- Front bumper and passenger-side skirt are damaged.
- Exterior vehicle wraps have sun damage.
- Driver's seat cover and steering-wheel cover are torn.
- Driver's seat trim is broken, and the seat controls are malfunctioning.
- Armrest cover needs replacement.
- Tire Pressure Monitoring System (TPMS) fault warning is illuminated.

German Colin, Vehicle Maintenance Officer

Gate Security Report

- The rear and center gate switch panel requires additional electrical repairs.
- All security cameras are operational.
- DwellingLive is running slowly under the Country Club profile.
- The front gate intercom "talk" button is sticking. COR Security is aware of both issues.
- Kyle Trejo and Alex Demers have completed gate training. Kyle is full-time, and Alex works overnight Friday through Sunday.

ACTIVITY LOG

August 11, 2026, at 0503, Resident Concern: Officer Colin was dispatched to a resident concern call on Pauma Valley Drive. The resident reported hearing an unknown noise outside her residence and requested that Patrol check the driveway and surrounding area for any suspicious activity. Officer Colin responded to the residence and conducted a patrol check of the driveway and surrounding area. No suspicious people, vehicles, activity, or unusual noises were observed or heard. No further action was required at the time.
August 11, 2026, at 0609, Medical: Officer Colin was dispatched to a medical call at a residence on Luiseno Circle Drive. The resident reported that he had not been feeling well since Sunday and had been advised by his doctor to call 911 if his symptoms continued. Emergency medical personnel responded, evaluated the resident, and checked his vital signs. The resident was transported to Palomar Hospital for further evaluation and testing.
August 11, 2026, at 2230, Pauma School 11.53: Officer Colin discovered Classroom 7 unsecured during patrol. Officer Colin checked and cleared the classroom but was unable to secure the door. Control 1 notified the contact.
August 12, 2026, at 0951, Resident Concern: A resident contacted Dispatch requesting a welfare check on a neighboring residence on Wiskon Way West after hearing a loud noise that appeared to come from inside the residence. Officer Easter responded and attempted to contact the occupant but received no response. The residence appeared to be unoccupied at the time. Dispatch also attempted to contact the resident by telephone but was unsuccessful. No further action was required.
August 13, 2026, at 2020, Pauma School 11.53: Officer Orozco discovered an unsecured room and two restrooms during a building check. The area was cleared but unable to be secured. Control 1 notified the contact.
August 13, 2026, at 2038, Resident Concern: Officer Orozco responded to a reported harassment complaint involving two residents. The reporting resident stated that another resident approached her minor children while attempting to ask questions about a cat on the property. The reporting resident stated that the other resident subsequently made derogatory comments, threatened to contact Child Protective Services (CPS) regarding her children, and made allegations of animal abuse. She also reported previous incidents involving alleged trespassing and harassment. The reporting resident advised that she intended to file a formal complaint with the Sheriff's Department.
August 13, 2026, at 0030, Pauma School 11.53: Officer Colin found Classroom 7 unsecured during patrol. He checked and cleared the classroom but was unable to secure the door. Officer Colin also found the boys' and girls restrooms unsecured. He checked and cleared both restrooms and was able to secure them. Control 1 to notify the contact.
August 13, 2026, at 0609, North Coast Church 11.53: Officer Colin found room 56 unsecured; Officer Colin cleared and secured the room. Control 1 to notify the contact.
August 13, 2026, at 1710, Animal Call: Officer Meyer was dispatched to Womsi Road regarding a report of an injured or possibly deceased opossum in a resident's yard. The resident reported that the animal was surrounded by flies. Upon arrival, Officer Meyer checked the area but was unable to locate the opossum. It appeared that the animal may have left the area. The resident was advised to contact Control 1 if the animal returned or was located again so Patrol could respond. The resident was also advised that Animal Control would need to be contacted if removal of the animal was necessary.
August 13, 2026, at 1745, Resident Request: A resident requested an escort onto a neighboring property to retrieve an item that had previously been loaned to them. Officer Meyer advised the

resident that Security could not authorize or escort them onto private property without prior approval from the property resident. Control 1 contacted the neighboring resident and facilitated communication between the two parties. The residents were placed in direct contact with each other, and no further Security action was necessary.
August 13, 2026, at 2000, Gate Runner: A grey Honda Accord was observed tailgating through the Front Gate resident entrance. Camera footage was reviewed; however, the footage was unclear and a complete license plate number could not be confirmed. Control 1 and Officer 1L7 conducted further investigation and identified the vehicle through footage from a previous entry. The relevant video footage was emailed to Officers Albert and Easter for review. A Notice of Violation (NOV) was prepared and scheduled for delivery the following morning. No further action was necessary.
August 13, 2026, at 2242, Pauma School 11.53: Officers Meyer and Colin found Rooms 10 and 16 and the girls' bathroom locked but not properly latched. Officers checked and cleared all three areas and secured the doors. Cleaning supplies were also observed outside the girls' bathroom. Room 7 was found unlocked. Officers checked and cleared the room but were unable to secure the door. Control 1 to notify contact.
August 14, 2026, at 1529, Gate Runner: Officer Easter was dispatched to the Back Gate regarding a reported gate runner. A silver/gray Lexus RX350 reportedly gained unauthorized entry by tailgating behind a resident's vehicle through the gate. Officer Easter patrolled the community and located the vehicle at PVCC. The vehicle was documented, and a Notice of Violation (NOV) was issued at 1731 hours. The vehicle information was saved in the BOL file at the Front Gate for future reference.
August 14, 2026, at 2225, Pauma School 11.53: Officer Meyer found doors 7 and 10 locked but not latched. Door 10 was cleared and secured. Door 7 was cleared but unable to be secured. The door seems to be unable to close properly. Control 1 to notify contact.
August 15, 2026, at 1730, Gate Runner: Officer Orozco responded to a report of a possible gate runner. The vehicle was located traveling on Womsi and was observed exiting through the rear gate. Information was logged at the front gate for future contact.
August 16, 2026, at 0804, Medical: Officer Orozco responded to a medical call regarding an individual experiencing dizziness and difficulty standing. Emergency medical personnel arrived on scene, evaluated the individual, and transported one patient to Palomar Hospital for further medical evaluation.
August 16, 2026, at 1718, Resident Report: Officer Orozco was flagged down by a resident regarding a concerning interaction with an unknown individual. The resident reported that an unknown male in a black vehicle had been driving up and down the area. When the resident attempted to offer assistance, the individual pulled alongside her and used foul language. The resident reported feeling afraid and requested that the incident be documented. No additional vehicle or driver information was available.
August 16, 2026, at 2015, Pauma School 11.53: Officer Meyer found the cafeteria door unsecured. He cleared the building but was unable to secure the door. Control 1 notified contact.
August 16, 2026, at 2331, Green Maintenance 11.53: Officer Aguilar found the back gate to Green Maintenance open.
August 17, 2026, at 0221, Pauma School 11.53: Officer Aguilar found the cafeteria door unlocked. He was able to clear the building but was unable to secure the door. Control 1 to notify contact.
August 17, 2026, at 0100, Green Maintenance 11.53: Officer Aguilar found the back gate to Green Maintenance open.
August 18, 2026, at 1210, Dirt Bikes: Dirt Bike / Trespassing: While Officer Easter was assigned to the back gate due to ongoing gate repairs, he observed two juveniles riding dirt bikes toward the gate. Officer Easter contacted the juveniles on Pauma View. One juvenile left the area on his dirt bike, while the second advised that his dirt bike had broken down and requested permission to walk it through the back gate to meet his parent. Officer Easter escorted the juvenile and the dirt bike through the back gate.

and out of the community. Officer Easter then contacted the parent and advised that PVCCE is private property, dirt bikes are not permitted within the community, and unauthorized entry may be considered trespassing. No further action was required.

August 18, 2026, at 1448, Solicitor: Officer Easter was dispatched to Wiskon Way East regarding a report of a possible solicitor representing a pest control company. The individual was reported traveling through the community on a two-wheel Segway. Officer Easter located and contacted the individual at a residence on Wiskon Way West. The individual provided Officer Easter with his business card and the company's office number. The officer contacted the company and advised a representative of the individual's activity within the community and that solicitation is prohibited. It was determined that the pest control company does have existing customers within the community. The individual subsequently left the community without further incident.

August 18, 2026, at 2117, Welfare Check: Officer Aguilar conducted a welfare check after a resident reported concern for a neighbor who was not answering the phone and whose garage door had been left open.

Officer Aguilar contacted the resident, who advised that she had been asleep and had forgotten to close the garage door. The resident was safe, and no further Security action was necessary.

August 18, 2026, at 0104, Green Maintenance 11.53: Officer Aguilar found the back gate to Green Maintenance unlocked.

August 19, 2026, at 0908, Resident Concern: Officer Easter responded to a report of a resident on Luiseno Circle Dr regarding a verbal confrontation that occurred while the resident was walking on Wiskon Way West. The resident reported that a passing driver approached him and began yelling profanities and calling him a racist because the resident did not wave at the driver. The resident became concerned about the driver's behavior and reported the incident to the gate. Officer Easter contacted the reporting resident and obtained a statement and a general description of the vehicle involved. Based on the information available, it is possible that the driver may be a resident within the community. However, due to the limited and uncertain vehicle description, Officer Easter was unable to positively identify if the vehicle observed exiting the front gate was the same vehicle involved in the incident. More investigation into this incident will be conducted, and any additional information obtained will be evaluated to determine whether the involved driver and vehicle can be positively identified.

August 21, 2026, at 1902, Resident Concern: Officer Meyer was dispatched to the Temet Drive pool after a resident reported individuals at the pool who were believed to be non-residents. Officer Meyer checked the pool area and observed no suspicious activity or behavior. No further action was necessary.

August 21, 2026, at 2010, Pauma Building 11.53: Officer Meyer found the women's restroom unsecured. Officer Meyer cleared and secured the building.

August 22, 2026, at 1238, Water Leak: Officer Orozco discovered a water leak at well 31. The leak was reported to RPMWD. The water was turned off.

August 22, 2026, at 1749, Resident Concern: Officer Orozco responded to a report of two individuals on motorcycles performing stunts within the community. Upon arrival, the individuals were observed riding through the area and exiting onto Cole Grade.

August 22, 2026, at 1808, Medical: Officer Meyer was dispatched to Pauma Heights for a lift assist involving a resident who had fallen in the bathroom and was unable to get up without assistance. Cal Fire personnel were on scene and assisted the resident from the floor. No further Security action was necessary.

August 22, 2026, at 2020, Pauma School 11.53: Officer Meyer found a broken hose that was spraying water near the tool sheds on the west side of the school. He was able to shut it off and prevent flooding. Control 1 to notify contact in the morning.

August 22, 2026, at 2125, Greens Maintenance 11.53: Officer Meyer found the back gate wide open.
August 23, 2026, at 1200, Power Outage: Officer Orozco responded to a community-wide power outage. Backup generators were checked and confirmed to be operating properly. Community gates and front gate equipment were also checked and found to be functioning properly. Appropriate supervisor and utility personnel were notified.
August 23, 2026, at 1640, Power Outage: Officer Orozco responded to a reported power outage. All community backup generators and gate systems were checked and confirmed to be operating properly.
August 23, 2026, at 1647, Pauma School 459 Alarm: Officer Orozco responded to a school alarm activation. The area was checked, and no signs of forced entry or suspicious activity were found. Control 1 to notify the contact
August 23, 2026, at 1905, North Coast Church 11.53: Officer Meyer found the double doors in the breezeway open. He cleared and secured the building. Control 1 to notify contact in the morning.
August 23, 2026, at 2045, Pauma Village 11.53: Officer Meyer found a homeless man sleeping at the table in front of the building. The officer explained that he was on private property and was unable to stay on site. The man then started walking down Highway 76.
August 23, 2026, at 2057, Oak Tree: During a power outage, Officer Meyer checked the Oak Tree lift station to make sure the generator was still running. He found the generator had shut off and attempted to restart it. The utility on-call number was contacted, and he was dispatched to assess the problem and fix the generator.
August 23, 2026, at 2127, Medical/Fire Response: Officer Meyer was dispatched to Luiseno Circle Drive regarding an activated smoke/CO alarm. Upon arrival, as a safety precaution, Officer Meyer advised the residents to remain outside while Control 1 contacted the fire department. Fire personnel arrived and detected an elevated carbon monoxide (CO) reading inside the residence. Fire personnel checked the residence but were unable to identify the source. The residence was ventilated by opening the doors and windows, and subsequent CO readings returned to normal levels. Officer Gonzalez relieved Officer Meyer and remained on scene until fire personnel completed their response. No further Security action was necessary.
August 24, 2026, at 1003, Verify Guest: Officer Orozco responded to a gate request to assist a driver attempting to enter the community. The individual was verified as a delivery driver and was allowed access.
August 24, 2026, at 1036, Loose Dog: Officer Orozco responded to a report of a loose dog. The dog was located, and the owner retrieved the animal. No further action required
August 25, 2026, at 0107, Green Maintenance 11.53: Officer Aguilar found the back gate to Green Maintenance wide open.
August 25, 2026, at 0155, Oak Tree Water Leak: Officer Aguilar found a water leak in front of Oak Tree by the gate spilling a significant amount of water. Officer Aguilar let control one knows to notify the Oak Tree contact. The contact at Oak Tree did not answer the phone; Control 1 left a voicemail about the water leak.
August 25, 2026, at 1353, Medical: Officer Easter was dispatched to Taupa Way for a medical emergency. All responding units arrived on scene. The resident's son reported that his father had lost color and was feeling dizzy and confused. 911 was contacted, and the individual was later transported by medical personnel for further evaluation.
August 26, 2026, at 1040, Loose Dog: The PVCC reported that an orange dog was found at the golf shop. Officer Easter contacted the owner of the dog, and the dog was retrieved.
August 26, 2026, at 1347, Jump Start: Officer Easter was requested for a jump-start on Paauwe Dr. The vehicle was successfully jump-started.

August 26, 2026, at 1825, Suspicious Activity: Officer Orozco responded to a report of a suspicious individual around the CSD building. The area was patrolled, and no signs of suspicious activity were found. Contact was made with an individual who was identified as a guest at a nearby hangar and was attempting to locate a restroom.
August 26, 2026, at 1912, Gravel Yard 11.53: Officer Orozco discovered the reservoir gate open during patrol. The area was checked, and the gate was secured. Wells were also checked and confirmed secure.
August 26, 2006, at 1934, Green Maintenance 11.53: Officer Orozco discovered the green maintenance gate open and unsecured during routine patrol. Control 1 to notify the contact.
August 26, 2026, at 2048, Alarm Activation: Officer Orozco responded to a CO alarm activation and assisted Cal-Fire with checking the residence. No readings were detected, and it was thought to be the result of a malfunctioning CO detector. The resident advised that an electrician would be contacted to inspect the alarm system.
August 28, 2026, at 1557, Resident Concern: A resident stopped at the front gate concerned about another resident driving her golf cart outside the community to the market across the street. Control 1 was notified of the situation.
August 28, 2026, at 1612, Welfare Check: A Sheriff's deputy stopped inside the community for a welfare check on Luiseno Circle Dr. The Deputy contacted the resident and informed her that it was reported she was driving her golf cart across the street to the market. Deputy only advised her that it was not safe and, if possible, not to drive across the street.
August 27, 2026, at 2140, North Coast Church: Officer Meyer found the front double doors locked but not latched, the breezeway double doors unlocked, and the storage room door under the stairs unlocked. He was able to clear and secure all doors. Control 1 to notify contact in the morning.
August 28, 2026, at 1950, Pauma Building: Officer Meyer found the women's restroom locked but not latched. He was able to clear and secure the building. Control 1 to notify contact in the morning.
August 28, 2026, at 2245, Green Maintenance 11.53: Officer Gonzalez found the back gate to Green Maintenance open.
August 29, 2026, at 0008, Pauma Village: Officer Gonzalez found both locks to the ice storage unit unsecured. He was able to secure both locks. Control 1 to notify contact in the morning.
August 29, 2026, at 1324, Resident Concern: Officer Orozco responded to a resident concern regarding trash burning. The area was patrolled, and no signs of smoke or burning activity were observed. The area was monitored throughout the evening during routine patrols.
August 29, 2026, at 1440, Office Request: Officer Orozco responded to the Treatment Plant to check the operation of the blowers. Both blowers were found off, and the appropriate contact was notified.
August 29, 2026, at 1732, Verify Guest: Officer Orozco responded to a guest entry request for a community event. Contact was made with the host, who verified and authorized the guest's entry.
August 30, 2026, at 0018, Suspicious Activity: Officer Aguilar was requested to check the area around two residences on Luiseno Circle Drive for possible suspicious activity. Officer Aguilar conducted exterior checks of both properties and the surrounding area. No suspicious persons, activity, or other issues were observed. The residents were notified that the area was clear. No further action was necessary.
August 31, 2026, at 0558, Suspicious Activity: A resident requested patrol assistance due to a suspected person smoking a cigarette outside the residence. Officer Aguilar conducted an exterior check of the property and found no signs of anyone present or any smell of cigarette smoke. No suspicious activity was observed.
August 31, 2026, at 1603, Water Leak: Resident Concern: Officer Orozco responded to a report of a water leak at a residence. Upon arrival, Officer Orozco located the leak near the front door. Attempts to

contact the resident were unsuccessful. Control 1 was advised to notify the resident of the leak. It was reported that a technician would respond the following day to address the issue.
September 1, 2026, at 1030, Follow Up: Officer Easter followed up with a resident regarding an incident that occurred on August 19. During the incident, another resident was walking in the community when a vehicle possibly matching the resident's son's vehicle drove by, and the driver reportedly yelled and used inappropriate language toward the individual. Officer Easter informed the resident that Security wanted to follow up to help maintain a safe community and prevent similar incidents from occurring in the future. The resident stated that he believed it may have been his son and that he would speak with him regarding the incident. The follow-up was documented.
September 1, 2026, at 1238, Resident report: Officer Easter was approached by a resident on Luiseno who reported that she believed her vehicle may have been taken by another resident without her permission. Officer Easter advised the resident that the Sheriff's Department could be contacted regarding the matter; however, she declined. The resident stated that the vehicle may be registered under the other resident's name. She did not want any action taken by Security and only requested that the incident be documented.
September 2, 2026, at 1510, Snake Call: Officer Easter was dispatched for a snake on Tukwut Ct. The snake was removed.
September 2, 2026, at 2123, Resident Request: Officer Orozco responded to a request to maintain peace during a child pickup. The exchange was completed without incident.
September 4, 2026, at 1035, PVCC Report: A PVCC member reported that a resident became upset with an employee after requesting a ride to the Front Gate and being advised that the employee was unable to provide transportation. The resident reportedly began yelling and using profanity toward the employee. Officer Easter contacted the resident at the Front Gate and advised that yelling, using profanity, or directing inappropriate language toward employees or others was unacceptable. The resident was advised to refrain from this type of behavior in the future. The incident was documented. No further action was necessary.
September 4, 2026, at 1100, Property Damage Report: The General Manager of Temco Logistics reported that one of their employees may have contacted the Pauma Valley Country Club rock wall near the back gate while backing up yesterday. The General Manager provided the employee's information, including a phone number and email address, and requested that the information be forwarded to the Country Club. Officer Easter contacted the General Manager of PVCC and informed him of the reported incident. All information regarding the incident was documented.
September 4, 2026, at 1307, Medical: Officer Easter was dispatched to Luiseno for a lift assist. Upon arrival, Officer Easter contacted the resident, who was sitting on his own. The resident stated that he had fallen in the bathroom and had a scratch on his arm that was bleeding. He also stated that he had hit the back of his head during the fall. Officer Easter contacted Control 1 and requested 911. Cal Fire and Mercy Medics arrived on scene and evaluated the resident. Officer Easter cared for the resident's wound. The resident was transported to Palomar Hospital for further evaluation.
September 4, 2026, at 1908, Treatment Plant 11.53: Officer Meyer found the 2002 lock unlocked at the entrance gate. He cleared and secured the area. Control 1 notified.
September 4, 2026, at 2103, Green Maintenance 11.53: Officer Meyer found the back gate left open.
September 5, 2026, at 0238, Alarm: Officers Meyer and Gonzalez were dispatched to North Coast Church for an alarm. They searched the perimeter and found nothing out of the ordinary. All doors were secured.
September 5, 2026, at 1215, Medical: Officer Orozco observed a medical helicopter landing at Temple Fields while conducting a building check. Cal-Fire and medical personnel were on scene, and the gate was already open.

September 5, 2026, at 1546, Gate Runner: Officer Orozco responded to a report of an individual tailgating into the community. The individual was located outside of the community, and no further action was necessary.
September 5, 2026, at 1600, Property Damage: Officer Orozco responded to a report of a vehicle that had driven on the golf course. The damaged area was located. Photos were taken, and the incident was documented.
September 6, 2026, at 0113 Green Maintenance 11.53: Officer Aguilar found the back gate to Green Maintenance wide open.
September 6, 2026, at 1546 Snake Call: Officer Orozco responded to a snake call request. The snake was located and removed.
September 6, 2026, at 0116, Green Maintenance 11.53: Officer Aguilar found the back gate to Green Maintenance wide open.
September 7, 2026, at 1804, Snake Call: Officer Aguilar responded to a snake call request from Pauma Village. The snake was located and removed.
September 7, 2026, at 2004, Suspicious Activity: A resident on Wiskon Way East reported observing a vehicle driving on the golf course near Hole 6 and the Gravel Yard. Officer Aguilar responded and conducted a check of the area. Officer Aguilar did not locate any vehicles on the golf course and observed no tire marks or other signs indicating that a vehicle had driven on the course.
September 7, 2026, at 2124 11.53 Pauma School: Officer Aguilar found the back door to the cafeteria left unlocked. He was able to clear the building but was unable to secure the door. Control 1 to notify contact.
September 8, 2026, at 0050, Fire Alarm: A fire alarm notification was received on Wiskon Way East from the Pulse Point app. Officer Aguilar and Officer Colin responded to the alarm. When arriving, contact was made with the resident, who confirmed there was no fire. Water was leaking onto the bedroom fire alarm, causing it to be activated. Fire personnel were notified and conducted a thorough check of the residence. The alarm was determined to be a false alarm.
September 10, 2026, at 1009, Loose Dog: A resident on Womsi Rd reported an orange/brown dog running on the golf course. The owner was contacted, and the dog was retrieved.
September 10, 2026, at 1206, Suspicious Activity: A guest reported seeing a suspicious individual near the gate on PVD wearing a gas mask and holding a box. No other description was given. Officer Easter patrolled the community but was unable to find the individual.
September 10, 2026, at 2035, Pauma Building 11.53: Officer Meyer found doors 100, 103, and Residential Commercial unlocked. He cleared and secured the building. Control 1 to notify contact in the morning.
September 10, 2026, at 2117, Greens Maintenance 11.53: Officer Meyer found the back gate left open.

RFID Entries						
Front Gate			Center Gate		Back Gate	
14,019			1,944		13,529	
Dispatch By Location						
Inside PVCCE	Oak Tree	School	Business Dist.	St. Francis	PVCC	Hwy 76
34		15	7			
Highlights by Shift Periods						
A: 2200-0600			B: 0600-1400		C: 1400-2200	
37			17		35	

PVCSD Patrol – Building Checks				
Location	Unsecured Door	Fire Alarm	Burglary Alarm	Officer Check
			459A	1153
Country Club (CC)				
Greens Maintenance (GM)	29			3
Community Church (CO)	3		1	69
Gravel Yard (GY)				75
Saint Francis (SF)				86
Pauma School (PS)	17		1	42
Pauma Building (PB)	2			60
Airport Hangars (AH)				66
Treatment Plant (TP)				63
Pauma Village (PV)	1			44
Residential Houses/Other	8			

Patrol Activity				Gate Activity	
Medicals	4	Resident Concern	13	Activity/Malfunctions	Totals
Welfare Checks	2	Suspicious Activity		Unresponsive	1
Lift Assist	1	Noise Complaint		Will Not Close	Continuous
Domestic Dispute		Process Server		False Read	0

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Office Manager

Department:	Administration
Reports to:	General Manager
Supervises:	Administrative support staff, as assigned
Salary Range:	Per the District's current adopted salary schedule
Location:	Pauma Valley Community Services District (PVCSD) 33129 Cole Grade Road, Pauma Valley, CA 92061

Pauma Valley Community Services District (PVCSD) Overview

The Pauma Valley Community Services District (PVCSD) is a public agency established under California Government Code to provide essential utility and security services to the residents of Pauma Valley Country Club Estates and surrounding areas. As a special district, PVCSD operates independently to ensure reliable wastewater management, storm drain maintenance, and community security, promoting public health, safety, environmental protection, regulatory compliance, and responsive service delivery.

Position Summary

Under the direction of the General Manager, plans, coordinates, and performs the District's principal administrative and Board support functions. The Office Manager is responsible for Board and records administration, executive support, payroll and CalPERS coordination, human resources and benefits administration, financial and audit support, regulatory reporting coordination, public communications, and day-to-day office operations; handles confidential and sensitive information; exercises substantial independent judgment; and performs related work as assigned.

Distinguishing Characteristics

This is a senior administrative classification serving a small, multi-service special district. The incumbent works with considerable independence and is entrusted with recurring statutory deadlines and sensitive workflows that directly support District governance, payroll, personnel administration, public transparency, and financial accountability. The position serves as the District's Board Secretary and custodian or coordinator of official administrative records and may provide day-to-day work direction, training, and quality review to assigned administrative support staff.

Essential Functions

Board Governance & Legal Compliance (Primary Focus)

- Coordinate preparation and distribution of Board agendas, staff reports, supporting materials, and complete agenda packets; verify formatting, completeness, deadlines, and required public access.
- Attend regular and special Board meetings, including evening meetings; record proceedings and prepare accurate, impartial minutes, resolutions, ordinances, and records of official actions for review and approval.
- Support compliance with the Ralph M. Brown Act, District policy, and applicable notice and posting requirements; post agendas, public notices, resolutions, ordinances, and other official communications.
- Maintain official Board and District records, including minutes, ordinances, resolutions, policies, agreements, and related indexes; coordinate signatures, certifications, document execution, and retention.
- Assist with Public Records Act requests by receiving and tracking requests, coordinating record searches and review, maintaining response deadlines, and preparing responsive records under direction of the General Manager or legal counsel.
- Support election and governance administration, including candidate filing materials, oaths of office, Board training requirements, and conflict-of-interest and Form 700 filing coordination, as assigned.
- Draft Board letters, notices, correspondence, and other official documents; review materials prepared by the General Manager and staff for clarity, consistency, completeness, and administrative accuracy.

Executive Support & Office Management

- Provide high-level administrative support to the General Manager and Board of Directors; manage calendars, deadlines, meeting logistics, correspondence, research, and follow-up assignments.

- Plan and coordinate daily administrative office operations and customer service; develop and maintain procedures, forms, calendars, filing systems, and administrative controls.
- Serve as a primary point of contact for residents, customers, vendors, partner agencies, and the public; respond professionally, research issues, resolve routine matters, and route sensitive or technical issues appropriately.
- Coordinate office purchasing, inventory, records storage, meeting arrangements, equipment, and vendor services; assist with contracts, insurance documents, and certificates as assigned.
- Provide work direction, training, quality review, and coverage coordination for assigned administrative support staff, temporary employees, or interns.
- Provide notarial services for authorized District business when commissioned.

Payroll, Human Resources & Benefits Administration

- Administer biweekly payroll and timekeeping; review time records, schedules, pay changes, deductions, leave use, overtime, and supporting documentation for accuracy and authorization.
- Prepare and reconcile payroll reports and journal entries; coordinate CalPERS payroll reporting, enrollment, separation, and related compliance activities.
- Coordinate recruitment and hiring administration, including job postings, applicant communications, interview materials, reference and background processes, offer documentation, onboarding, and separation checklists.
- Administer employee benefits and annual open enrollment; process enrollments and changes, coordinate with employees and providers, and reconcile benefit deductions and invoices.
- Maintain confidential personnel, payroll, benefit, training, and medical records in accordance with recordkeeping and access requirements.
- Track probationary periods, evaluations, licenses, certifications, required training, leave balances, and other personnel deadlines; prepare routine notices and reports.
- Assist the General Manager with personnel policies, salary schedules, classification materials, employee communications, and other human resources projects.

Financial, Budget & Audit Support

- Perform or oversee routine accounts payable, accounts receivable, customer invoicing, cash receipt, and purchasing support.
- Prepare financial and administrative schedules, reconciliations, reports, and supporting records for management review; process authorized journal entries and maintain audit trails.
- Coordinate administrative support for annual budget development, interim and year-end audits, and requests from the District's CPA, auditors, Treasurer, and other financial partners.
- Maintain vendor records, agreements, insurance documentation, and payment support; assist with positive pay and banking documentation.
- Monitor administrative expenditures and contracts, identify discrepancies or deadlines, and promptly elevate material issues.

Records, Regulatory Reporting & Public Communications

- Serve as custodian or designated coordinator of District administrative records; and maintain organized, searchable electronic and paper files.
- Coordinate recurring reports and filings with state, county, and regulatory agencies, including State Controller reporting and other District compliance submissions.
- Track operational and environmental reporting calendars and coordinate supporting information with responsible staff or consultants, including air quality, no-spill, self-monitoring, trucked-waste, and sewer-system-management requirements, as applicable.
- Maintain and update the District website, including agendas, minutes, financial information, public notices, policies, and transparency materials; support accessibility and legally required online postings.
- Draft clear customer notices, rate or service communications, website updates, and public information; coordinate distribution through appropriate channels.
- Maintain the District's master compliance calendar and proactively notify responsible parties of upcoming deadlines, required approvals, and missing documentation.

General Duties

- Protect confidential and privileged information and exercise discretion in personnel, legal, financial, and Board matters.
- Establish effective working relationships with elected officials, coworkers, consultants, regulators, customers, vendors, and members of the public.
- Remain current on laws, regulations, technology, and professional practices relevant to assigned responsibilities; attend training and professional meetings as approved.
- Provide backup administrative support during absences or emergencies and perform all other related duties as assigned by the General Manager.

Minimum Qualifications, Required Education & Experience

High school diploma or GED equivalent. College-level coursework or an associate degree in public administration, business administration, accounting, human resources, records management, or a related field is desirable.

Five (5) years of progressively responsible administrative, executive support, records, payroll, human resources, or financial-support experience, including at least two (2) years supporting a public agency, governing board, or similarly regulated organization; or an equivalent combination of education, training, and experience.

Experience independently coordinating several of the position's major functional areas and managing confidential records and recurring compliance deadlines.

Required Licenses/Certifications (at hire or within stated timeframe)

Valid California Class C driver's license with a satisfactory driving record and insurability under District policy, if required to operate a District vehicle or conduct District business.

California Notary Public commission - desirable at hire; must obtain within twelve (12) months if designated as a requirement by the General Manager.

Completion of legally required public-agency training and District-assigned payroll, CalPERS, records, ethics, harassment-prevention, emergency management, and cybersecurity training within established timeframes.

Preferred/Desired Qualifications

Certified Board Secretary/Clerk credential through the California Special Districts Association (CSDA)

Direct experience with a California special district, city, county, water or wastewater agency, or other local government.

Hands-on experience with Brown Act agendas and minutes, Public Records Act coordination, CalPERS reporting, payroll administration, annual audits, and public-agency records retention.

Experience with ADP Workforce Now or a comparable payroll/timekeeping platform; QuickBooks or comparable accounting software; and Streamline or another government website platform.

Bilingual English/Spanish communication skills.

Knowledge, Skills & Abilities

- **Board Governance & Public Records:** Knowledge of public-agency Board and meeting administration, including Brown Act procedures, agenda preparation, minute taking, official records, public notices, records retention, Public Records Act concepts, transparency, and confidentiality requirements.
- **Payroll, HR & Benefits:** Knowledge of payroll and timekeeping practices, CalPERS reporting concepts, employee onboarding and separation, benefit administration, personnel records, required training, and confidentiality safeguards.

- **Financial & Audit Support:** Knowledge of basic governmental accounting, accounts payable and receivable, purchasing, budgeting, audits, reconciliations, journal entries, documentation standards, and internal controls.
- **Office & Records Management:** Skill in executive support, customer service, deadline control, filing systems, records management, proofreading, research, report preparation, and professional correspondence.
- **Analytical Judgment:** Ability to interpret and apply laws, policies, procedures, contracts, and reporting instructions; identify inconsistencies; reconcile records; recognize when legal, financial, technical, or management review is needed; and make sound decisions under deadline pressure.
- **Communication & Neutrality:** Ability to communicate clearly and tactfully with elected officials, employees, consultants, regulators, customers, and the public; prepare accurate and impartial minutes; maintain neutrality in Board matters; and protect sensitive information.
- **Technology:** Proficiency with Microsoft 365, payroll/timekeeping platforms, accounting software, website content-management platforms, PDF tools, spreadsheets, and electronic records systems; ability to learn specialized District applications.
- **Organization:** Ability to manage multiple complex workstreams, frequent interruptions, statutory deadlines, and changing priorities with limited supervision while maintaining accuracy and appropriate follow-through.

Working Conditions & Physical Requirements

- Works primarily in a standard office environment with frequent interruptions, public contact, confidential matters, and firm statutory, payroll, and meeting deadlines.
- Frequently sits for extended periods and uses a computer, keyboard, telephone, and standard office equipment; requires visual acuity to review detailed records and hearing and speech sufficient for effective communication.
- Occasionally stands, walks, bends, reaches, and lifts or carries files, supplies, or equipment weighing up to 25 pounds; may travel locally for banking, postings, meetings, training, or other District business.
- Must be able to attend evening Board meetings and occasionally adjust the work schedule to meet payroll, legal, audit, emergency, or operational deadlines. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.

Special Requirements

- Successful completion of a background check, reference review, and any other job-related screenings required by the District.
- Ability to maintain the highest level of confidentiality and discretion regarding personnel, payroll, legal, financial, closed-session, and other sensitive District matters.
- Ability to work varying hours, including evenings and occasional overtime, when required for Board meetings, payroll processing, public notices, audits, elections, emergencies, or statutory deadlines.
- Compliance with all District policies, including requirements applicable to disaster service workers under California Government Code Section 3100.
- All other duties and responsibilities as required by the General Manager.

Equal Employment Opportunity

The Pauma Valley Community Services District (PVCSD) is an equal opportunity employer and prohibits discrimination and harassment of any kind. PVCSD is committed to the principle of equal employment opportunity for all employees and to providing employees with a work environment free of discrimination and harassment. All employment decisions at PVCSD are based on business needs, job requirements, and individual qualifications, without regard to any status protected by applicable federal or California law. PVCSD encourages applicants of all ages, backgrounds, and experiences to apply. If you need reasonable accommodation during the application or interview process, please contact the District office at (760) 742-1909 or customerservice@paumavalleycsd.ca.gov.

Administrative Services Supervisor

Department:	Administration
Reports to:	General Manager
Supervises:	Administrative Assistant; Office Clerk (Part-Time); temporary staff, interns, consultants or contractors as assigned
Salary Range:	Per the District's current adopted salary schedule
Location:	Pauma Valley Community Services District (PVCSD) 33129 Cole Grade Road, Pauma Valley, CA 92061

Pauma Valley Community Services District (PVCSD) Overview

The Pauma Valley Community Services District (PVCSD) is a public agency established under California Government Code to provide essential utility and security services to the residents of Pauma Valley Country Club Estates and surrounding areas. As a special district, PVCSD operates independently to ensure reliable wastewater management, storm drain maintenance, and community security, promoting public health, safety, environmental protection, regulatory compliance, and responsive service delivery.

Position Summary

Under the direction of the General Manager, plans, supervises, coordinates, and personally performs the District's administrative services functions. The Administrative Services Supervisor serves as Clerk of the Board and official custodian of all District records and files, including employment records; serves as the District's Human Resources lead and the first point of contact for employee grievances; performs and oversees District bookkeeping, accounts payable and receivable, customer billing, payroll processing, and CalPERS reporting and compliance; administers benefits and insurance programs; monitors compliance deadlines and changes in law and ensures compliance items are completed on time; supervises assigned administrative staff and maintains consistent office coverage; screens and resolves routine matters before they reach the General Manager; coordinates meetings, contractors, and consultants on administrative matters; maintains the District website, administrative calendar, and document quality control; supports procurement; handles confidential and sensitive information; exercises independent judgment within established policy; and performs all other duties as required by the General Manager.

Distinguishing Characteristics

This is a working supervisory classification and the senior administrative position in the District below the General Manager. The incumbent is the General Manager's primary delegate for administrative, financial recordkeeping, personnel, and compliance workflows and is accountable for recurring statutory deadlines that directly support District governance, financial integrity, public transparency, and employee administration.

The position is distinguished from the Administrative Assistant by its supervisory responsibility, its designation as Clerk of the Board, records custodian, and Human Resources lead, its accountability for financial and regulatory deadlines, and the breadth of independent judgment exercised. It is distinguished from the General Manager, who retains executive authority over policy, personnel actions, finance, contracts, and Board relations; the Administrative Services Supervisor executes, coordinates, and recommends within delegated authority. The position is a peer of the General Services Supervisor and works indirectly with the General Services Supervisor, the Security Services Lead, contractors, and consultants to coordinate administrative, financial, and compliance matters that span District divisions.

The classification carries a high standard of initiative and accuracy. The incumbent is expected to identify and assume work that can be handled at the Supervisor level in order to preserve the General Manager's capacity for executive matters, to bring recommended solutions when elevating problems, and to produce work that the Board, auditors, regulators, and employees can rely on without re-verification.

Essential Functions

The following duties are typical for this classification. They are intended to describe the general nature and level of work performed and are not an exhaustive list of all duties, responsibilities, and skills required. The General Manager may assign

other duties, projects, and responsibilities at any time, whether or not specifically listed, consistent with the general purpose of the classification.

Clerk of the Board & Governance Support (Primary Focus)

- Serve as Clerk of the Board: prepare, assemble, and distribute agendas, staff reports, resolutions, ordinances, and complete agenda packets for regular, special, and committee meetings; verify formatting, completeness, deadlines, and public access; post agendas and notices within the timeframes required by the Ralph M. Brown Act and District policy.
- Attend regular and special Board meetings, including evening meetings; record proceedings; prepare accurate, impartial minutes and records of official actions; maintain the official record of motions, votes, direction to staff, and follow-up items.
- Draft Board letters, staff reports, resolutions, ordinances, notices, proclamations, and official correspondence at the direction of the General Manager; edit and finalize materials prepared by the General Manager, staff, and consultants for accuracy, consistency, and completeness.
- Maintain official Board and District records, including minutes, ordinances, resolutions, policies, agreements, and related indexes; coordinate signatures, certifications, recording, document execution, and retention; certify copies of official records.
- Receive, log, track, and coordinate responses to Public Records Act requests; coordinate record searches and review; maintain response deadlines; prepare responsive records under direction of the General Manager or legal counsel.
- Support governance and election administration, including candidate filing coordination with the County Registrar of Voters, oaths of office, director onboarding and orientation, Board training requirements (ethics and harassment prevention), and conflict-of-interest code and Statement of Economic Interests (Form 700) filing coordination; serve as the District's filing officer when designated.
- Coordinate public hearing notices, ordinance and resolution publication, and legally required postings and publications; maintain proof-of-posting and proof-of-publication records.
- Coordinate Board member travel, training registrations, reimbursements, and compensation documentation in accordance with District policy.
- Maintain the District's policy manual, employee handbook, ordinance and resolution files, and other governing documents in current form; incorporate adopted amendments and maintain version control.

Financial Administration, Bookkeeping, Billing & Audit Support

- Serve as the District's bookkeeper: perform and oversee accounts payable, accounts receivable, customer invoicing and billing, cash receipts and deposits, purchasing card reconciliation, and general ledger entries in the District's accounting system (currently QuickBooks Online); maintain audit trails and supporting documentation.
- Process, review, and code invoices; verify authorization, budget availability, contract compliance, and receipt of goods or services; prepare warrant and payment registers for General Manager review and Board approval.
- Prepare bank reconciliations, financial schedules, and monthly and quarterly financial reports for management and Board review; monitor cash balances, reserves, and investment reporting; assist with positive pay and banking documentation.
- Administer customer accounts, including sewer service charges, security and gate access charges, and miscellaneous receivables; coordinate the annual submittal of charges to the County property tax roll, as applicable; research and resolve billing discrepancies and delinquencies.
- Coordinate administrative support for annual budget development, mid-year budget review, interim and year-end audits, the District's financial consultants, the independent auditor, and the Treasurer; assemble audit schedules and respond to auditor requests.
- Prepare and submit recurring financial filings, including State Controller's Office Financial Transactions and Government Compensation in California reports, Form 1099 and related vendor reporting, and other required financial submissions.
- Maintain vendor records, W-9 forms, agreements, insurance documentation, and payment support; monitor administrative expenditures and contracts; identify discrepancies or deadlines and promptly elevate material issues.
- Assist with rate and fee administration, Proposition 218 notice logistics, cost recovery and deposit tracking for developer and third-party accounts, and grant or reimbursement documentation.

- Assist the General Manager with accounting research, analysis, and special financial projects as assigned.

Human Resources, Payroll, CalPERS & Personnel Records

- Serve as the District's Human Resources lead under General Manager direction: the first point of contact for employees regarding grievances, complaints, workplace concerns, personnel policies, benefits, leave, and timekeeping. Receive, document, and acknowledge grievances and complaints; route them in accordance with the District's grievance and complaint procedures; coordinate investigations with the General Manager and legal counsel; maintain grievance files. Nothing in this designation limits an employee's ability to report concerns directly to the General Manager or as otherwise provided by law.
- Process biweekly payroll and timekeeping through the District's payroll platform (currently ADP) in coordination with the District's financial consultants; review time records, schedules, pay changes, deductions, leave use, overtime, and out-of-class assignments for accuracy and authorization; reconcile payroll reports and journal entries; ensure payroll is issued on time and in compliance with state and federal wage, hour, tax, and reporting requirements.
- Monitor each payroll cycle from timekeeping through funding; prepare payroll registers and summary reports for General Manager review and approval before each payroll is released; maintain records of approval; promptly report and correct discrepancies.
- Ensure accurate and timely CalPERS reporting and compliance, including payroll reporting, contributions, enrollments, separations, membership eligibility, and reportable-compensation requirements; verify that pay rates reported to CalPERS conform to the District's adopted salary schedule; coordinate new-hire reporting and other required employer filings; respond to CalPERS inquiries and audits.
- Coordinate recruitment and hiring administration: draft and post job announcements, screen applications against minimum qualifications, schedule and participate in interview panels, coordinate reference and background processes, prepare offer documentation, and conduct onboarding and separation processing.
- Oversee the District's employee benefit programs, including medical, dental, vision, life, retirement, and other benefits, and annual open enrollment; process enrollments and changes; coordinate with providers and CalPERS; reconcile benefit deductions and invoices; ensure benefit plans are maintained in force, renewed on time, and administered in compliance with plan documents and state and federal requirements; coordinate workers' compensation reporting and protected-leave administration with the General Manager and consultants.
- Serve as custodian of confidential employment records, including personnel, payroll, benefit, training, medical, and disciplinary files; maintain records in accordance with recordkeeping, retention, confidentiality, and access requirements.
- Track probationary periods, performance evaluation due dates, licenses, certifications, required training (ethics, harassment prevention, safety, cybersecurity), leave balances, and other personnel deadlines; prepare routine notices and reports for the General Manager.
- Assist the General Manager with personnel policies, salary schedules, classification and compensation materials, employee communications, investigation logistics, and other human resources projects; administer the DMV Employer Pull Notice program and driver records, as assigned.

Records Management, Regulatory Reporting & Compliance Coordination

- Serve as the District's official custodian of records for all District files, in all formats; maintain organized, searchable electronic and paper filing systems; administer the District's records retention schedule, including scheduled destruction with required approvals.
- Maintain the District's master compliance calendar; track permit renewals, reporting deadlines, fee payments, certifications, and training requirements; provide the General Manager with advance notice of upcoming compliance deadlines; proactively notify responsible parties of required approvals and missing documentation; ensure coordination and completion of all compliance items by their deadlines.
- Monitor changes in California and federal law affecting the District's administrative, personnel, financial, and governance functions, including the Brown Act, the Public Records Act, the Political Reform Act, employment and wage-and-hour law, and CalPERS requirements, through legal counsel updates, the California Special Districts Association, and other professional sources; brief the General Manager on changes and recommend updates to District policies, procedures, and forms.

- Coordinate and submit recurring reports and filings to state, county, and regulatory agencies, including the State and Regional Water Quality Control Boards, the San Diego County Air Pollution Control District, CAL FIRE, the Local Agency Formation Commission, the County of San Diego, and the State Controller's Office.
- Serve as a Data Submitter in the State Water Resources Control Board's California Integrated Water Quality System (CIWQS) in support of the District's Legally Responsible Official; enter and maintain required data, certifications, and enrollment information; coordinate with the General Services Supervisor on sanitary sewer system reporting, Sewer System Management Plan administration, and related submittals.
- Track operational and environmental reporting calendars and coordinate supporting information with responsible staff or consultants, including air quality permits, no-spill and self-monitoring reports, trucked-waste documentation, and sewer system management requirements.
- Coordinate CAL FIRE, County, and other inspection and permitting requirements affecting District facilities, including scheduling, documentation, and corrective-action tracking with the General Services Supervisor.
- Assist with development of administrative policies, procedures, forms, and internal controls; document workflows and maintain desk procedures for all administrative functions so that coverage can be sustained during absences.

Insurance, Risk & Contract Administration

- Oversee the District's property, liability, auto, workers' compensation, and other insurance programs; coordinate renewals, applications, exposure schedules, and premium payments; ensure all policies are maintained in force, renewed before expiration, and administered in compliance with policy terms and the requirements of the District's insurance pool or carriers; maintain policies, endorsements, and coverage documentation.
- Report and document claims, incidents, and losses; coordinate with the District's insurance pool or carriers, legal counsel, and staff; maintain claim files and track resolution.
- Maintain the District's contract register; track contract terms, expirations, renewals, insurance requirements, and notice deadlines; obtain and verify certificates of insurance, additional insured endorsements, W-9 forms, and licensing documentation from contractors and consultants before payment release.
- Assist the General Manager with Requests for Proposals and Requests for Qualifications: format and distribute solicitations, manage postings and addenda, receive and log submittals, coordinate evaluation logistics, prepare award documentation, and maintain procurement files.
- Prepare, route, and track contracts, agreements, amendments, and purchase orders for execution; maintain executed originals and monitor compliance with District purchasing policies.

Office Supervision, Coverage & Customer Service

- Plan, assign, supervise, and review the work of the Administrative Assistant, the Office Clerk, and other assigned staff; train staff, set performance expectations, conduct performance evaluations, recommend personnel actions, and address performance and conduct issues in coordination with the General Manager.
- Maintain consistent office coverage during posted business hours through scheduling of the incumbent and subordinate staff; personally cover the front counter, telephones, and customer service functions when needed.
- Serve as the primary point of contact for residents, customers, vendors, partner agencies, and the public; receive, log, research, and resolve customer inquiries, complaints, billing disputes, and service issues; route security and utility matters to the General Services Supervisor or Security Services Lead; track issues to closure and report unresolved matters to the General Manager.
- Provide first-level conflict resolution for customer disputes and workplace concerns; document incidents and outcomes; escalate matters requiring General Manager or legal counsel involvement.
- Coordinate office purchasing, supplies, inventory, equipment, mail, records storage, meeting arrangements, and vendor services; coordinate with the District's information technology contractors on user accounts, equipment, and support requests.
- Provide notarial services for authorized District business when commissioned.
- Delegate and track subordinate tasks; maintain task lists and status reporting for the General Manager.

Executive Support, Calendar & Project Coordination

- Screen and vet incoming calls, visitors, meeting requests, vendor and sales solicitations, and correspondence directed to the General Manager; resolve routine matters, including vendor inquiries and minor resident complaints, directly

or through subordinate staff; refer to the General Manager only those matters requiring executive attention or decision, with a summary of the issue and recommended disposition.

- Maintain the administrative calendar for the General Manager, including meetings, deadlines, Board meetings, office projects, General Manager-assigned projects, compliance deadlines, and delegated subordinate tasks; prepare briefing materials and follow-up assignments.
- Schedule and coordinate meetings and calls among the General Manager, staff, consultants, contractors, and outside agencies; confirm participants, prepare agendas and materials, record action items, and track follow-up to completion.
- Serve as the office's point of coordination with the District's administrative and operations contractors and consultants, including financial, information technology, legal, engineering, and compliance consultants, on office and administrative matters and on other matters as assigned by the General Manager; track deliverables, invoices, and follow-up.
- Assist the General Manager with Board letters and staff reports, special projects, research and analysis, accounting matters, procurement solicitations, website management, and other assignments; manage correspondence and follow-up for the General Manager and Board of Directors.
- Coordinate the administrative components of District projects and initiatives with the General Services Supervisor, Security Services Lead, contractors, and consultants; monitor deliverable deadlines, invoices, and documentation.
- Prepare periodic status reports on administrative operations, compliance status, customer service activity, and project progress for the General Manager.

Website, Public Communications & Document Quality Control

- Maintain and update the District website, including agendas, minutes, financial information, compensation disclosures, public notices, policies, and transparency materials; support accessibility and the online posting requirements applicable to California special districts.
- Draft clear customer notices, rate or service communications, website updates, and public information; coordinate distribution through appropriate channels; maintain customer contact lists and notification tools.
- Maintain quality control over all District documentation: review outgoing letters, reports, forms, notices, and web content for accuracy, formatting, consistency with District templates, and completeness before release.

General Duties & Performance Expectations

- Attend all meetings designated by the General Manager, prepared with the relevant materials, status updates, and recommendations; complete assigned tasks and follow-up items by the deadlines set by the General Manager.
- Actively identify and assume administrative, financial, personnel, and compliance tasks that can be handled at the Supervisor level in order to preserve the General Manager's capacity for executive matters; when elevating an issue to the General Manager, present the relevant facts, the options considered, and a recommended course of action.
- Exercise initiative and sustained attention to detail. The work products of this position are relied upon by the Board of Directors, auditors, regulators, and employees; occasional minor errors are expected to be self-identified and corrected, but recurring errors in Board materials, payroll, financial records, or compliance filings are inconsistent with the requirements of this classification.
- Protect confidential and privileged information; exercise discretion in personnel, legal, financial, closed-session, and Board matters.
- Establish and maintain effective working relationships with elected officials, coworkers, consultants, contractors, regulators, customers, vendors, and members of the public.
- Remain current on laws, regulations, technology, and professional practices relevant to assigned responsibilities; attend training and professional meetings as approved.
- Provide backup administrative support during absences or emergencies; assist with emergency operations, disaster documentation, and cost recovery as assigned.
- Perform all other duties, special projects, and assignments as required by the General Manager, whether or not specifically listed in this job description.

Minimum Qualifications, Required Education & Experience

High school diploma or GED equivalent. An associate degree or higher in business administration, public administration, accounting, finance, human resources, or a related field is highly desirable; a bachelor's degree in a related field may substitute for one (1) year of the required experience.

Five (5) years of progressively responsible administrative, financial support, bookkeeping, human resources, records, or executive support experience, including at least two (2) years supporting a public agency, governing board, or similarly regulated organization, and including experience providing lead direction, training, or supervision to other staff; or an equivalent combination of education, training, and experience that provides the required knowledge, skills, and abilities.

Demonstrated experience independently coordinating several of the position's major functional areas, managing confidential records, and meeting recurring compliance and financial deadlines.

Demonstrated proficiency in Microsoft Office applications, including Outlook, Word, Excel, and PowerPoint, and the ability to learn the District's payroll, accounting, website, and records systems.

Required Licenses/Certifications (at hire or within stated timeframe)

Valid California Class C driver's license with a satisfactory driving record and insurability under District policy.

California Notary Public commission: desirable at hire; must obtain within twelve (12) months of appointment.

Enrollment as a CIWQS Data Submitter with the State Water Resources Control Board within six (6) months of appointment, or as otherwise directed by the General Manager.

Completion of legally required public-agency training and District-assigned payroll, CalPERS, records, ethics, harassment-prevention, emergency management, and cybersecurity training within established timeframes.

Preferred/Desired Qualifications

Bachelor's degree in business administration, public administration, accounting, finance, or human resources.

Certified Board Secretary/Clerk credential through the California Special Districts Association (CSDA), Certified Municipal Clerk (CMC) designation, or comparable clerk-of-the-board training.

Bookkeeping, accounting, payroll, or human resources certification (for example, Certified Bookkeeper, Fundamental Payroll Certification, PHR, or SHRM-CP).

Direct experience with a California special district, city, county, water or wastewater agency, or other local government.

Hands-on experience with Brown Act agendas and minutes, Public Records Act coordination, CalPERS reporting, payroll administration, annual audits, State Controller reporting, insurance administration, and public-agency records retention.

Experience with ADP Workforce Now or a comparable payroll/timekeeping platform; QuickBooks Online or comparable accounting software; Streamline or another government website platform; and gate access or customer management systems.

Experience supervising office staff and administering procurement or contract files.

Bilingual English/Spanish communication skills.

Knowledge, Skills & Abilities

- **Board Governance & Public Records:** Knowledge of public-agency Board and meeting administration, including Brown Act procedures, agenda preparation, minute taking, official records, public notices, records retention, Public Records Act concepts, transparency, and confidentiality requirements.
- **Financial Administration & Internal Controls:** Knowledge of governmental accounting and bookkeeping, accounts payable and receivable, customer billing, purchasing, budgeting, audits, reconciliations, journal entries, documentation standards, and internal controls; ability to maintain accurate financial records and detect discrepancies.
- **Payroll, CalPERS, HR & Benefits:** Knowledge of payroll and timekeeping practices, state and federal wage-and-hour and payroll tax requirements, CalPERS membership and reporting requirements, recruitment and selection, grievance and complaint handling, employee onboarding and separation, benefit and insurance administration, leave administration, personnel records, required training, and confidentiality safeguards.
- **Regulatory Compliance & Reporting:** Knowledge of, or ability to learn, the reporting and permitting obligations of a wastewater and security services district, including water quality, air quality, fire agency, county, state, and insurance requirements; ability to track changes in California law affecting the District, maintain a compliance calendar, and meet fixed deadlines without reminder.
- **Insurance, Risk & Contracts:** Knowledge of public-agency insurance and risk management practices, certificates of insurance and endorsements, contract administration, and procurement documentation; ability to track contract terms and enforce documentation requirements.
- **Supervision & Office Management:** Principles of supervision, training, work planning, performance evaluation, and coverage scheduling; skill in executive support, customer service, deadline control, filing systems, records management, proofreading, research, report preparation, and professional correspondence.
- **Initiative & Accuracy:** Ability to anticipate needs, act without prompting, and follow assignments through to completion; ability to produce Board materials, payroll, financial records, and compliance filings that are consistently accurate and complete; ability to self-check work and correct errors before release.
- **Analytical Judgment:** Ability to interpret and apply laws, policies, procedures, contracts, and reporting instructions; identify inconsistencies; reconcile records; recognize when legal, financial, technical, or management review is needed; develop options and recommendations; and make sound decisions under deadline pressure.
- **Communication & Neutrality:** Ability to communicate clearly and tactfully with elected officials, employees, consultants, regulators, customers, and the public; prepare accurate and impartial minutes; resolve conflicts constructively; maintain neutrality in Board matters; and protect sensitive information.
- **Technology:** Proficiency with Microsoft Office and Microsoft 365 applications (Outlook, Word, Excel, PowerPoint, Teams, and SharePoint or OneDrive), payroll/timekeeping platforms such as ADP, accounting software such as QuickBooks Online, website content-management platforms, PDF tools, spreadsheets, and electronic records systems; ability to learn specialized District applications, regulatory portals, and access-control systems.
- **Organization:** Ability to manage multiple complex workstreams, frequent interruptions, statutory deadlines, delegated tasks, and changing priorities with limited supervision while maintaining accuracy and appropriate follow-through.

Working Conditions & Physical Requirements

- Works primarily in a standard office environment with frequent interruptions, public contact, confidential matters, and firm statutory, payroll, financial, and meeting deadlines.
- This is an on-site position. Remote work may be authorized on a case-by-case basis at the sole discretion of the General Manager, subject to operational needs and office coverage, and is not a term or condition of employment. Remote work will not be approved during the week preceding a Board meeting agenda posting deadline under the Brown Act.
- Frequently sits for extended periods and uses a computer, keyboard, telephone, and standard office equipment; requires visual acuity to review detailed records and hearing and speech sufficient for effective communication.
- Occasionally stands, walks, bends, reaches, and lifts or carries files, supplies, or equipment weighing up to 25 pounds; travels locally for banking, postings, meetings, training, inspections, or other District business.

- Must be able to attend evening Board meetings and adjust the work schedule to meet payroll, legal, audit, emergency, or operational deadlines. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.

Special Requirements

- Successful completion of a background check, reference review, and any other job-related screenings required by the District.
- Ability to maintain the highest level of confidentiality and discretion regarding personnel, payroll, legal, financial, closed-session, and other sensitive District matters.
- Must be available to attend meetings, workshops, training, and District events outside regular business hours when requested by the General Manager. When unable to attend, the incumbent must arrange qualified subordinate coverage acceptable to the General Manager with reasonable advance notice.
- Must be available to work varying hours, including evenings, extended hours, and overtime when required by Board meetings, payroll processing, public notices, audits, elections, emergencies, statutory deadlines, or other operational demands. Overtime and schedule adjustments are subject to General Manager approval; overtime compensation eligibility is governed by the position's FLSA designation on the District's adopted salary schedule.
- Compliance with all District policies, including requirements applicable to disaster service workers under California Government Code Section 3100.
- All other duties and responsibilities as required by the General Manager.

Equal Employment Opportunity

The Pauma Valley Community Services District (PVCSD) is an equal opportunity employer and prohibits discrimination and harassment of any kind. PVCSD is committed to the principle of equal employment opportunity for all employees and to providing employees with a work environment free of discrimination and harassment. All employment decisions at PVCSD are based on business needs, job requirements, and individual qualifications, without regard to any status protected by applicable federal or California law. PVCSD encourages applicants of all ages, backgrounds, and experiences to apply. If you need reasonable accommodation during the application or interview process, please contact the District office at (760) 742-1909 or customerservice@paumavalleycsd.ca.gov.

Pauma Valley Community Services District

Pay Range Salary Schedule - Effective July 1, 2026

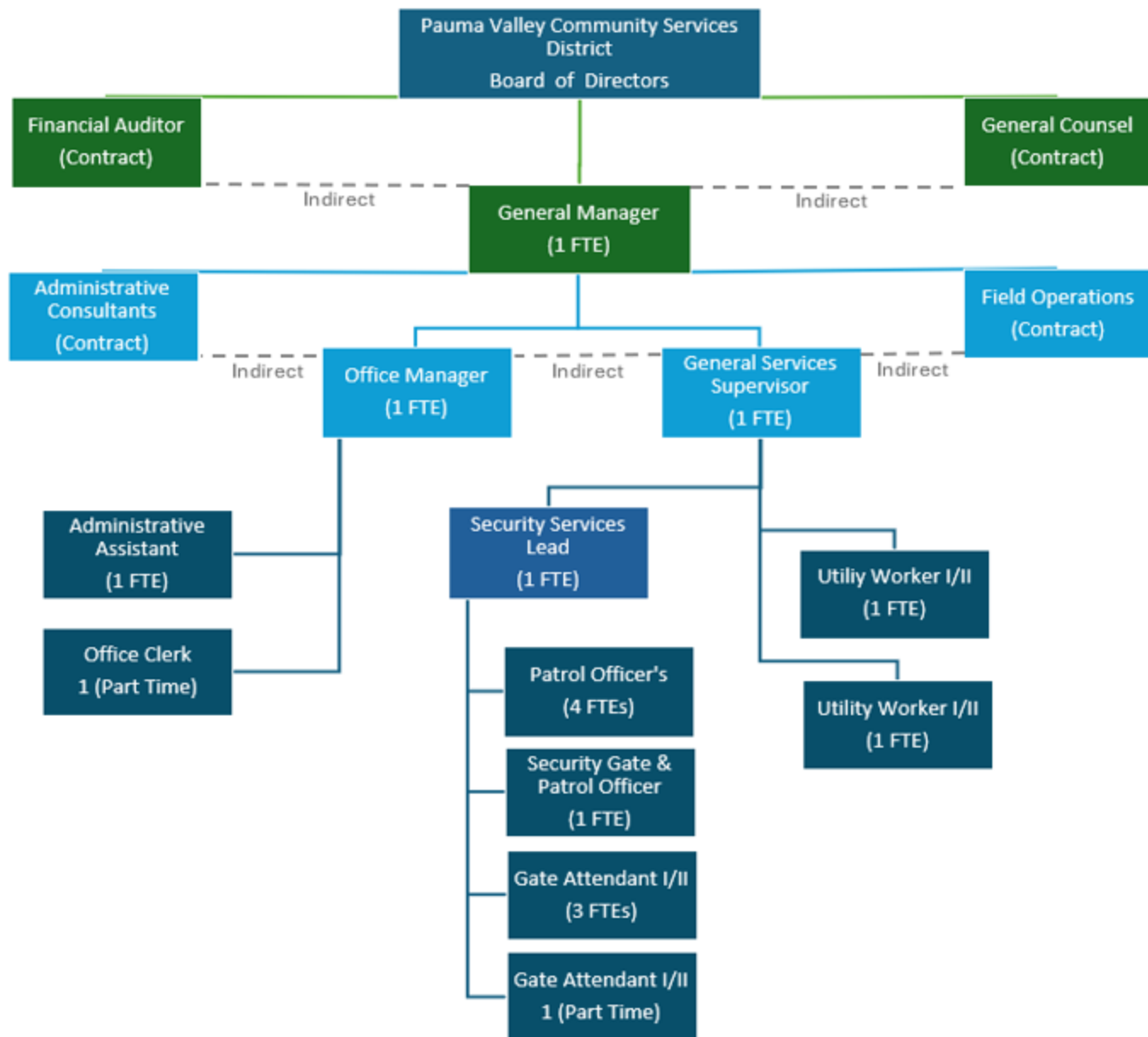
Job Title	hourly min	hourly max	annual min	annual max
General Manager (FLSA Exempt)	-	-	\$123,188.00	\$211,640.00
Office Manager (FLSA Exempt)	-	-	\$55,702.40	\$97,240.00
General Services Supervisor	\$37.96	\$46.02	\$78,957	\$95,722
Administrative Assistant	\$25.75	\$34.89	\$53,561	\$72,575
Office Clerk (Part-Time -18 hrs/week max)	\$20.03	\$27.63	\$18,748	\$25,859
Utility Worker II	\$26.18	\$35.69	\$54,448	\$74,241
Utility Worker I	\$22.57	\$32.16	\$46,941	\$66,886
Security Services Lead	\$27.56	\$33.54	\$57,325	\$69,763
Patrol Officer	\$22.39	\$28.94	\$46,574	\$60,202
Gate Attendant II	\$20.54	\$26.34	\$42,723	\$54,794
Gate Attendant I	\$18.86	\$24.66	\$39,219	\$51,289

Pauma Valley Community Services District

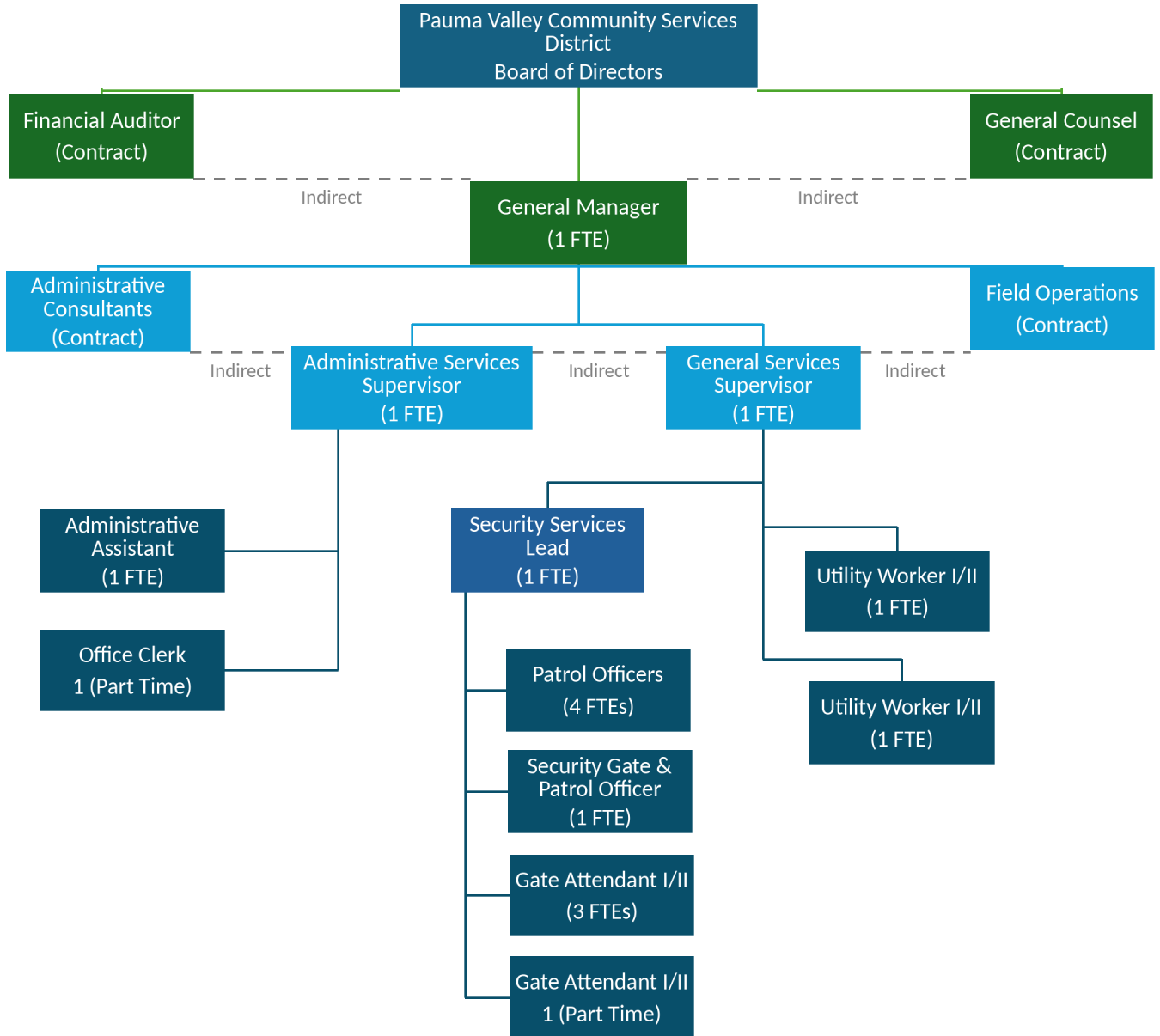
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PAUMA VALLEY COMMUNITY SERVICES DISTRICT



PAUMA VALLEY COMMUNITY SERVICES DISTRICT



CONFLICT OF INTEREST CODE OF THE PAUMA VALLEY COMMUNITY SERVICES DISTRICT

(Amended September 28th, 2026)

The Political Reform Act (Gov. Code § 81000, et seq.) requires state and local government agencies to adopt and promulgate conflict of interest codes. The Fair Political Practices Commission has adopted a regulation (2 Cal. Code of Regs. § 18730) that contains the terms of a standard conflict of interest code which can be incorporated by reference in an agency's code. After public notice and hearing, Section 18730 may be amended by the Fair Political Practices Commission to conform to amendments in the Political Reform Act. Therefore, the terms of 2 California Code of Regulations section 18730 and any amendments to it duly adopted by the Fair Political Practices Commission are hereby incorporated by reference. This incorporation page, Regulation 18730, and the attached Appendix designating positions and establishing disclosure categories, shall constitute the conflict of interest code of the **Pauma Valley Community Services District (the "District")**.

Officials identified in Part A of the Appendix shall file their statements of economic interests electronically with the Fair Political Practices Commission in accordance with Government Code section 87500. All designated positions governed by this Code shall file their statements with the District, through its designated Filing Officer. The Filing Officer shall retain statements filed with the District and make this Code and all retained statements available for public inspection and reproduction during regular business hours (Gov. Code § 81008).

APPENDIX
CONFLICT OF INTEREST CODE
OF THE
PAUMA VALLEY
COMMUNITY SERVICES DISTRICT

(Amended September 28, 2026)

PART “A”¹

OFFICIALS WHO MANAGE PUBLIC INVESTMENTS

Officials who manage public investments, as defined by 2 California Code of Regulations section 18700.3, are NOT subject to the District’s Code, but must file disclosure statements under Government Code section 87200 et seq. [Regs. § 18730(b)(3)] These positions are listed here for informational purposes only.

It has been determined that the positions listed below are officials who manage public investments² :

Position	Disclosure Category
Members of the Board of Directors	1, 2, 3, 4, 5
General Manager	1, 2, 3, 4, 5
Investment Consultant	1, 2, 3, 4, 5

¹ Titles were updated in January 2026.

² Individuals holding one of the above-listed positions may contact the Fair Political Practices Commission for assistance or written advice regarding their filing obligations if they believe that their position has been categorized incorrectly. The Fair Political Practices Commission makes the final determination whether a position is covered by § 87200.

DESIGNATED POSITIONS

GOVERNED BY THE CONFLICT OF INTEREST CODE

Designated Positions	Disclosure Category
General Counsel	1, 2, 4
Office Manager	3, 4, 5
General Services Supervisor	4, 5

Consultants and New Positions³

³ Individuals serving as a consultant as defined in FPPC Reg 18700.3 or in a new position created since this Code was last approved that makes or participates in making decisions must file under the broadest disclosure set forth in this Code subject to the following limitation:

The General Manager may determine that, due to the range of duties or contractual obligations, it is more appropriate to assign a limited disclosure requirement. A clear explanation of the duties and a statement of the extent of the disclosure requirements must be in a written document. (Gov. Code Sec. 82019; FPPC Regulations 18219 and 18734.). The General Manager's determination is a public record and shall be retained for public inspection in the same manner and location as this Conflict of Interest Code. (Gov. Code Sec. 81008.)

PART “B”

DISCLOSURE CATEGORIES

The disclosure categories listed below identify the types of economic interests that the designated position must disclose for each disclosure category to which the designated is assigned.⁴ “Investment” means financial interest in any business entity (including a consulting business or other independent contracting business) and are reportable if they are either located in, doing business in, planning to do business in, or have done business during the previous two years in the jurisdiction of the District.

Category 1: All investments and business positions in business entities, and sources of income located in, that do business in or own real property within the jurisdiction of the District.

Category 2: All interests in real property which is located in whole or in part within, or not more than two (2) miles outside, the jurisdiction of the District, including any leasehold, beneficial or ownership interest or option to acquire property.

Category 3: All investments and business positions in, and sources of income from, business entities that are engaged in land development, construction or the acquisition or sale of real property within the jurisdiction of the District.

Category 4: All investments and business positions in, and sources of income from, business entities that provide services, supplies, materials, machinery, vehicles or equipment of a type purchased or leased by the District.

Category 5: All investments and business positions in, and sources of income from, business entities that provide services, supplies, materials, machinery, vehicles or equipment of a type purchased or leased by the Designated Employee’s department, unit or division.

⁴ This Conflict of Interest Code does not require the reporting of gifts from outside this agency’s jurisdiction if the source does not have some connection with or bearing upon the functions or duties of the position. (Reg. 18730.1)

CONFLICT OF INTEREST CODE OF THE PAUMA VALLEY COMMUNITY SERVICES DISTRICT

(Amended September 2~~8~~6, 202~~6~~2)

The Political Reform Act (Gov. Code § 81000, et seq.) requires state and local government agencies to adopt and promulgate conflict of interest codes. The Fair Political Practices Commission has adopted a regulation (2 Cal. Code of Regs. § 18730) that contains the terms of a standard conflict of interest code which can be incorporated by reference in an agency's code. After public notice and hearing, Section 18730 may be amended by the Fair Political Practices Commission to conform to amendments in the Political Reform Act. Therefore, the terms of 2 California Code of Regulations section 18730 and any amendments to it duly adopted by the Fair Political Practices Commission are hereby incorporated by reference. This incorporation page, Regulation 18730, and the attached Appendix designating positions and establishing disclosure categories, shall constitute the conflict of interest code of the **Pauma Valley Community Services District (the "District")**.

Officials identified in Part A of the Appendix shall file their statements of economic interests electronically with the Fair Political Practices Commission in accordance with Government Code section 87500. All designated positions governed by this Code shall file their statements with the District, through its designated Filing Officer. The Filing Officer shall retain statements filed with the District and make this Code and all retained statements available for public inspection and reproduction during regular business hours (Gov. Code § 81008).

~~All officials and designated positions required to submit a statement of economic interests shall file their statements with the Office Manager as the District's Filing Officer. The Filing Officer shall make and retain a copy of all statements filed by the General Manager and Members of the Board of Directors, and forward the originals of such statements to the Clerk of the Board of~~

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~~Supervisors. The Filing Officer shall retain the original statements of all other officials and designated positions and will make this Code and all retained statements available for public inspection and reproduction during regular business hours (Gov. Code § 81008).~~

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APPENDIX
CONFLICT OF INTEREST CODE
OF THE
PAUMA VALLEY
COMMUNITY SERVICES DISTRICT

(Amended September 26~~8~~, 202~~26~~)

PART “A”¹

OFFICIALS WHO MANAGE PUBLIC INVESTMENTS

Officials who manage public investments, as defined by 2 California Code of Regulations section 18700.3 are NOT subject to the District's Code, but must file disclosure statements under Government Code section 87200 et seq. [Regs. § 18730(b)(3)] These positions are listed here for informational purposes only.

It has been determined that the positions listed below are officials who manage public investments² :

<u>Position</u>	<u>Disclosure Category</u>
<u>Members of the Board of Directors</u>	<u>1, 2, 3, 4, 5</u>
<u>General Manager</u>	<u>1, 2, 3, 4, 5</u>
<u>Investment Consultant</u>	<u>1, 2, 3, 4, 5</u>

~~Members of the Board of Directors~~

~~General Manager~~

¹ Titles were ~~deleted~~updated in August 2022-January 2026.

² Individuals holding one of the above-listed positions may contact the Fair Political Practices Commission for assistance or written advice regarding their filing obligations if they believe that their position has been categorized incorrectly. The Fair Political Practices Commission makes the final determination whether a position is covered by § 87200.

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Investment Consultant

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DESIGNATED POSITIONS

GOVERNED BY THE CONFLICT OF INTEREST CODE

Designated Positions	Disclosure Category
General Counsel	<u>1, 2</u> , 4
Office Manager	3, 4, 5
General Services Supervisor	4, 5

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<u>DESIGNATED EMPLOYEES'</u>	<u>DISCLOSURE CATEGORIES</u>
<u>TITLE OR FUNCTION</u>	<u>ASSIGNED</u>

General Counsel _____ 1, 2 _____

Office Manager _____ 4 _____

Security Supervisor _____ General Services Supervisor _____
_____ 5 _____

Utility Department Supervisor _____ 5 _____

Consultants and New Positions³

³ Individuals serving as a consultant as defined in FPPC Reg 18700.3 or in a new position created since this Code was last approved that makes or participates in making decisions must file under the broadest disclosure set forth in this Code subject to the following limitation:

The General Manager may determine that, due to the range of duties or contractual obligations, it is more appropriate to assign a limited disclosure requirement. A clear explanation of the duties and a statement of the extent of the disclosure requirements must be in a written document. (Gov. Code Sec. 82019; FPPC Regulations 18219 and 18734.). The General Manager's determination is a public record and shall be retained for public inspection in the same manner and location as this Conflict of Interest Code. (Gov. Code Sec. 81008.)

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PART “B”

DISCLOSURE CATEGORIES

The disclosure categories listed below identify the types of economic interests that the designated position must disclose for each disclosure category to which the designated is assigned.⁴ “Investment” means financial interest in any business entity (including a consulting business or other independent contracting business) and are reportable if they are either located in, doing business in, planning to do business in, or have done business during the previous two years in the jurisdiction of the District.

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Category 4: All investments and business positions in, and sources of income from, business entities that provide services, supplies, materials, machinery, vehicles or equipment of a type purchased or leased by the District.

Category 5: All investments and business positions in, and sources of income from, business entities that provide services, supplies, materials, machinery, vehicles or equipment of a type purchased or leased by the Designated Employee's department, unit or division.

⁴ This Conflict of Interest Code does not require the reporting of gifts from outside this agency's jurisdiction if the source does not have some connection with or bearing upon the functions or duties of the position. (Reg. 18730.1)

RESOLUTION NUMBER 142

**A RESOLUTION OF THE BOARD OF DIRECTORS OF THE PAUMA VALLEY COMMUNITY SERVICES DISTRICT AMENDING
THE CONFLICT OF INTEREST CODE
PURSUANT TO THE POLITICAL REFORM ACT OF 1974**

WHEREAS, the Legislature of the State of California enacted the Political Reform Act of 1974, Government Code section 81000 et seq. (the “Act”), which contains provisions relating to conflicts of interest which potentially affect all officers, employees, and consultants of the Pauma Valley Community Services District (the “District”) and requires all public agencies to adopt and promulgate a Conflict of Interest Code; and

WHEREAS, the Board of Directors adopted and amended the District’s Conflict of Interest Code on September 26, 2022; and

WHEREAS, following its 2026 biennial review pursuant to Government Code section 87306.5, the District has determined that changes in its positions and assigned duties warrant amending its Conflict of Interest Code under Government Code sections 87306 and 87307 to add the General Services Supervisor, remove positions that have been abolished or no longer participate in making governmental decisions, revise disclosure categories, and update Form 700 filing procedures; and

WHEREAS, notice of the time and place of a public meeting on, and of consideration by the Board of Directors of, the proposed amended Conflict of Interest Code was publicly posted for review at the offices of the District; and

WHEREAS, a public meeting was held upon the proposed amended Conflict of Interest Code at a regular meeting of the Board of Directors of the District on September 28th, 2026, at which all interested persons were given an opportunity to be heard.

NOW, THEREFORE, BE IT RESOLVED by the Board of Directors of the Pauma Valley Community Services District that the amended Conflict of Interest Code attached hereto is hereby adopted.

BE IT FURTHER RESOLVED that the amended Conflict of Interest Code shall be submitted to the San Diego County Board of Supervisors for approval and shall become effective upon such approval.

PASSED AND ADOPTED by the Board of Directors of the Pauma Valley Community Services District, County of San Diego, State of California, on the **28th day of September, 2026**, by the following vote:

AYES:

NOES:

ABSTAIN:

ABSENT:

Fred Nelson, President

ATTEST:

Michael Esparza
Board Secretary

PVCSD PRESENTS

HALLOWEEN NIGHT

TRICK-OR-TREATING

SATURDAY, OCTOBER 31, 2026 | 5:30-7:30 PM

The PVCSD Board of Directors invites residents and guests to celebrate Halloween inside our community!

EVENT GUIDELINES

IN CHECK-IN

- All visitors must check in at the front gate and will receive a guest pass.

25 SPEED LIMIT

- Please observe the 25 MPH speed limit for everyone's safety.

R FOR RESIDENTS

- Handing out candy? Please leave your porch light on.
- Not participating? Please turn your porch lights off.

T FOR TRICK-OR-TREATERS

- Please respect homes with porch lights off - do not knock or ring doorbells.
- Drivers: Travel slowly and cautiously to protect children and families.



LET'S CELEBRATE HALLOWEEN TOGETHER IN A FUN AND SAFE ENVIRONMENT!



August 7, 2026

Mr. Eric Steinlicht
General Manager
Pauma Valley Community Services District
33129 Cole Grade Road
Pauma Valley, CA 92061

Subject: Compensation Study

Thank you for the opportunity to submit a proposal to conduct a compensation study for the Pauma Valley Community Service District. The following pages provide a breakdown of tasks, costs and timeline. Given our current obligations and deadlines, Bryce would not be able to start this project until mid-September.

Please free to reach out should you have any questions. Again, thank you for the opportunity to be considered for this project.

Sincerely,

Stacy James
Principal, Bryce Consulting

Task 1 - Project Initiation with the District

This task involves all the steps required to initiate the project including a review of District's organizational chart, job descriptions, rules and regulations, MOU language and related information as well as a review and finalization of the study scope, objectives, and process.

Task 2 – Research Labor Market and Confirm Compensation Survey Parameters with District

The overall objective in selecting survey employers is to define as accurately as possible the District's "Labor Market" based on size, services, and geographic location. A labor market consists of those employers with whom the District would compete with for employees. Bryce will research and recommend public agencies based on population served, full-time employees and budget (size), services, and geographic location. It is typically recommended that 8 - 10 agencies be included in the study.

Survey Classes - The survey classes would be representative of all levels of classifications and job series. Typically benchmark classifications are selected for data collection and the recommendations for non-benchmark classes are based on internal alignment. For example, where a series exists, it is standard practice to survey the journey level in the series with the entry and advanced journey levels set a certain percentage below and above the journey level. The consultant will review the benchmark classifications with the District's project team prior to data collection. It is anticipated the following 8 classifications will be surveyed:

- General Manager
- Office Manager
- General Services Supervisor
- Administrative Assistant
- Utility Worker I/II (Journey level to be selected)
- Security Services Lead
- Patrol Officer
- Gate Attendant I/II (Journey level to be selected)

Survey Parameters – The consultant will confirm data elements to be collected. Typical data elements include:

- Minimum and maximum base salary
- Portion of employees' share of retirement paid by the employer

- Deferred compensation contribution and matches paid by the employer
- Longevity pay-Year 10
- Certification/education pay
- Health, dental, vision, life insurance, and long-term disability contributions paid by the employer
- Social Security paid by the employer
- Portion of employers' share of retirement paid by the employee
- Retiree Health Savings Account contributions
- Future cost of living increase data
- Retirement practices (retirement benefit, plan formula, and employer's cost)
- Retiree medical contribution
- Leave benefits (vacation, sick leave, holiday, and administrative leave)

Task 3 - Prepare Information Packet

Once the above task is completed, the consultant will do a thorough review of each agency's websites for budget documents, salary schedules, job descriptions, and Memorandum of Understanding. The consultant will then contact each survey employer to elicit cooperation, explain the scope of the survey, who the study is being conducted for and what information is needed.

Task 4 - Collect and Analyze Salary Survey Data

Determining a comparable classification will include, at a minimum, comparison of the experience and education qualifications required, level within the organization, degree of authority, and scope and complexity of the work performed. Once the data is collected it will be thoroughly analyzed utilizing an electronic spreadsheet. It is anticipated that this analysis would include a detailed presentation of base salary and benefit information for each survey class including the name of the comparable class, the top salary and total compensation, and a comparison between the labor market mean, median or other percentile, and the District for each survey classification.

Task 5 - Review Preliminary Survey Results with the District

Following the preliminary analysis of the survey data, the consultant will conduct an in-depth review of the survey results with the management. The purpose of this review is to identify any additional information needs or areas that require further analysis.

Task 6 – Follow Up Data Collection

Following the review phase of the study, the consultant will collect any additional information needed or requested.

Task 7 – Prepare Salary Recommendations

Once the data has been reviewed with the District’s project team, the consultant will prepare salary range recommendations for all classifications based on relevant labor market data and internal relationship guidelines recommended by the consultant. The internal alignment analysis will link classifications that were not surveyed or where insufficient market data resulted, based on organizational level, scope of work, and requirements. The internal alignment analysis also validates the market data to ensure that the results of the compensation study do not result in compaction between classifications.

Task 8 - Prepare Draft Report

This report will fully document all survey activities:

- Discussion of methodology and labor market survey parameters.
- Presentation and analysis of the survey results.

Task 9 – Present Final Report to the Board of Directors (Remotely)

After the initial review of the findings with the District, the consultant will be prepared to make a presentation to the Board of Directors.

PAUMA VALLEY COMMUNITY SERVICES DISTRICT				
PROJECT HOURS AND COST				
TASK		HOURS	COST	WEEK
1.	Project Initiation with the District	2	\$400	1
2.	Research Labor Market and Confirm Survey Parameters	10	\$2,000	1 - 2
3.	Prepare Information Packet	2	\$400	3
4.	Collect and Analyze Salary Survey Data	28	\$5,600	3 - 6
5.	Review Preliminary Survey Results with the District	2	\$400	7
6.	Follow up Data Collection	3	\$600	8
7.	Prepare Salary Recommendations	5	\$1,000	9
8.	Prepare Draft Report	4	\$800	10
9.	Present Final Report to Board of Directors (Remotely)	1	\$200	TBD
Compensation Study Hours and Cost		57	\$11,400	

It assumed that all tasks will be conducted virtually; therefore, reimbursable expenses related to travel have not been included.

CORPORATE QUALIFICATIONS

Bryce Consulting, Inc. was formed in July 1995 to provide the full range of human resource consulting services to governmental clients. We offer comprehensive and integrated advisory services in the areas of human resources management, recruitment and selection, organization development, and training. Our scope and approach to consulting is based on a solid foundation of professional experience in providing consulting services to local governments.

SERVICES

Bryce Consulting offers a comprehensive range of human resource consulting services including:

Classification and Compensation - This area of the practice includes the development, installation, and modification of all or part of an agency's classification plan and compensation program. Typical study results include compensation policy development; the preparation of class specifications and career ladders that are in compliance with the ADA; internal salary relationship analysis; external compensation surveys; and the development of a revised compensation plan.

Organizational and Management Review and Analysis - This practice area includes the review, analysis and development of organizational structure, staffing, levels, reporting relationships, workflow, and management control systems. Specific tasks include detailed operational and organizational data collection, analysis of current systems and processes, and development of new or modified organizational and operational structures to create operational efficiencies, workload balance and appropriate staffing levels. Implementation includes facilitated processes with management, individual staff, and entire work groups to ensure the broadest understanding and success of the study recommendations.

Training - This service provides both off-the-shelf and custom designed training programs on a wide variety of salient topics to organizations. Depending on the needs of the organization, we provide employee, mid-management, executive management or agency-wide training on topics such as customer service, supervisory skills, mediation and conflict resolution skills, performance development and evaluation, communicating with your boss and interpersonal skills.

Human Resources Systems - Typical assignments in this area result in the development or modification of the basic policy and administrative framework for the agency's human resource management system. Study results include the preparation of personnel rules, policies, and procedures, and employee handbooks.

Performance Appraisal - This service area involves the development and installation of comprehensive performance appraisal systems for both management and non-management staff. These systems are complete and include the necessary forms, procedure manuals, and the training of management and supervisory staff.

STAFF RESUMES

Shellie Anderson will serve as project manager. Ms. Anderson will be joined by Stacy James, who brings a solid background of human resources consulting experience and will be responsible for assisting with project data collection and analysis. Both consultants bring to the assignment extensive experience conducting classification and compensation studies and an in-depth knowledge and understanding of public agency salary and benefit practices, limitations, and trends within the State of California.

SHELLIE ANDERSON

Shellie Anderson is a principal with the firm who brings 25 years of human resource consulting experience within the State of California, specifically within the public sector. Her background includes managing and participating in compensation and classification studies of varying sizes, organizational analyses, recruitment and selection, development of performance evaluation systems, and succession planning. Ms. Anderson has personally completed hundreds of compensation studies and has worked with a variety of public agencies including the State of California, cities, counties, and electric, water, wastewater, and irrigation districts. Ms. Anderson has successfully worked with labor-management groups on multiple studies, to ensure successful accomplishment of study objectives. Ms. Anderson received a Bachelor's degree in Psychology and a Master's degree in Industrial and Organizational Psychology from the California State University, Sacramento. In addition, Ms. Anderson is a Certified Senior Professional in Human Resources. Ms. Anderson served on the Board for the IPMA – HR Sacramento Mother Lode Chapter for nearly a decade.

STACY JAMES

Stacy James is a principal with 18 years of professional human resources experience within the State of California including classification and compensation, recruitment and selection, development of work policies and procedures, and performance appraisal design. Ms. James previously oversaw the personnel practices in nine California Counties for social services and child support services departments which included serving as a business partner, conducting recruitments, determining and developing a variety of assessment processes, conducting job analyses, conducting classification studies, and providing training on rules and regulations governing the departments' merit system. Ms.

James has extensive experience with compensation data collection and analysis. In addition, Ms. James has served as consultant to a variety of State agencies, counties, cities, non-profits, and special districts in the State of California. Ms. James earned her Bachelor's degree in Psychology from California State University, Sacramento.

Total Compensation Study



PROPOSAL **Pauma Valley** **Community Services District**

Vicki Quintero Brashear

Chief of Client Services

Submitted: August 14, 2026

2450 Del Paso Road, Suite 220,
Sacramento, CA 95834
(916) 471-3481
Tax ID: 68-0067209
cpshr.us

Office Locations:
CALIFORNIA | COLORADO | TEXAS | OHIO

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August 14, 2026

Eric Steinlicht, General Manager
Pauma Valley Community Services District
33129 Cole Grade Road
Pauma Valley, CA 92061

Subject: Total Compensation Study

Submitted via e-mail to: eric.steinlicht@paumavalleycsd.ca.gov

Dear Mr. Steinlicht:

CPS HR Consulting (CPS HR) is pleased to submit this proposal to the Pauma Valley Community Services District (District) to provide professional compensation consulting services. We are excited to deliver these services as your potential partner in achieving organizational excellence.

ORGANIZATION IDENTIFICATION INFORMATION	
Legal Name and DBA	Cooperative Personnel Services dba CPS HR Consulting
Main Office	2450 Del Paso Road, Suite 220, Sacramento, CA 95834 <i>*Primary location from where services will be based</i>
Regional Offices	20211 Guadalupe Street, Suite 260, Austin, TX 78705 7350 E Progress Pl., Greenwood Village, CO 80111 1968 S. Coast Hwy #961, Laguna Beach, CA 92651 2014 Champions Gateway, 3rd Floor, Canton, OH 44708
Type of Business	Joint Powers Authority (Public Agency)

CPS HR is committed to providing the District with responsive, high-quality compensation consulting services and to managing the engagement in a way that successfully meets the District's objectives.

We look forward to the potential of working with the District. Should you have questions, please feel free to contact either ***Tiffany Bose, HR Client Success Manager, at (916) 471-3390; tbose@cpshr.us, or me at (916) 471-3481; vbrashear@cpshr.us.***

I am duly authorized to bind CPS HR to the terms of this proposal and into contract.

Sincerely,



Vicki Quintero Brashear
Chief of Client Services

Our Background and Experience

About CPS HR Consulting

CPS HR is a client-focused human resources and management consulting firm, dedicated to addressing the unique challenges faced by government and non-profit organizations. **Founded in 1985** as Cooperative Personnel Services (dba established 2011), we have earned a reputation as a trusted advisor by leveraging our in-depth public sector expertise to deliver practical, results-driven solutions. As a Joint Powers Authority, we are a self-supporting government agency exclusively serving public entities. This gives us a distinct advantage in understanding and meeting the specific needs of clients across all levels of government, including Federal, State, Local, Special Districts, Higher Education and Non-Profit organizations.

With more than 100 full-time employees and a network of 200+ project consultants and technical experts across the nation, CPS HR has partnered with more than 2,700 public and non-profit clients throughout the United States. Headquartered in Sacramento, CA, with regional offices in Texas, Colorado, Ohio, and Southern California, we are strategically positioned to support your organization's growth and help your employees fulfill the promise of public service.

Client Focused

We help clients succeed by:

- **Understanding Their Goals:** We listen to your needs, understand your business, and focus on achieving your desired outcomes.
- **Unlocking New Perspectives:** Together we explore new ideas, expand possibilities, and consider the broader impact on those you serve.
- **Bringing Solutions to Life:** We put plans into action, making strategies operational and effective.
- **Empowering Their Growth:** Provide you with the tools and knowledge to elevate performance and expand capabilities for your organization and those you serve.

Joint Powers Authority. Cooperative Personnel Services, doing business as CPS HR Consulting, is a national firm and is a governmental Joint Powers Authority (JPA) of the State of California. A JPA is a public agency created pursuant to the Joint Exercise of Powers Act (Government Code 6500 et seq). This Act allows two or more government agencies to establish a new public entity authorized to exercise those powers jointly held. A JPA is an instrumentality of a state or a political subdivision of a state and is not a registered corporation of any state. Cooperative Personnel Services was established under a "Joint Powers Agreement" by the State Personnel Board of the State of California, the counties of Sacramento and Sonoma, the Hayward Unified School District, the City of Anaheim, and the East Bay Municipal Utility District, and its purpose is to provide the opportunity for the joint powers "to discuss, study and solve common or similar problems with respect to modern human resource and related management processes."

Qualifications and Capability

For over 40 years, CPS HR has conducted hundreds of classification and compensation studies for public agencies, including cities, counties, towns, special districts, regional agencies, and higher education. Our experience includes projects of varying size and complexity, from focused classification reviews to comprehensive organization-wide compensation and total compensation studies.

CPS HR is an HR Business Partner of the California Special Districts Association (CSDA). CSDA has teamed up with CPS HR Consulting to provide CSDA members with exclusive access to our Human Resources Service offerings. **As CSDA Partners,** we are privileged to serve CSDA member agencies, like yours, by providing access to skilled public sector HR Consultants who possess a deep bench of expertise, while providing guidance through our Executive Search, HR Membership, HR Consulting On-Demand, training, and classification and compensation services. In fact, we have worked with more than 300 special districts in the past five years.

At CPS HR, we work beyond the usual transactional nature of business relationships. Our philosophy is rooted in partnership with a shared vision and mutual goals. We bring our wealth of expertise to the table to align it with the unique aspirations and strategies of each client.

Extensive Public Sector Expertise: We have a profound depth of experience working **exclusively** with public agencies and non-profit organizations. CPS HR is a joint powers authority, and as such, our charter mandates that **we provide services only to public agencies and non-profits, which includes Special Districts, Cities, Counties, and other Local Government Agencies.** Over the years, we have conducted numerous classification and compensation studies for a wide array of public agencies.

Examples of Completed Projects List

Due to the significant number of projects, we provided a partial list of public agencies for which we have provided classification and compensation services, which follows.

Classification and Compensation Partial Five-Year Listing	
Albert Einstein Academies	Fremont Sanitation District (CO)
CA Department of Industrial Relations	Fresno Unified School District
California High-Speed Rail Authority	Imperial County
CA Infrastructure and Economic Dev. Bank	Imperial Irrigation District
California Office of the State Public Defender	Inland Empire Utilities Agency
California Public Utilities Commission	Jefferson Union High School District
California State Lands Commission	Las Gallinas Valley Sanitary District
CalOptima	Long Beach Water Department
Cathedral City	Mariposa Co USD/Mariposa Co Office of Education
Chaffey College	McKinleyville Community Services District

Classification and Compensation Partial Five-Year Listing	
City of Carlsbad	Mendocino County
City of Carpinteria	North County Transit District
City of Commerce	Northern California Power Agency
City of Glendora	Ojai Valley Sanitary District
City of Long Beach	Orange County
City of Menlo Park	Orange County Fire Authority
City of Newport Beach	Paradise Irrigation District
City of Palm Desert	Paratransit
City of Rancho Cucamonga	Port of Long Beach
City of San Luis	Rancho Santa Fe Fire Protection District
City of San Mateo	Redlands Unified School District
City of Santa Cruz	Reef-Sunset Unified School District
City of Santa Monica	San Diego Association of Governments
City of Sheridan (CO)	Santa Clarita Valley Water District
City of Temecula	Schools Excess Liability Fund
Colorado Department of Law	Sequoia Union High School District
Colorado River Fire Rescue (CO)	Soldier Canyon Water Treatment Authority (CO)
County of Calaveras	Southeastern CO Water Conservancy District (CO)
County of Elbert (CO)	CA State Controller's Office
County of Morgan (CO)	Superior Court of California - Tulare County
County of Otero (CO)	Superior Court of California, County of Sacramento
County of Routt (CO)	Town of Elizabeth (CO)
County of San Joaquin	Tulare County
County of Sonoma	Vail Recreation District (CO)
Covered California	Ventura County Transportation Commission
Cucamonga Valley Water District	West Valley Water District
Eagle River Water and Sanitation District (CO)	Western Area Power Administration (CO)
El Dorado County Office of Education	Williams S. Hart Union High School District
First 5 Santa Clara County	Tulare County
Folsom Cordova Unified School District	Vail Recreation District (CO)
Fort Collins-Loveland Water District (CO)	Ventura County Transportation Commission

References

Rancho California Water District

Contact: Diane Enzo, Director of Human Resources; (951) 296-6929; dienzoe@ranchowater.com

Dates of Service: November 2024 – April 2025

Description of Services: CPS HR completed a comprehensive total compensation study for Rancho California Water District. The project included research and recommendation of 15 comparable labor market agencies; review of 66 benchmark classifications; internal equity analysis; salary range recommendations; collection and comparison of salary and benefits data; classification review; FLSA determinations for 14 classifications; and preparation of salary schedules and recommendations that were ultimately approved by the Board.

Santa Clarita Valley Water Agency

Contact: Ari Mantis, Human Resources Manager; (661) 297-1600 ext. 235; amantis@scvwa.org

Dates of Service: 2022–2023

Description of Services: CPS HR conducted a comprehensive classification, compensation, and organizational study for Santa Clarita Valley Water Agency. The engagement included review of up to 59 classifications and up to 130 incumbents; an employee orientation; online position description questionnaires and supervisor review; selected incumbent/supervisor job evaluation interviews; updates to existing classification specifications and preparation of up to five new classification specifications, as needed; update of the classification structure; FLSA analysis at the classification level; base salary collection, analysis, and comparison for up to 36 benchmark classifications; labor market research and recommendations for up to 10 agencies; use of aggregated private sector salary data; delivery of data sheets and job matches; updated salary recommendations and compensation structure; discussion of implementation considerations; a project report; and formal presentations.

McKinleyville Community Services District

Contact: Patrick Kaspari, General Manager; (707) 839-3251; pkaspari@mckinleyvillecsd.com

Dates of Service: March 2023 – August 2023

Description of Services:

CPS HR conducted a comprehensive Total Compensation Study for McKinleyville Community Services District. The engagement included salary and benefits analysis; labor market research and comparison of 10 comparable agencies; review of 17 benchmark classifications; collection, validation, and analysis of compensation and benefits data; job matching; development of compensation data sheets; internal review and quality control of study results; salary recommendations; and presentation of final deliverables to District leadership. The study evaluated both base salary and total compensation and provided market-based recommendations to support future compensation decisions.

Approach and Methodology

Our Understanding of the Scope of Services

We understand the District is seeking a total compensation study within the following parameters:

■ Total Compensation Study

- Salary¹ plus benefits collection, analysis, and comparison
- Up to **12 benchmark classifications** (list provided by the District)
- Labor market pool of **8–10 agencies** (CPS HR will conduct research and provide recommendations to the District)
- Internal equity analysis at the classification level and
- Conduct individual employee pay equity audit
- Delivery of data sheets and benefits tables showing market results and job matches
- Updated salary recommendations and discussion of implementation considerations
- Provision of project report and up to one (**1**) formal presentation at the conclusion of the study

Work Plan

Review the District’s Background Materials. Upon contract execution, CPS HR will request and review relevant background information provided by the District, such as current salary schedules, benefits information, classification titles/descriptions, organization charts, staffing information, and other materials needed to confirm the study parameters. This review will help CPS HR prepare for the initial project meeting, understand the District’s current compensation practices, and identify any questions related to benchmark classifications, labor market comparisons, benefits elements, and desired market position for the study. The CPS HR Project Manager will coordinate activities through and report to the District’s Internal Project Manager and other designated key stakeholders.

Initial Project Meeting. The primary objective of this task is to conduct an initial meeting between the CPS HR Project Manager and the District’s Internal Project Manager along with other designated stakeholders. This meeting will aim to align all parties on the study methodology, deliverables, timelines, communication strategies, and data collection methods. Additionally, the meeting will serve as an opportunity to delve into the specifics of the District’s current compensation philosophy and its market positioning goals.

¹CPS HR collects the minimum and maximum of the salary range; not actual, individual salaries.

The following key elements will be discussed:

- Overall scope of the study
- Benefit elements to be collected
- Data gathering methodology and the job matching process
- Review whether the District aims to lag, meet, or lead the market
- Use of median, mean, or other percentiles for market positioning
- Labor market agency selection
- How benchmark classifications compare to similar roles in competitor agencies or organizations
- Deliverables and first immediate steps

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- It is assumed that no more than **12 benchmark classifications** will be surveyed.
 - CPS HR will complete a benchmark summary matrix using District-provided background materials.
- It is assumed that **8–10 total labor market agencies** will be selected for salary plus benefits comparison.
 - CPS HR will research **up to 15** comparable labor market agencies and provide recommendations for final selection by the District.
- After the kick-off meeting, CPS HR will provide a project parameters memo for the client's review and approval, ensuring mutual alignment before progressing with the project.
 - CPS HR will furnish an estimated timeline, including key milestones, shortly following the approval of the project parameters document.

Design, Develop, and Distribute the Survey Instrument. The CPS HR Project Team will develop a comprehensive survey instrument to ensure the effective collection of compensation data from each of the survey agencies. The online survey will include a brief description of each of the survey classifications with a request for the minimum and maximum monthly salary for each.

For a *base salary* study, the survey instrument will include a brief description of each of the survey classifications with a request for the minimum and maximum monthly salary for each. Salaries are retrieved from published salary schedules effective on an agreed upon date.

For a *total compensation* study, the following elements of total compensation are added to the base salary survey:

- Retirement Contributions - Money paid by the employer on behalf of employees (members). The data are collected for reporting and are included in total compensation calculations.
 - Employer Retirement Contribution - CPS HR reports and analyze a stated percentage of salary paid by the employer or the employee at the current point in time. The normal cost rate is collected, which excludes unfunded accrued liability.

- Medicare – Contribution rate of 1.45% times the base salary median is used to calculate total compensation, there is no maximum compensation limit.
- Social Security (if agency participates) - Contribution rate is 6.20% of the median compensation and is included in the total compensation calculation.
- Health benefits data are collected for reporting and are included in total compensation calculations.
 - Medical, Dental, and Vision benefits, based on the maximum contribution for family coverage (employee + 2 or more dependents)
 - Cafeteria Plans (Flex Credit & Health Savings Account)
- These data are collected for reporting purposes only and are not included in total compensation calculations.
 - Sick Leave, Holiday Leave, Vacation Leave, Paid Time Off, and Administrative/Management Leave
- Cash Add-Ons are defined as “supplemental pay and benefit components that are equivalent to cash for the employee” and are typically found in a benefit summary document or bargaining agreement. The data are collected for reporting and are included in total compensation calculations.
 - Retirement Pick-up (i.e., Employer Paid Member Contribution (EPMC))
 - Deferred Compensation (i.e., 457b, 401k, 403b)
 - Incentives (only education/certifications, performance)
 - Longevity
 - Allowances (only vehicle, cell phone, and uniform, as applicable)

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- The client may add other benefits elements, should it desire, at an additional cost.
- The client shall complete a spreadsheet (template provided by CPS HR) detailing the client’s benefits elements and their costs/details.
- Please note that only employer costs are collected; not employee costs.

Review, Analyze, and Validate Labor Market Survey Data. CPS HR begins labor market data collection by researching available information online to make preliminary classification matches and obtain data. The CPS HR Project Team will reach out to labor market agencies to confirm and/or complete survey data after completing as much pre-work as possible. We find that this initial collection effort results in greater participation from the labor market agencies. Once CPS HR has completed their survey analysis tasks, the CPS HR Project Manager will audit the final data as part of our quality review process.

Classification matching includes reviewing agency background materials such as copies of classification specifications, organization charts, staffing information, and other useful materials to substantiate the accuracy of the comparability of the matches. To determine whether a match from a labor market agency is comparable to the District's benchmark, CPS HR utilizes a whole job analysis methodology; this commonly used methodology analyzes the job as a whole, rather than by individual factors, by evaluating the core duties and responsibilities, the nature and level of work performed, and the minimum qualifications to determine whether the classification is comparable enough to be utilized as a match. The methodology recognizes slight differences in duties assigned to matches from other labor market agencies which do not impact the type, nature, and level of work performed. Matches should not be so broad that they include classifications performing dissimilar work, or work done at a higher or lower level, but they also should not be so narrow that they exclude matches doing comparable work, with slight differences in work that do not change the level and nature of work.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- Should any labor market agencies be non-responsive to requests for information, we will provide the client with contact information and request that they use their professional contacts to follow up on CPS HR's behalf. We have found this approach to be beneficial.
- Additional labor market agencies may be added by the client should any in the initial selection be non-responsive or not provide sufficient matches at an additional cost.
- **Responsiveness of labor market agencies is absolutely critical to maintaining the agreed timeline.** An amended timeline will be provided by the CPS HR Project Manager if the data collection period is pushed out. Any contract amendment needed due to timeline shift will be discussed with the client at the appropriate point.
- The client shall review the job matches made for each of the comparable labor market agencies. An opportunity for two rounds of feedback/updates to the job matches will be provided to the client. The client will provide any changes/edits, if needed, within two (2) weeks of initial receipt of the job matches, if not sooner.

Design and Develop Data Spreadsheets. Once the matches are finalized and approved, CPS HR will develop an individual data sheet for each survey classification that presents the comparable classification used in each agency with the relevant data associated with that classification, such as the position ranking within the labor market and salary range minimum and maximum.

Once the labor market data have been reviewed, analyzed, and validated, CPS HR will use the data sheets to present each survey classification's position within the District-approved labor market based upon the labor market position affirmed for the study, such as the median, mean, or other percentile.

Conduct Benefits Analysis. The benefit data submitted from the labor market agencies will be analyzed quantitatively and qualitatively. In the quantitative analysis, specific benefits will be incorporated into the base salary data sheets to provide a total compensation analysis. This analysis of program costs will provide the client with an understanding of how the study classes compare against their market when the costs of benefits programs are taken into consideration.

Within these data sheets, four different analyses can be conducted based on how our clients wish to view the data:

- An analysis of the survey classification's position within the labor market for base salary
- An analysis of the survey classification's position within the labor market when the cost of cash add-ons is taken into consideration (total cash)
- An analysis of the survey classification's position within the labor market when the cost of cash add-ons and health programs are taken into consideration
- An analysis of the survey classification's position within the labor market when the cost of cash add-ons, health program costs, and retirement contributions are taken into consideration (total compensation)

The qualitative analysis will include the general trends and practices of benefits offered across the agencies summarized in tables and provided in an Excel file.

Conduct Internal Equity Analysis and Prepare Salary Range Recommendations. A well-rounded compensation program encompasses an evaluation of external labor market data as well as a careful assessment of internal job relationships aligned with the client's pay values. The internal equity analysis for non-benchmark classifications involves a series of essential steps to establish fair and consistent relationships. These steps include:

- **Analysis of Pay Relationships:** This involves evaluating pay relationships based on the hierarchy of jobs and historical pay practices.
- **Development of Guidelines:** These guidelines encompass factors like span of control and the nature and level of work performed.
- **Recommendation of Differentials:** Based on the above analysis, we will recommend equitable and appropriate internal relationship differentials between classifications/pay grades.

Our methodology for setting salary range levels for both benchmark and non-benchmark classifications follows these steps, ensuring consistency across all agency study classifications:

- **Benchmark Classifications:** We identify benchmark classifications that serve as reference points for salary setting based on market data.
- **Salary Recommendations:** Salary levels for benchmark classifications are established in line with market data.
- **Internal Alignment Review:** We conduct a comprehensive review of the agency's existing internal alignment differentials to assess where adjustments are needed.
- **Internal Differentials:** Recommended internal differentials are applied within job families to determine salaries for classifications with significant relationships due to shared job series or family.
- **Remaining Classifications:** For non-benchmark classifications or those with limited comparable data, we evaluate their alignment with other classifications based on factors such as job nature, level, and minimum qualifications.

The salary recommendations for each study classification will include:

- Classification Title
- Current Monthly Range Maximum
- Recommended Monthly Range Maximum
- Percentage or Dollar Amount Differences between Current and Recommended Ranges, including steps within a range if desired.

Finally, developing salary recommendations is a complex process that involves a thorough evaluation of market data, internal equity, and the District's study parameters. This analysis helps identify recommended salary range adjustments for the study classifications. Some key technical aspects include:

- **Range Type Decision:** Whether to use an open range or a step system for salary scales, considering factors like flexibility and performance-based incentives.
- **Bandwidth Analysis:** Analyzing the width between the minimum and maximum salaries within each pay grade to determine the balance between cost control and talent attraction and retention.
- **Separation Between Pay Grades:** Reviewing the separation between pay grades to ensure clear distinctions in job value and responsibilities, aligning them with market standards, internal equity, and the organization's compensation philosophy. This will help easily spot situations where there is minimal pay difference between employees at different levels.

Client Responsibilities and/or Pricing Assumptions Associated with Task:

Prepare and Present the Compensation Report. CPS HR will develop a report detailing the results of the methodology and results of the labor market survey. This report will be comprised of the following:

- Scope of the study, list of benchmark classifications and labor market agencies
- Results of the base salary and total compensation survey (job matches to be provided under separate cover in MS Excel)
- Labor market data analysis (data sheets and benefit tables provided under separate cover in MS Excel)
- Actions taken to develop salary recommendations

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- Costs assume one (1) meeting, for up to 1 hour to informally discuss the report with the client's primary project team.
 - We have also budgeted for one (1) formal presentation for a stakeholder group of the client's choosing. The client may add other formal presentations, should it desire, at an additional cost.
- The client will have one opportunity to provide feedback and request updates to the report. These change requests will be submitted within a mutually agreed timeframe following the initial receipt of the report.

Individual Pay Equity Audit

CPS HR has developed a practical, tested solution to conduct statistical analysis of equal pay in public agencies. According to the Equal Pay Act of 1963, the state of inequity exists when workers performing similar jobs that require similar efforts, knowledge, skills, and performed under similar working conditions do not receive equal pay. Our statistical model reveals pay gaps based on characteristics for each employee within the same job classification or similar jobs.

Task 1 – Review of current pay/definition of substantially similar jobs. Our methodology begins by studying the classifications (**up to 12**) in the District to understand if factors (skill, effort, responsibility) affecting work by the different employees (**up to 15**) are “substantially similar” enough to require equal wages. We will then examine employee census records concerning compensation for the workforce over an agreed upon period of time. The data will be sorted according to factors such as race, sex, age, relevant job experience, tenure, and other factors discussed and selected by the agency and confirmed by CPS HR.

Task 2 – Conduct analyses. CPS HR will then use statistical and analytical tools and techniques, such as scatter plot diagrams, regression analysis, logarithmic formulas, compa-ratios, range penetration, trimming, interpolation, extrapolation, and any other applicable techniques that are useful for the data sets under study to determine whether potential disparate impact exists.

In tandem with the statistical analyses on wages, our consultants will also review fair pay regulations in the Equal Pay Act of 1963, the Lilly Ledbetter Fair Pay Act of 2009 and regulations pertaining to fair employment practices under Title VII of the Civil Rights Act of 1964, its amendments, and any pertinent State legislation, to precisely define the responsibilities of an agency within the state it resides. In addition, agency internal pay policies, practices, pay structure, and pay schedules (grades, ranges, steps, midpoint progressions, grade overlaps) will be reviewed to determine if specific groups of employees have been rewarded with higher starting wages, periodic salary raises, training opportunities and/or bonuses more frequently and more generously than other groups of employees.

Task 3 – Calculate potential wage disparity and determine target pay rate. With these data in hand – both quantitative and qualitative - CPS HR will then calculate any potential wage disparities. We will also account for pay practices which may have had a negative impact on certain groups of employees.

Once possible pay inequities have been defined, CPS HR consultants will use (developed in concert with the client) selected objective criteria (relevant experience, tenure, performance, skill level, and/or education, etc.) to calculate a target pay rate for each employee. To identify a target pay rate in a consistent and methodical manner and without any bias, CPS HR will develop a statistical tool that calculates a targeted pay rate for each employee via the criteria through a proprietary logarithmic formula and the use of multiple regression analysis. The tool will calculate the differences to determine how much the agency would need to pay to make employees whole and to remedy or rectify inequities uncovered during the analysis.

Our consulting team will work with identified stakeholders within the organization as well as any finance and legal representatives to assist in decisions affecting employee pay (such as calculating costs to make employees whole).

Client Responsibilities and/or Pricing Assumptions Associated with Task:

- CPS HR will define substantially similar jobs and examine potential wage gaps based on up to two (2) characteristics (such as gender, ethnicity, etc.) selected by the client.
 - The client will provide base pay for each employee and relevant demographic information in an Excel spreadsheet developed by CPS HR.
 - CPS HR will provide information on potential wage disparities.
- CPS HR will then develop a tool to calculate a target pay rate for each employee.
 - **The client will select up to three (3) legitimate wage drivers (i.e., relevant experience, tenure, performance, education or other variable) to determine the consistent target pay rate for each employee. Those drivers will be the same for all jobs.**
 - **The client will provide the information related to the selected objective criteria in an Excel spreadsheet developed by CPS HR.**
 - CPS HR will calculate the target pay rate and discuss implementation scenarios with the client. Final cost determination will be the responsibility of the client.
- A brief summary memo will be provided outlining the project methodology, findings, recommendations, and actions taken.

Project Timeline

The CPS HR Project Manager and the District will discuss project sequencing and timing at the initial project meeting and will customize a detailed milestone timeline after the study parameters are confirmed. CPS HR recommends a structured timeline that remains flexible enough to accommodate data availability, comparator agency responsiveness, review cycles, and other factors that may affect milestone completion.

Our compensation timelines are based on the following assumptions:

- Selected labor market agencies will provide the information required within the specified timeframe
- the District will be able to review, comment on, and approve study products within agreed-upon deadlines

We estimate the timeline for this scope of work to be conducted is:

- Total Compensation Study: **4 months**

Cost

Professional Fixed Fee Menu

CPS HR has prepared the following professional fixed fee menu based on the scope of work outlined.

Compensation Survey Component	Professional Fixed Fee
Total Compensation Study – 8 Labor Market Agencies	\$19,900
Total Compensation Study – 10 Labor Market Agencies	\$22,300
Individual Employee Pay Equity Audit	\$6,750
Pay Structure Update	\$2,100

Pricing Assumptions

Not Included in Fixed Fee Amount:
Materials Production - CPS HR provides all documents electronically. Hard copy printing of documents for this engagement will be the responsibility of the Client.
Expenses - We have not included travel costs since all work will be conducted virtually through the use of tele- and web-conferences and the sharing of documents through an online portal provided by CPS HR.

Billing Terms

CPS HR will bill in equal installments at the following milestones:

1. After client kick off meeting
2. Provision of labor market agency research
3. Client approval of project parameters memo
4. Conduct of internal matching training
5. Submission of draft matches
6. Provision of data sheets
7. Submission of compensation report

It is assumed that the Client will be responsive to the delivery of all draft deliverables and all subsequent revisions as defined in the agreed upon project timeline. **Unanticipated revisions or delays to the project timeline could result in a need for an addendum to the contract related to contract end date, staff assignments, and/or pricing. Any addenda will be discussed in a timely manner with the Client.**

Pricing Philosophy

CPS HR is flexible with the proposed work plan; alternative approaches may be discussed with the Client which may change the proposed cost of the project. As described in this proposal, the methods, approach, timelines, as well as the proposed fee, have been prepared as accurately as possible based upon the services requested and study objectives described in the information provided to CPS HR. The proposed professional fees reflect the steps and time necessary to conduct the study in a sound, thorough, and sustainable manner, including important input and review by the Client's Internal Project Manager and designated stakeholders to accomplish the study objectives. If changes or additional services are required, we will be happy to discuss changes to the project activities, schedule, and/or fee proposal.

Pauma Valley Community Services District

Compensation Services

August 25, 2026

Mr. Georg S. Krammer

Managing Director | Public Sector, Community & Education

2121 N. California Boulevard, Suite 350

Walnut Creek, CA 94596

510.274.2760 | georg_krammer@ajg.com

Gallagher Benefit Services, Inc. | ajg.com



Gallagher

Insurance | Risk Management | Consulting

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Cover Letter

August 25, 2026

Mr. Eric Steinlicht
General Manager
Pauma Valley Community Services District
33129 Cole Grade Road
Pauma Valley, CA 92061

Dear Mr. Steinlicht:

We appreciate the opportunity to present this proposal regarding the services Gallagher's Human Resources & Compensation Consulting practice can offer Pauma Valley Community Services District (District). Gallagher is highly capable and qualified to work with the District based on our extensive experience with public sector organizations across the country, including hundreds of special districts throughout California, especially in the utilities, water, and wastewater industries, among whom we worked with many community services districts. We would consider it a privilege to serve the District in this capacity.

It is our understanding that the District is seeking compensation services and job description review and updating.

We believe we will provide the District with the most diversely experienced project team of any consulting practice in the country, which enhances the solutions and recommendations we will provide on this engagement. The questions and perspectives provided by our team help us anticipate any issues the District may face throughout this project, as well as the ongoing management of the updated classification and compensation system.

We have prepared the following proposal in response to your request. We appreciate having the opportunity to submit this proposal and look forward to assisting the District in this engagement.

Sincerely,



Georg S. Krammer
Managing Director, Practice Operations & Hub Leader
510.274.2760 | Georg_Krammer@ajg.com



Erik Smetana
Managing Director & National Practice Leader
314.494.4849 | Erik_HenrySmetana@ajg.com

Organizational Overview

Value Proposition:

The ability to deliver comprehensively structured human capital solutions to clients is Gallagher's signature in the marketplace. At Gallagher, we want to know what makes your organization unique. We listen intently to learn about your culture and priorities and delve deeply into all the details that matter when balancing human capital needs with your bottom line. This single-minded focus on excellence — characterized by innovation and creativity — is the driving force behind every Gallagher engagement.

Company History:

Arthur J. Gallagher & Co. opened its doors in 1927 and remains “growing strong” thanks to a proven ability to help clients think ahead. Founded by its namesake who was previously the leading producer for Chicago's largest insurance brokerage, Gallagher is now one of the world's largest human capital, insurance brokerage and risk management services firms. We have operations in 33 countries and extend our client-service capabilities to more than 90 countries through a global network of correspondent brokers and consultants. Since 1961, we have been helping clients overcome business barriers and create new opportunities to cost-effectively attract, retain, and productively engage the best performers in their field. Gallagher started trading on the NYSE under the symbol AJG in 1984.

About Gallagher

Sustained growth. Steady focus on quality.



Company Culture & Philosophy:

The ideals, principles, and values embodied by the founder, whose name still appears on our door, are part of our corporate DNA. Gallagher's approach to business, cultivated through three generations of family leadership, has always centered on creating relationship value as true partners to our clients. Gallagher's interactions with you will be straightforward and candid. By earning our clients' trust, we have sustained a reputation for ethics and transparency that continues to contribute to our growth.

The high standards of conduct we have set for our external professional relationships are the same rules we follow internally. The Gallagher Way, a one-page document outlining our 25 shared values, was written in 1984 but remains just as culturally relevant today. It speaks to the value of relationships, and several tenets set guidelines for ethical behavior. Gallagher combines innovative solutions, thoughtful advice, and honest business practices to minimize risk and help fuel your success.



We push for professional excellence.

The Gallagher Way. Since 1927.

Talent Practice:

Gallagher's Talent practice empowers clients to **attract talent, manage staff, develop leaders, and reward success**—leveraging the power of Gallagher and the wisdom of experience to build an engaged, productive workforce. Tapping into expertise that spans the spectrum of human resources at every level, we can assemble flexible compensation and consulting solutions that improve efficiency and build bottom lines.

Our practice combines some of the most respected names in human resources and compensation consulting. As we have expanded our services and reach, we have strengthened our ability to serve our clients – including the acquisition and integration of talented firms, consultants, and advisors from Koff & Associates (2021) and Buck (2023). Bringing together experts from compensation, performance, compliance, data and analytics, survey, search, and leadership fields, Gallagher empowers clients with tools for the entire employment lifecycle.

With an experienced team of consultants located in offices across the United States and Canada, our services include:



HR & Organizational Effectiveness

Think of us as your strategic partner and an extension of your HR and organizational change team.

Compensation & Rewards

We strengthen the employer-employee relationship by designing equitable, competitive, and sustainable compensation and rewards programs.

Multinational Benefits & Mobility

As Global Connectors, we provide solutions for you to manage your multinational workforce in a compliant, coordinated, strategic, administratively efficient, and cost-effective way.

Communications

A global leader in employee communication, we set the industry standard for excellence and innovation.

People Development & Insights

We help you understand your customers and your workforce to unlock value and performance.

Public Sector, Community & Education Consulting Practice:

Gallagher's Public Sector, Community & Education consulting practice **has completed more than 1,500 classification and compensation related studies for public entities, higher education, and similarly situated clients nationally**. We have extensive experience in developing and communicating compensation philosophy, designing and implementing market-aligned pay structures and career frameworks and developing job evaluation methods to maintain internal equity. We conduct benchmark analyses, including conducting custom-tailored salary surveys (if needed), and recommend appropriate administrative and procedural guidelines to maintain the compensation system. We ensure that our clients comply with applicable laws and regulations, such as the Fair Labor Standards Act (FLSA), the Americans with Disabilities Act (ADA), and Equal Employment Opportunity (EEO) standards and have pay systems that are appropriate for their organization and market strategy.

We have served our clients for more than 40 years across an array of strategic and value-adding HR services with **classification, compensation, pay equity, leadership search, and organizational design + span of control as our core specialties**.

Alliances

We have a strategic alliance with the Public Sector Human Resources Association (PSHRA), the National Public Employers Labor Relations Association (NPELRA), and the Colleges and Universities Professional Association for Human Resources (CUPA - HR) and have conducted a series of training seminars/workshops on compensation, classification, job evaluation, strategic HR, and employee benefits management throughout the nation in conjunction with these organizations. Gallagher Benefit Services also focuses on the higher education market.

Market Leading Thought Leadership and Strategic Direction

Our consultants have demonstrated leadership in the compensation and strategic HR fields by completing training and certifications from WorlDatWork, ERI, HRCI, Human Capital Institute, SHRM, and others in addition to serving as instructors and presenters for ICMA, CUPA-HR, NAPO, WorlDatWork, NACO, NPELRA, PSHRA and other regional and national associations.

Our thought leadership has been published and/or highlighted in *University Business*, *PSHRA News*, *American City and County*, *TalentCulture*, *Public Management*, *TLNT*, *Corporate Report Ventures*, *ERE*, *Corporate Board Member*, *Benefits Planner*, *WorlDatWork*, *Society of Industrial & Organizational Psychology*, and others.

As your Trusted Advisor we have additional information for your consideration based on your current focus.

You can expect a trusted advisor in Gallagher, not just a vendor focusing on only one aspect of your HR offerings. While there are numerous vendors that can provide HR consulting, our subject matter expertise is brought to life in the way we partner with our public sector entities and is what truly sets Gallagher apart. Our consulting style is proactive and collaborative. We strive to provide you with relevant information and partner with you to support informed decisions and anticipate the future. As experts in providing a broad spectrum of human resource and talent management capabilities our experience has shown us that many public sector entities conducting a compensation project may also need support in these key areas:

HR & Organizational Effectiveness

Think of our team both as a strategy partner, and as an **extension of your HR team** – providing expertise and additional capacity aligned with your specific HR needs, including strategic advisory, one-off projects, and fractional on-going HR solutions.

Here are some of the ways we can provide support:

- HR Policy Development
- Compliance
 - I-9 Reviews & Revisions, ACA Reporting & Compliance, Local, State & Federal Laws, Fair Labor Standards Act (FLSA) Compliance
- Career Transition Services
- Recruiting Services
- Payroll & HRIS Technology Services
 - Managed Payroll Solutions, Interim Emergency Support, State Tax Registrations, Year-End Support
- HR Technology Selection and Implementation
- Organizational Change Management
- HR Support
 - People Operations (Policies, Handbooks, JDs, Leave, Workplace Investigations)

Communication

You may encounter some cases that require communication such as sharing outcomes and findings of your needs assessment. Our award-winning Communications Practice is a global leader in employee communications.

We **will increase your business performance** by amplifying the entire employee experience through world leading employee communications.

Let us help you with:

- Benefits (Total Wellbeing) Communications
- **Compensation Communication**
- **Reward Communication**
- Retirement Communication
- **Internal Communication (IC)**
- Audit and Insight – Communication Effectiveness
- Organizational Change Communication
- Digital (Communication) Experience
- **Employee Value Proposition (EVP) Development and Communication**
- Personalized Portals
- Non-personalized portals
- Decision-support tools

We welcome the opportunity to further explore how we can partner with you in these critical areas.

Project Staffing

You will benefit from our team of specialists and experts, who bring a proven track record of:

- Designing and executing comprehensive compensation strategies
- Performing complex classification analyses
- Evaluating pay equity to ensure fair, competitive structures
- Delivering high-value strategic HR advisory services.

Many of our professionals have served as practitioners within the very sectors we support, granting us unique insight into real-world operational challenges. We combine rigorous data analytics, industry best practices, and innovative thinking to craft customized, forward-looking solutions aligned with each organization's strategic HR goals. By drawing from hands-on experience and leveraging an in-depth understanding of market trends, we will help you meet current standards and proactively prepare for an ever-evolving talent landscape.

Gallagher fosters a commitment to excellence, professionalism, integrity, collaboration, and urgency for each of our clients. With each unique client, Gallagher combines these principles to deliver client services customized specifically to meet your needs. Your Gallagher consulting team has years of experience consulting to public sector clients, including those with unionized and represented employees with a significantly diverse employee workforce with organizations nationwide, including a long history of serving California cities, counties, and public bodies. We have worked with more than 1,000 public sector and higher education clients over the past decade. Each member of Gallagher's public sector compensation consulting practice has achieved one or more of the following certifications and/or degrees:

- Certified Compensation Professional from WorldatWork
- Compensation Analyst Credential from Economic Research Institute
- IPMA-SCP from the Public Sector Human Resources Association
- PHR and/or SPHR from the Human Resources Certification Institute
- SHRM-CP and/or SCP from the Society for Human Resource Management
- SWP and HCS from the Human Capital Institute
- Master's degree or above, in Human Resources, Business Administration, and/or Organizational Psychology

PROJECT LEADERSHIP & LEADERSHIP SUPPORT

Executive Project Sponsor

ERIK SMETANA, Managing Director & National Practice Leader - 25+ years of experience

Erik manages operations and leads Gallagher's Public Sector, Community & Education Human Resources & Compensation Consulting practice. Erik's 25-plus-year work history has led him to serve in various diverse roles across human resource management, particularly in compensation and benefits, talent management and organizational development, people analytics, and employee relations and policy development. Erik has extensive experience in private and public sectors, working with an eclectic mix of dynamic organizations, including Fortune 500 companies across multiple industries, international not-for-profit organizations, membership associations, media outlets (e.g., NPR and NBC affiliates), institutions of higher education and research, and others. Before joining Gallagher, he served as the enterprise-wide Deputy CHRO and business unit CHRO with the University of Missouri System and with Vanderbilt University as the Executive Director of People & Engagement, leading, designing, and implementing compensation, employee learning, talent acquisition, and people-focused programs and initiatives. He has earned a variety of credentials over his career, including an MBA and MFA in Communication from Lindenwood University, SHRM-SCP and SPHR, SWP and HCS from Human Capital Institute, and a specialized certification in AI strategy from MIT.

As a consultant, Erik has been **engaged in more than 250 client projects with organizations ranging from cities and counties to state agencies to tribal nations and more including school districts, colleges and universities, special districts and authorities**, and other sector aligned entities in the provision of *compensation, classification, pay equity, organizational assessment, leadership coaching, performance management, and other strategic HR advisory services*.

Project Directors/Advisors

GEORG KRAMMER, MBA, SPHR, Managing Director, Practice Operations & Hub Leader – 25+ years of experience

Georg Krammer brings more than 25 years of management-level human resources experience with an emphasis in classification and compensation design, market salary studies, executive recruitment, organizational development, performance management, and employee relations; in the public sector and in large corporations as well as small, minority-owned businesses. After obtaining a Master of Arts in English and Russian and teaching credentials at the University of Vienna, Austria, Georg came to the United States to further his education and experience and attained his Master of Business Administration (MBA) from the University of San Francisco. Georg started his HR career at Wells Fargo's college recruiting department, moving on to HR management positions in the banking and technology consulting industries. After serving in the roles of HR Manager, Administrative Officer, and HR Director, he crossed over to the public sector. Georg's wide-ranging and deep human resources experience has prepared him to serve public sector clients varied needs. He has spearheaded several hundred classification, compensation, organizational and strategic planning studies for hundreds of cities, towns, counties, and special districts throughout California. Over the last decade, Georg has shared his vast knowledge at public sector industry conferences for organizations such as CALPELRA, CSDA, IPMA, and NPELRA. He has lectured and conducted workshops on subjects such as How to Conduct Classification and Compensation Studies, Performance Management, Succession Planning, and Recruitment. He holds the SPHR certification (Senior Professional in Human Resources).

TRACY MORRIS - MBA, SHRM-CP, Principal Consultant, Practice Operations & Hub Leader - 15+ years of experience

Tracy brings more than 15 years of experience in strategic human resources advisory services, beginning her career as a private sector practitioner before transitioning into K-12, public sector, and higher education consulting. She has deep specialization in compensation, classification, and total rewards, and partners with cities, counties, school districts, colleges and universities, and special districts to deliver defensible, data-driven solutions related to compensation structures, market benchmarking, pay equity, FLSA compliance, job architecture, and compensation policy development. Tracy is frequently engaged to support complex, high-impact initiatives requiring a balance of technical rigor, stakeholder engagement, and practical implementation guidance.

In her role at Gallagher, Tracy serves as a senior project leader and trusted advisor to executive leadership teams, HR directors, and governing bodies. She is known for translating complex data and regulatory considerations into clear, actionable recommendations that support informed decision-making and long-term sustainability. In addition to her client-facing work, Tracy serves as a Practice Operations & Hub Leader, where she leads process improvement, delivery standards, and systems optimization efforts across the consulting practice to improve efficiency, consistency, and client experience. She holds a bachelor's degree in Applied Economics and a Master of Business Administration from Texas Tech University and is a SHRM Certified Professional (SHRM-CP).

ZAK SHTULBERG, Principal Consultant, Practice Operations & Hub Leader - 15+ years of experience

Since starting as an HR consulting intern at Buck (now Gallagher) in 2012, Zak has been mission-driven and passionate about collaboration with clients and partners on transformative people, compensation, and other HR initiatives that improve the lives of employees and their communities. Projects have spanned a broad spectrum, including compensation strategy design, change management and communications, workforce planning, project management, analytics and technology enablement, and organization design, among many others. With both internal and external partners, he is recognized for blending strategic and technical advice with innovative analytics and technology and has grown as a trusted partner and subject matter expert in HR and compensation. Prior to starting his career, he earned a Bachelor of Science in Industrial and Labor Relations from Cornell University.

CHELSEA FREEMAN - Senior Consultant & Search Leader- 20+ years of experience

Chelsea leads the search function within Gallagher's Public Sector, Community & Education Human Resources & Compensation Consulting practice. Chelsea's 20-plus-year professional background spans both the private and public sectors, with deep expertise in executive recruitment, classification and compensation, HR operations, talent strategy, and organizational effectiveness. Her experience includes working with complex organizations across higher education, municipal government, and other public-sector entities operating within highly regulated and shared-governance environments.

Chelsea began her Human Resources career in private-sector manufacturing before transitioning into public sector, where she developed a strong foundation in workforce strategy, compliance, and organizational consulting. Prior to joining Gallagher, she served as the Classification, Compensation, and HR Operations Manager at California State University, Monterey Bay, where she led the development and implementation of a comprehensive compensation philosophy for staff and faculty. In this role, Chelsea was responsible for classification and reclassification programs, advising on collective bargaining agreements, implementing HR process

improvement initiatives, and providing ongoing consultation to executive leadership on organizational design, recruiting strategy, equitable hiring practices, and Diversity, Equity, and Inclusion efforts.

Since joining Gallagher, Chelsea has integrated her classification and compensation expertise with recruitment and marketing experience to deliver a full-service executive search approach. She currently manages full-cycle executive recruitments for public-sector clients, including cities, counties, special districts, and higher education. Chelsea is known for her consultative, equity-driven leadership style, emphasizing transparency, compliance, inclusive outreach, and strong alignment with organizational mission, culture, and governance structures. Chelsea earned her B.A. degree in Communications from Sonoma State University.

Project Managers

JAIME PARKER - Senior Consultant & Project Manager - 15+ years of experience

Jaime is a Senior Consultant and Project Manager with more than 15 years of experience, including over 12 years specializing in compensation, classification, and organizational effectiveness across higher education and public-sector organizations. She brings a strong blend of practitioner and consulting experience, having spent fifteen years in higher education roles within Human Capital Services and the Office of Institutional Effectiveness at Kansas State University before joining Gallagher nearly four years ago. She serves as a trusted advisor and project manager, leading complex compensation and classification studies, market benchmarking, job architecture and leveling initiatives, organizational assessments, FLSA exemption analyses, and executive, and board-level reporting. Jaime helps organizations advance equitable, competitive, and sustainable workforce strategies. She holds a bachelor's degree in accounting from Kansas State University and earlier in her career held leadership roles in the banking industry.

MAGGIE WILLIAMS-DALGART, Senior Consultant & Project Manager – 20+ years of experience

Since joining Gallagher in 2021 Maggie has been providing a wide range of consulting services, including classification analysis and development, custom salary and benefits surveys, and pay plan design for various public sector agencies, including cities, counties, special districts, community colleges, and transit agencies. Maggie provides strategic advising and understands the importance of engaging key stakeholders throughout the study. Prior to joining Gallagher, Maggie spent 20 years in human resources for local government. In addition to classification and compensation expertise, Maggie's experience includes collective bargaining, labor contract administration and labor costing, policy development, and recruitment and selection. Maggie served as President of CalPACS from 2018 - 2021, a regional internet-based salary and benefits survey website for local agencies in Southern California. Maggie holds a bachelor's degree in history of public policy from the University of California, Santa Barbara and a master's degree in public administration from the University of Colorado, Colorado Springs.

MIKE HARARY, Senior Consultant & Project Manager – 40+ years of experience

Mike Harary possesses over 40 years of municipal HR management experience, including serving as a Human Resources Director for two municipalities in Southern California. He has been involved in all aspects of Human Resources for the cities of La Mirada, Orange, Westminster, and Downey, including serving as Chief Labor Negotiator, managing recruitment and selection processes for all types of municipal government positions, handling employee benefits functions, responding to labor and employee relations issues, complying with labor laws, conducting personnel investigations, and managing a variety of general human resources functions. He has also served as a consultant with Koff and Associates/Gallagher since 2019, managing numerous classification and compensation studies for multiple cities, counties, and special districts throughout California. Mike has a bachelor's degree in business administration emphasizing in Human Resources Management from California State University, Long Beach, and a Master of Business Administration, also from Cal State Long Beach. Mike will provide managerial project support throughout this effort, including classification analysis, interviews with employees and management, compensation data collection and analysis, internal job analysis, development of recommendations, and implementation strategies.

PRACTICE OPERATIONS

CHRISTINE NICHOLS - Operations Support Specialist - 30+ years of experience

Christine joined Gallagher in 2023, bringing more than 30 years' experience in Operations Support to the practice. Prior to joining Gallagher, she worked in the private sector for a Global staffing company. In her role as Operations Support for the practice, Christine ensures that all administrative processes across the team run efficiently and effectively, providing seamless client experience from proposal to project closure. She plays an integral part in the contract review process, follows up on client invoices & vendor payments, pulls data from a variety of internal & external systems and coordinates communications with other Gallagher departments. Christine is responsible for managing all RFPs, web inquiries & client referrals to the practice. She also handles all the scheduling of internal & external meetings for the practice, as well as review & audit of practice expenses.

PROJECT STAFF SUPPORT

ALYSSA THOMPSON	Senior Consultant & Client Liaison	<i>25+ years of experience</i>
KARI MERCER	Senior Consultant & Client Liaison	<i>15+ years of experience</i>
RENATE TINER	Senior Consultant & Client Liaison	<i>15+ years of experience</i>
CHARMAIN KOHLER	Consultant II & Client Liaison	<i>10+ years of experience</i>
SHILOH VENABLE	Consultant II & Client Liaison	<i>15+ years of experience</i>
CINDY HARAY	Consultant	<i>35 years of experience</i>
JANNA DINKELSPIEL	Consultant	<i>15+ years of experience</i>
KELLY BARNS	Consultant	<i>20+ years of experience</i>
MONICA GARRISON-REUSCH	Consultant	<i>20+ years of experience</i>
SUZY PARKER	Consultant	<i>5+ years of experience</i>
MARY GAUTHE	Senior Associate Consultant	<i>5+ years of experience</i>
CARISSA MARTO	Associate Consultant	<i>5+ years of experience</i>
KATHY ELLER	Associate Consultant	<i>10+ years of experience</i>
KELSI ARNEY	Associate Consultant	<i>8+ years of experience</i>
LAUREN GRANT	Associate Consultant	<i>10+ years of experience</i>
LYNDA GUERRA	Associate Consultant	<i>5+ years of experience</i>
ERIC SWIDLER	Senior Analyst	<i>5+ years of experience</i>

Approach to the Project

Our practice takes a thoughtful and collaborative approach to all our client engagements, where we work to ensure our efforts are ones which demonstrate how the Public Sector, Community & Education practice **C.A.R.E.S.** - collaborate/consult, advise/assess, recommend/resource, engage/endorse, and strategize/serve - about our clients and their needs. To that end, our project approach starts with our process and client communications.



Our extensive experience has resulted in a comprehensive understanding of the scope of work described by the District. Additionally, we understand the importance of this study as one of many strategies to address current human resources issues and appreciate the delicate nature of public sector spending. Below are some key considerations we have in this type of project, followed by our approach to the areas identified by the District, our detailed work plan, and the estimated project timeline.

Key Considerations:

Leadership Support: Effective compensation reform requires consistent, visible leadership commitment at multiple organizational levels. We establish a leadership accountability structure that includes executive sponsors, department champions, and implementation teams with clearly defined roles. Leaders must actively communicate the program's importance, address concerns directly, and visibly support the process through each phase. We provide leaders with focused messaging tools and data points to effectively advocate for changes. Without this multi-level support structure, even technically sound compensation systems often encounter significant resistance during implementation.

Benefit to you: *This ensures leadership alignment and visible support, which are critical for successful implementation and stakeholder buy-in.*

Internal Fairness and Equity: Our approach balances external market competitiveness with internal equity through comprehensive job analysis techniques. We conduct detailed comparisons across job families, reporting relationships, and responsibility levels to ensure logical compensation relationships. This includes specialized analysis of career progression paths and appropriate differentials between supervisory and non-supervisory roles. We implement specific methodologies to address compression issues, particularly between long-service employees and new hires with market-driven starting salaries. Our process identifies and remedies historical inequities while establishing defensible rationales for pay differences based on skills, responsibilities, and performance factors.

Benefit to you: *This will allow us to identify and remedy historical inequities for the District, while establishing defensible rationales for pay differences based on skills, responsibilities, and performance factors.*

Appropriate Timelines: We develop realistic project schedules based on organizational complexity and resources. This includes adequate time for comprehensive job documentation, employee input, leadership review cycles, and implementation planning. A typical comprehensive compensation project requires 6+ months for proper execution, including 2-3 months for thorough job analysis, 1-2 months for market research, and 2-3 months for implementation planning, noting that this work may happen concurrently across the life of the engagement. Accelerated timelines often compromise data quality and stakeholder buy-in, leading to implementation challenges and future rework. We establish appropriate checkpoints and quality controls to ensure thoroughness while maintaining momentum.

Benefit to you: *A well-paced process reduces risks, enhances data quality, and ensures engagement throughout the project.*

Data-Driven with Human Oversight: Our methodology combines rigorous data collection with expert interpretation. We utilize multiple validated market sources appropriate for your sector, geographic region, and organizational characteristics. All job matches undergo multi-level validation checks to ensure accurate comparisons. This empirical foundation is then contextualized through structured consultant review panels that consider institutional history, strategic priorities, and unique operational factors as shared and iterated by our clients. We document both the data-driven recommendations and any exceptions to provide a clear, defensible audit trail. This balanced approach ensures decisions are not rigidly algorithmic while maintaining system integrity. Gallagher does not perform FOIA or similar requests in the collection of market data.

Benefit to you: This ensures data-backed decisions are tailored to your unique organizational needs, with a clear and defensible audit trail. Combining data with expert insights allows for strategic decisions that align with the District's organizational goals.

Clear and Consistent Communication: We develop compensation structures and classification frameworks with inherent clarity, using straightforward job leveling frameworks, transparent progression criteria, and consistent application of compensable factors. Communication materials are tailored to different stakeholder needs—executive summaries for leadership, detailed implementation guides for HR professionals, and practical explanation tools for managers and employees. We create accessible resources explaining compensation philosophy, range structure, placement methodology, and future growth opportunities. Systems are designed with straightforward administration requirements that do not require specialized expertise for day-to-day management.

Benefit to you: Clear communication builds trust, ensures understanding across all District levels, and simplifies system administration.

Compression Planning and Analysis: Our implementation approach includes detailed financial modeling that identifies potential compression scenarios before placement decisions are finalized. We analyze the distribution of current salaries against proposed ranges to identify employee clusters and gaps requiring special attention. Implementation options are developed with multi-year cost projections, including various phasing alternatives to balance budget constraints with equity requirements. Special focus is given to departments with significant longevity differences and areas with recent hiring at market rates. This proactive approach prevents creating new inequities while addressing existing compression issues within available resources.

Benefit to you: Proactively addressing compression issues helps maintain equity, improve retention, and align pay with organizational priorities.

Our Approach:

Comprehensive Job Documentation Review

Our methodical approach to position documentation begins with a thorough review of the District's existing job descriptions to ensure both internal consistency and regulatory compliance. This analysis includes:

- **Documentation Structure Assessment**
Systematic evaluation of job descriptions through our 15-point documentation checklist, assessing critical elements including essential functions, ADA compliance language, FLSA classification support, and competency requirements.
- **Functional Accuracy Verification**
Application of our validation process to ensure documentation reflects actual work performed. For positions where current documentation (job descriptions or other supporting materials) lacks sufficient clarity or detail, we may implement our Job Analysis Questionnaire (JAQ) methodology. This targeted approach uses our structured JAQ format to capture essential job elements more accurately than traditional methods. The JAQ process is selectively applied only where existing documentation fails to clearly define:
 - Work complexity and decision-making authority
 - Technical skill requirements and application
 - Supervisory/management responsibilities
 - Problem-solving requirements and organizational impact
 - Minimum qualification requirements
- **Regulatory Compliance Review**
Application of our compliance checklist to ensure job documentation satisfies requirements across multiple regulatory

frameworks, including ADA, EEOC, FLSA, and other applicable laws. This process identifies specific compliance gaps and develops appropriate language solutions.

Market Comparison Analysis

Our market analysis methodology combines multiple data sources to create a comprehensive competitive assessment:

- **Benchmark Position Selection**
Identification of benchmark positions (typically 60-65% of job classifications), mapping, and communication of process to ensure:
 - Representation across all major job families and levels
 - Focus on positions with reliable and abundant market data
 - Inclusion of mission-critical and hard-to-fill positions
 - Coverage of positions with known compensation challenges
 - Consistency and understanding of roles relative to Gallagher's benchmark mapping process
- **Comprehensive Market Data Collection**
Multi-source data approach combining:
 - Published survey data from industry-specific and general compensation surveys
 - Custom survey data collected from selected competitor organizations
 - Current labor market information on compensation trends
- **Total Rewards Analysis**
Complete competitive assessment including:
 - Base compensation positioning relative to defined market
 - Variable pay practices and prevalence
 - Benefits package evaluation and competitiveness leveraging Gallagher's industry-leading National Benchmark Survey data
 - Work arrangement flexibility and other non-monetary elements
 - Employer/employee cost-sharing analysis for benefits programs

Compensation Structure Development

Our compensation structure development process transforms market and internal data into an integrated framework that supports organizational objectives:

- **Structure Design**
Development of grade and range structures through data analysis:
 - Analysis of market data to establish market-responsive relationships
 - Integration of internal equity requirements into structure design
 - Modeling of various structure options (typically 2-3 alternatives)
 - Review of position distribution across proposed structures
- **Position Placement**
Allocation of positions to appropriate grades based on:
 - Internal equity values established through job evaluation
 - Market position requirements for critical job families
 - Organizational design considerations and reporting relationships
 - Career progression pathway requirements
- **Implementation Analysis**
Financial analysis to evaluate implementation approaches:
 - Individual employee placement modeling based on defined criteria
 - Development of up to three implementation scenarios
 - Compression/inversion identification and remediation planning

System Sustainability Plan

Our approach ensures the District can maintain and evolve the compensation system independently:

- Comprehensive Documentation & System Integration
Development of system documentation and transfer of data in formats compatible with the District's HRIS system, enabling smooth integration with existing technology.
- Administrative Knowledge Transfer
Implementation of our training approach:
 - Thorough training for HR staff on system maintenance
 - Development of administrative tools and decision support materials
 - Creation of position evaluation guides and procedures
 - Establishment of ongoing monitoring and adjustment processes
- Long-term Maintenance Planning
Development of a sustainable maintenance approach:
 - Annual review methodology and timeline
 - Market monitoring recommendations and data sources
 - Position evaluation guidelines for new or changed positions
 - Budget planning guidance for annual structure adjustments

Our final deliverable will include a comprehensive report detailing methodologies, findings, and recommendations, along with all necessary implementation tools and documentation. This deliverable will provide the District with both immediate implementation guidance and long-term direction for compensation management.

Benefit to you: Our comprehensive approach provides the District with a fully customized, equitable, and sustainable compensation system that aligns with organizational priorities, ensures regulatory compliance, addresses internal equity and market competitiveness, and equips HR staff with the tools and knowledge to maintain and evolve the system independently over time.

Work Plan:

The work plan proposed is designed to provide the flexibility necessary to attract, retain, and motivate employees to provide quality services and ensure the system is not an administrative and/or costly burden to the District now or in the future. Gallagher has integrated the Scope of Services into our phased approach and deliverables to address the District's requests. All phases will require that designated District - team members and Gallagher have ongoing status meetings to explain the process, review the project's progress, review draft materials, address questions, and discuss next steps.



The phased work plan is as follows:

PHASE 1: STRATEGIC ALIGNMENT, PROJECT INITIATION, & STUDY ADMINISTRATION

Our engagement begins with a comprehensive strategic alignment phase designed to establish clear governance structures and critical success parameters:

Executive Strategy & Initiation

Convene a strategy session with executive leadership to confirm organizational priorities and talent philosophy, align compensation objectives with business and workforce needs, identify key risks and constraints, and confirm project scope, decision cadence, and success criteria.

Governance & Project Management

Establish a governance model—typically a steering group and a working team—with clearly defined roles, decision rights, and escalation pathways; we implement milestone tracking and issue/risk management practices to maintain project transparency and momentum.

Current State Diagnostic

Review policies, job documentation, organizational structures, and related practices to assess the current compensation philosophy and classification approach, identify strengths and gaps against relevant standards, and synthesize initial findings to guide downstream design decisions.

Stakeholder Engagement & Change Planning

Design a communications approach that establishes a consistent narrative, identifies key audiences and spokespeople, sets feedback mechanisms, and defines the cadence and channels needed to support understanding, buy-in, and readiness.

Employee Orientation

Deliver project overview sessions to clarify objectives and roles, provide consistent messaging, and gather initial input that informs subsequent phases.

Virtual Meetings are included. On-site visits are available at an additional cost to the District.

PHASE 2: CLASSIFICATION & CAREER FRAMEWORK REVIEW + DESIGN

Conduct of meetings with HR/leadership/project team at critical intervals to discuss deliverables. Some components of Phase 2 will overlap with Phase 1.

Our methodology leverages leading practice and analytical frameworks refined through implementations across hundreds of client engagements:

Position and Job Content Review

We assess existing job documentation and related materials to develop a clear understanding of role scope, responsibilities, and organizational context. Our review approach is scalable and informed by the quality and completeness of existing documentation. Where additional clarity is required, we may apply targeted job analysis techniques—such as structured questionnaires, interviews, or manager validation—to ensure job content is accurately represented and consistently documented. Documentation standards and review protocols are established to support defensibility and ease of administration.

Data Validation and Stakeholder Input

To support accuracy and alignment, we incorporate appropriate levels of manager and subject-matter expert validation. This may include structured reviews, targeted discussions, or follow-up clarification for selected roles. Throughout this process, we apply data quality checks and normalization practices to ensure information is consistent, comparable, and suitable for downstream classification and compensation analyses.

FLSA and Regulatory Considerations

As part of the classification review, we evaluate positions for FLSA exemption status and related compliance considerations using a structured, defensible methodology. This review identifies potential areas of risk, documents exemption rationale, and informs recommendations for addressing any compliance concerns in a practical and sustainable manner.

Classification and Career Framework Design

Using the validated job information, we develop or refine the District's classification architecture and career framework. Our approach is grounded in leading practices and tailored to the organization's size, complexity, and workforce strategy. Activities may include defining job families, clarifying role distinctions, establishing career progression pathways, and evaluating internal alignment across functions. We test and refine the emerging structure to support internal equity, organizational clarity, and long-term usability.

Draft recommendations are reviewed with the project team to gather feedback and confirm alignment with strategic and operational objectives. Based on this input, we refine and finalize the classification and career framework to ensure it is practical, coherent, and ready to support compensation design and implementation in subsequent phases.

Position Documentation Development

As the classification architecture is finalized, we develop standardized position documentation to ensure continuity, consistency, and long-term usability across the organization. Job descriptions are a foundational element of effective workforce management, supporting recruitment, training and coaching, performance evaluation, accountability, compensation administration, and regulatory compliance. Our approach emphasizes clarity, objectivity, and alignment with the approved classification and career framework, ensuring that each position is accurately represented and consistently documented.

Using validated job content and leading practices, we develop ADA-compliant job descriptions that clearly articulate essential duties, expected outcomes, and role responsibilities, as well as how work is performed and the knowledge, skills, and competencies required for successful performance. Position requirements are articulated using competency-based frameworks to support consistency across job families while allowing for appropriate differentiation by level and function. Each job description includes clearly defined essential functions, standardized education and experience requirements, and documentation of physical and environmental conditions to support defensibility and compliance.

To provide organizational context and improve usability, we develop job family introductions that clarify the scope, purpose, and progression of roles within each family. Job descriptions are drafted in a staggered manner by job family, allowing for focused review and refinement. Management review and validation are incorporated to confirm accuracy, alignment with operational realities, and clarity of expectations. Based on this feedback, we refine and finalize job descriptions to ensure they are practical, coherent, and ready to support compensation design and implementation in subsequent phases.

PHASE 3: COMPENSATION, BENCHMARKING & MARKET ANALYSIS

Our data-driven approach combines deep market knowledge with sophisticated analytical techniques:

Market Analysis Strategy

Define relevant labor markets and peer groups, map roles to benchmark positions based on work performed, select appropriate survey sources and/or custom data approaches, and establish data treatment assumptions such as aging and geographic differentials.

Market Data Collection

Compile data from selected published surveys and, as appropriate, conduct custom data collection to address unique or hard-to-match roles; we monitor participation, validate and normalize inputs, and apply agreed adjustments to build a defensible dataset.

Data Integration & Competitive Analysis

Integrate published and custom sources, perform statistical checks and outlier treatment, develop market reference points or market lines, and assess competitiveness, internal equity, and pay compression to inform structure design.

Compensation Structure Design

Model one or more structure alternatives aligned to the classification approach, test range spreads and overlaps, evaluate impacts relative to current placements, and refine recommendations using financial and operational considerations; final structure recommendations are tailored to the Client's objectives and constraints.

PHASE 4: IMPLEMENTATION STRATEGY, FINAL REPORTS, & SUSTAINABILITY PLANNING

Our approach ensures successful implementation and long-term program sustainability:

Financial Impact & Scenario Modeling

Model individual and aggregate financial impacts and develop practical implementation scenarios to balance competitiveness, equity, and budgetary considerations.

Implementation Strategy & Change Readiness

Outline a phased implementation approach with exception handling protocols, guidance for red-circle/green-circle situations, and communications planning to support a smooth rollout.

Policies, Procedures & Governance

Document or refine compensation policies, administrative procedures, decision authorities, and process flows to support consistent application and ongoing maintenance of the program.

Tools, Training & Knowledge Transfer

Provide evaluation/pricing tools, manager decision-support resources, and employee education materials as appropriate, and deliver administrator training to build internal capability for sustained program stewardship.

Executive Review & Close-Out

Present recommendations to leadership, facilitate decision-making on the preferred path, incorporate final feedback, deliver project materials, and transition to post-project support.

PHASE 5: POST-PROJECT SUPPORT & OPTIONAL ONGOING SERVICES

Post-Implementation Support

We provide up to ten (10) hours of advisory and technical support during the six months following project close to address emergent issues, refine tools based on early use, and document lessons learned that inform ongoing practices.

Ongoing Services (Optional)

Upon request, we offer ad-hoc support such as job evaluation, market pricing, job documentation updates, and trend analysis, typically delivered with a two- to four-business-day turnaround depending on scope and volume.

Project Timeline

The following is an estimate to complete each phase by month for conducting a more comprehensive job description update **and** total compensation study. We will discuss the details of each phase during Phase 1 and identify specific deadlines for the project at that time. We will conduct frequent conference calls with the District to ensure the schedule is monitored throughout the project. In today's world, speed is particularly important. However, given the significance of this project, it is just as important for District officials, department heads, and employees to have sufficient time to review and approve the recommendations of Gallagher and to ensure proper communications occur. We have prepared a timeline to ensure the District has the work products in an expeditious manner. Our phases run concurrently; in that we do not wait until the full completion of a phase to begin another phase. We are prepared to commence the work within two weeks of receiving your authorization to proceed.

PHASE	MONTH				
	1	2	3	4	5
Strategic Alignment, Project Initiation, & Study Administration					
Job Description Review & Updating					
Compensation, Benchmarking & Market Analysis					
Implementation Strategy, Final Reports, & Sustainability Planning					
Post-Project Support & Optional Ongoing Services	Up to 10 hours of direct support for the 6 months following project closure				

The following is an estimate to complete a total compensation only study:

PHASE	MONTH			
	1	2	3	4
Strategic Alignment, Project Initiation, & Study Administration				
Compensation, Benchmarking & Market Analysis				
Implementation Strategy, Final Reports, & Sustainability Planning				
Post-Project Support & Optional Ongoing Services	Up to 10 hours of direct support for the 6 months following project closure			

The following is an estimate to complete a base salary only study:

PHASE	MONTH		
	1	2	3
Strategic Alignment, Project Initiation, & Study Administration			
Compensation, Benchmarking & Market Analysis			
Implementation Strategy, Final Reports, & Sustainability Planning			
Post-Project Support & Optional Ongoing Services	Up to 10 hours of direct support for the 6 months following project closure		

Cost Proposal

We believe that our methodology and implementation success rate are attributable to the significantly greater level of contact we have with employees, employee representation, management, and the governing body. The time we commit to working with employees (orientations and briefings, meetings with employees via personal interviews, sharing of compensation survey data, etc.) results in significantly greater buy-in throughout the process.

It has been our experience that the time, money, and resources invested in stakeholder communication throughout the study are time, money, and resources saved during implementation. Our goal is to conduct each study the right way the first time.

To create efficiency and cost savings for our clients, as well as operating as green of an organization as possible, we often conduct our studies virtually. Our cost proposal assumes that all meetings and presentations will be conducted virtually/remotely and no onsite travel to District offices will occur. Should the District desire onsite meetings, our per diem cost for onsite meetings, based on travel time and market rate travel costs, is outlined below. The table below outlines the price per phase.

Base Salary Study

Phase	Fees
PHASE 1: Strategic Alignment, Project Initiation, & Study Administration <i>Includes virtual meetings and ongoing project management meetings throughout.</i> <i>On-site meetings are available at an additional cost*</i>	\$2,500
PHASE 2: Compensation, Benchmarking & Market Analysis	\$15,000
PHASE 3: Implementation Strategy, Final Reports, & Sustainability Planning <i>Includes virtual meeting; On-site meetings are available at an additional cost *</i>	\$2,500
PHASE 4: Post-Project Support & Optional Ongoing Services	\$0; annualized ongoing support services available
TOTAL COST (Including all tasks) will not exceed: \$20,000	

*On-site meetings are available at an additional cost.

Total Compensation Study

Phase	Fees
PHASE 1: Strategic Alignment, Project Initiation, & Study Administration <i>Includes virtual meetings and ongoing project management meetings throughout.</i> <i>On-site meetings are available at an additional cost*</i>	\$2,500
PHASE 2: Compensation, Benchmarking & Market Analysis	\$21,250
PHASE 3: Implementation Strategy, Final Reports, & Sustainability Planning <i>Includes virtual meeting; On-site meetings are available at an additional cost *</i>	\$3,750

PHASE 4: Post-Project Support & Optional Ongoing Services	\$0; annualized ongoing support services available
TOTAL COST (Including all tasks) will not exceed: \$27,500	

**On-site meetings are available at an additional cost.*

Total Compensation Study Plus Job Description Updates

Phase	Fees
PHASE 1: Strategic Alignment, Project Initiation, & Study Administration <i>Includes virtual meetings and ongoing project management meetings throughout.</i> <i>On-site meetings are available at an additional cost*</i>	\$2,500
PHASE 2: Job Description Updates	\$7,500
PHASE 3: Compensation, Benchmarking & Market Analysis	\$21,250
PHASE 4: Implementation Strategy, Final Reports, & Sustainability Planning <i>Includes virtual meeting; On-site meetings are available at an additional cost *</i>	\$3,750
PHASE 5: Post-Project Support & Optional Ongoing Services	\$0; annualized ongoing support services available
TOTAL COST (Including all tasks) will not exceed: \$35,000	

**On-site meetings are available at an additional cost.*

Our study costs are derived directly from estimating the number of hours required to perform the work and the level of the consultant charged with performing it. Gallagher typically bills monthly up to the maximum of each deliverable. Please note that, as phases sometimes run concurrently, a phase may not be completed at the time it is billed. All expenses are included in this quote.

Should the District wish to have additional on-site presentation days or meetings, the estimated cost would be \$4,000 per day. Any change to the scope of the assignment (beyond what is described above), as well as other work requested beyond this assignment, will be billed based on our hourly rates unless we mutually agree on a fixed fee for the additional work.

Optional Ongoing Services:

Service	Fees
Pay Equity Review and Dashboard <i>Multi-regression analysis of employee demographics related to pay, additional analysis using Gallagher's Compensation Alignment Index, and the provision of a post-study dashboard to support reporting and internal communication needs.</i>	\$7,500
Ongoing Ad-Hoc Review <i>Includes job evaluation, single role market pricing, and job description development, classification review, PDQ/JAQ review</i>	\$13,500* per annum** for up to 25 requests
Annual Trend Memo <i>Includes market and sector movement memorandum to inform annual budget planning, structure adjustments, and understanding of market trends</i>	\$3,500 per annum**
Market Benchmarking Tool (Gallagher CompSight) <i>Includes client access to cloud-based market benchmarking tool and the development/facilitation of an annual custom survey to provide real-time market data to the client organization in between large-scale studies</i>	\$45,000 per annum (includes tool and survey)***

*price may be modified (up or down) based on anticipated client volume

**annual cost discounted by \$1,000 and held flat (i.e., no rate increases) for multi-year (2 or more) service agreements

***annual cost discounted to \$34,500 per annum for multi-year (2 or more) service agreements

Contractual Considerations

The Parties expressly agree that this Agreement allows for cooperative procurement. Any public body (health or educational) may utilize this Agreement if authorized by Gallagher in writing. Participation in this cooperative procurement is strictly voluntary. If authorized by Gallagher in writing, this Agreement may be extended to certain entities to purchase certain services provided by Gallagher at fees in accordance with this Agreement (each, a "Participating Entity"). Participating Entities will purchase services directly from Gallagher by and through this Agreement as if it were the named 'Client' hereunder. Gallagher shall look to the Participating Entity and the Participating Entity shall look to Gallagher in the event of invoicing, payments, and/or contractual disputes in accordance with the terms set forth herein. The named Client, nor any other Participating Entity, shall be held jointly and severally liable for any costs or damages in the event of a dispute between Gallagher and that Participating Entity. By entering into this Agreement, no Participating Entity is precluded from other agreements or competitive processes, as the case may arise.

Additionally, each Party or its Affiliates may execute a Statement of Work pursuant to this Agreement with the other Party or any of such other Party's Affiliates, and each such Statement of Work will form a separate contract between the signatory parties thereto. Where the parties to a Statement of Work are an Affiliate of Gallagher or Client, unless context dictates otherwise, references within any provisions of this Agreement to "Gallagher" or "Company" that are incorporated into such Statement of Work shall, for the purposes of that Statement of Work, be construed as a reference to Gallagher's or Client's respective Affiliate that is the signatory to such Statement of Work. "Affiliate" as it relates to a Party means any entity that Controls, is Controlled by, or is under common Control with such Party. "Control" means the ability, whether directly or indirectly, to direct the affairs of another by means of ownership, contract or otherwise.

Gallagher is pleased to submit this proposal to the District. While this proposal is not meant to constitute a formal offer, acceptance, or contract, notwithstanding anything to the contrary contained in the proposal, Gallagher is submitting this proposal with the understanding the parties would negotiate and sign a contract containing terms and conditions that are mutually acceptable to both parties.

It is our practice to provide the coverage below in lieu of the CCTA contract insurance language. We therefore propose to replace the insurance language in the RFP's sample agreement with coverage language provided by Gallagher as follows:

Gallagher shall at all times during the term of this Agreement and for a period of two (2) years thereafter, obtain and maintain in force the following minimum insurance coverages and limits at its own expense:

- Commercial General Liability (CGL) insurance on an ISO form number CG 00 01 (or equivalent) covering claims for bodily injury, death, personal injury, or property damage occurring or arising out of the performance of this Agreement, including coverage for premises, products, and completed operations, on an occurrence basis, with limits no less than \$2,000,000 per occurrence;
- Workers Compensation insurance with statutory limits, as required by the state in which the work takes place, and Employer's Liability insurance with limits no less than \$1,000,000 per accident for bodily injury or disease. Insurer will be licensed to do business in the state in which the work takes place;
- Automobile Liability insurance on an ISO form number CA 00 01 covering all hired and non-owned automobiles with limit of \$1,000,000 per accident for bodily injury and property damage;
- Umbrella Liability insurance providing excess coverage over all limits and coverages with a limits no less than \$10,000,000 per occurrence or in the aggregate;
- Errors & Omissions Liability insurance, including extended reporting conditions of two (2) years with limits of no less than \$5,000,000 per claim, or \$10,000,000 in the aggregate;
- Cyber Liability, Technology Errors & Omissions, and Network Security & Privacy Liability insurance, including extended reporting conditions of two (2) years with limits no less than \$2,000,000 per claim and in the aggregate, inclusive of defense cost; and
- Crime insurance covering third-party crime and employee dishonesty with limits of no less than \$1,000,000 per claim and in the aggregate.
- All commercial insurance policies shall be written with insurers that have a minimum AM Best rating of no less than A-VI, and licensed to do business in the state of operation. Any cancelled or non-renewed policy will be replaced with no coverage gap, and a Certificate of Insurance evidencing the coverages set forth in this section shall be provided to Client upon request.

* * * * *

Thank you for this opportunity to offer our services. Please feel free to contact us at any time if you have any questions or require additional information. We look forward to hearing from you soon.

Sincerely,



Georg S. Krammer
Managing Director, Practice Operations & Hub Leader
510.274.2760 | Georg_Krammer@ajg.com



Erik Smetana
Managing Director & National Practice Leader
314.494.4849 | Erik_HenrySmetana@ajg.com

Appendix 1: Publications & Conference Presentations

Over the past 36 months, your Gallagher Public Sector, Community & Education consultants have actively contributed to the discourse through a variety of publications and conference presentations. These efforts underscore our commitment to thought leadership and our dedication to advancing industry practices. This section highlights our key publications and presentations, showcasing our expertise and the value we bring to our clients and partners.

Gallagher - Total Rewards and Trends in Higher Education

Arthur J. Gallagher & Co. | February 2026

CALPELRA Conference

California Public Employers Labor Relations Association | September 2025

VAPSHRA Conference

Virginia Public Sector HR Association | September 2025

NCASG Conference

National Compensation Association of State Governments | September 2025

K-12 Emerging Trends & Risks for this School Year (Webinar)

Arthur J. Gallagher & Co. | July 23, 2025

Navigating What's Next: Revenue, Risk, and the Future of College Athletics (Webinar)

Arthur J. Gallagher & Co. | May 8, 2025

FMLA Bootcamp: Leave Management Trends, Paid Time Off & Sick Banks (Webinar)

myBenefits Channel | April 24, 2025

How Student-Athlete Pay Can Boost Students, Sports, and Institutional Success

Arthur J. Gallagher & Co. - News & Insights | February 26, 2025

Shaping the Journey to Fair Pay for Student Athletes

Arthur J. Gallagher & Co. - News & Insights | Jan 15, 2025

Competitive Compensation Structures for Higher Ed Institutions and Systems

CUPA-HR presentation | September 2024

Public Sector: Trends in Compensation & HR

Public Sector HR Association (PSHRA) - Virginia Chapter - State Conference | September 24, 2024

How a Compensation Philosophy Can Boost Employee Engagement in the Public Sector

Arthur J. Gallagher & Co. - News & Insights | Jul 2, 2024

Driving Public Sector Excellence: The Power of Job Architecture and Career Frameworks

Arthur J. Gallagher & Co. - News & Insights | May 2, 2024

Promoting Excellence and Pay Equity: The Benefits of Merit Pay in Higher Education

Arthur J. Gallagher & Co. - News & Insights | April 8, 2024

Recruitment and Retention Opportunities within the Public Sector & Public Safety

National Association of Police Organizations - Retirement & Benefits Symposium | January 29, 2024

How a Coaching Leadership Style Unleashes Human Potential at Work

TalentCulture | Jan 16, 2024

Does Your HR Strategy Leverage Organizational Competencies

TalentCulture | June 23, 2023

Workforce and Succession Planning Can Help Stem Higher Education Employee Turnover

Arthur J. Gallagher & Co. - News & Insights | May 15, 2023

Looking Beyond the "Great Resignation" and Planning for a Great Future

International Public Management Association for Human Resources (IPMA-HR) | September 27, 2022

Leverage Compensation Strategies to Attract and Retain Top Public Talent (Conference Presentation)

IPMA-HR Central Region Conference, ICMA

Leverage a Holistic People Strategy to Help Higher Education Employers Face the Future with Confidence

Arthur J. Gallagher & Co. - News & Insights | July 15, 2022

Prepare Now for FLSA Rule Changes Coming Soon

Arthur J. Gallagher & Co. - News & Insights | March 15, 2022

Appendix 2: FLSA Compliance Methodology

Our 7-Point FLSA Compliance Methodology provides a structured, defensible approach to determining the appropriate exemption status of each position within your organization. This systematic framework goes beyond basic salary thresholds to ensure proper classification according to the most current Department of Labor regulations and case law interpretations.

1. Salary Basis Assessment

- Evaluation of compensation structure against current FLSA minimum salary requirements
- Analysis of pay practices for compliance with salary basis test requirements
- Review of compensation delivery methods and frequency
- Assessment of permissible and impermissible deductions
- Identification of salary basis vulnerabilities and remediation recommendations

2. Primary Duty Analysis

- Quantitative time allocation analysis across job functions
- Relative importance assessment of exempt vs. non-exempt functions
- Freedom from direct supervision evaluation
- Comparative wage differential analysis between positions
- Documentation of primary duty determination rationale

3. Discretion & Independent Judgment Evaluation

- Assessment against standardized regulatory factors for independent judgment
- Analysis of authority to formulate, affect, interpret, or implement policies/practices
- Documentation of decision-making authority and constraints
- Evaluation of consequences of decisions and recommendations
- Comparison against DOL examples and precedents for similar positions as appropriate

4. Exemption-Specific Testing

- Targeted assessment against relevant exemption criteria:
 - Executive exemption: supervision, hiring/firing authority analysis
 - Administrative exemption: administrative vs. production work distinction
 - Professional exemption: specialized education/expertise requirements
 - Computer professional: systems analysis and programming function review
 - Outside sales: customer location and sales activity documentation
- Application of relevant regulatory interpretations and case law precedents

5. Industry-Specific Considerations

- Application of industry-specific exemptions and requirements
- Analysis of specialized rules for educational institutions, government entities, healthcare, etc.
- Review of collective bargaining implications, if applicable
- Assessment of state-specific requirements that exceed federal standards
- Documentation of industry-specific compliance rationale

6. Documentation Alignment

- Job description language assessment for exemption supportability
- Identification of documentation vulnerabilities
- Development of compliant descriptive language
- Creation of audit trail documenting exemption determination process
- Alignment of job documentation with actual duties performed

7. Risk Assessment & Mitigation Planning

- Comprehensive evaluation of misclassification risk by position
- Financial impact analysis of potential misclassification
- Prioritization of positions requiring classification changes
- Development of implementation timeline for required changes
- Creation of monitoring protocols for ongoing compliance

This methodology ensures that all exemption determinations are made systematically, consistently, and in accordance with current regulatory requirements. Our approach has been validated through successful implementation with hundreds of clients and has withstood scrutiny in DOL audits and legal challenges.

Appendix 3: Job Description Review & Analysis Process

Systematic evaluation of job descriptions through our 15-point documentation checklist, assessing critical elements including essential functions, ADA compliance language, FLSA classification support, and competency requirements.

- 1. Strategic Role Alignment**
Validate that the role supports the institution's mission, strategic priorities, and organizational structure.
- 2. Position Title Benchmarking**
Assess title consistency with internal hierarchies and external market comparators.
- 3. Organizational Context**
Clearly define reporting lines, supervisory scope, and cross-functional interfaces.
- 4. Essential Duties and Responsibilities**
Articulate core functions using outcome-based language that reflects operational impact.
- 5. ADA-Compliant Language**
Ensure inclusion of physical and cognitive requirements with appropriate accommodation language.
- 6. FLSA Classification Justification**
Provide documented rationale for exempt/non-exempt status based on duties and salary thresholds.
- 7. Minimum Qualifications**
Specify baseline education, experience, and certifications required for role entry.
- 8. Preferred Qualifications**
Identify additional attributes that enhance performance or succession potential.
- 9. Competency Mapping**
Align behavioral and technical competencies with institutional competency models.
- 10. Work Environment and Conditions**
Describe physical demands, work setting, and any unique environmental factors.
- 11. Work Schedule Expectations**
Clarify standard hours, flexibility, travel, and remote/hybrid eligibility.
- 12. Performance Metrics and KPIs**
Define success measures and how performance will be evaluated.
- 13. Technology and Tools Utilized**
List key systems, platforms, and tools essential to the role.
- 14. Review Cadence and Governance**
Establish a schedule for periodic review and stakeholder accountability.
- 15. Documentation and Version Control**
Maintain audit-ready records with version history and approval tracking.

Appendix 4: Additional Services

We are confident we have provided our most cost-effective and best approach. We have included all products and services which are necessary to provide innovation as well as the functional capabilities proposed in our response. We take pride in our creativity and track record in developing innovative solutions to compensation and benefit issues. We spend considerable time and effort researching and exploring trends and technical issues to develop and test approaches not usually considered by other consulting firms that help inform innovative compensation program solutions.

While we will train the District in its use of the recommended compensation system to ensure the District is able to answer questions and maintain the system long-term. The following services are optional and may be provided in the future:

General Consulting and Strategic Advisory Services

Billed hourly, rate varies based on level of consulting required; dependent on scope of engagement may be billed on a fixed fee basis

Includes the provision of consulting and advisory services focused on areas of human resources, compensation and classification, and related areas. Typically conducted to help develop strategic and operational approaches, support leadership decision making, or to review and/or assess current approaches and processes (e.g., performance assessment, etc.) compensation decisions (e.g. review pay decision – not facilitate a review/study – for HR leader) as a neutral third-party.

Organizational Effectiveness Assessment

Billed on a fixed fee basis based on particulars of the study

Includes a review and in-depth assessment of organizational practices, structures, and operational alignment, often across multiple working units, to determine opportunities for organizational design, operational and strategic priorities, modification of mission/vision and/or how the organization delivers on those items, and to identify opportunities that may increase effectiveness and efficiency. Deliverables include a memorandum summarizing our findings, conclusions, and recommendations.

Span of Control Assessment

Billed on a fixed fee basis based on particulars of the study

Includes a review and in-depth assessment of organizational spans and layers, often across multiple working units, to determine opportunities for organizational redesign, modification of degrees of separation to senior leadership, and to identify opportunities that may increase effectiveness and efficiency. Deliverables include a memorandum summarizing our findings, conclusions, and recommendations.

Reclassification Review

Billed per title

Includes a review of job information through analysis of existing or new job description or Position Description Questionnaire, follow-up with HR, supervisor, or employee as appropriate to ensure understanding, and then development of memo recommendation. Deliverables include a memorandum summarizing our findings, conclusions, and recommendations.

Job Description Development

Billed per title

Leveraging an updated Position Description Questionnaire, Gallagher confirms the need of creation of new classification, and confirmation with client, and writing of new classification.

Market pricing

Billed per title

Client provides job information in current or new job description, Position Description Questionnaire, and Gallagher collects market data from published survey (\$400) and develops market pricing worksheets and memo on the process. If the client needs market data from the local market (like custom survey), Gallagher will research or conduct individual survey, and collect market data from published survey sources to develop the market pricing worksheet and a detailed memo on the process.

Annual Adjustments and Trend Data

Billed per scope of request

Collection of market salary trend data from published survey sources or local market trend data with development of a memo on process and recommendations associated to any structural adjustments.

Executive Compensation Study (Public Sector, Higher Education, Non-Healthcare NPOs)

Billed on a fixed fee basis based on particulars of the study

Comprehensive review of executive compensation and perquisites to facilitate compensation committee decision-making and confirm reasonability of pay packages. This may include but is not limited to research and analysis of market data, industry data (IPEDs, 990, etc.), and others to review or recommend a going-forward approach for affected executives. This type of study is recommended as an annual study.

Pay Equity Study

Billed on a fixed fee basis based on particulars of the study

Comprehensive review, but not limited to actions including, performing a series of statistical tests to determine if there are any pay differences between gender and protected groups that are statistically significant. We will determine whether these differences can be explained by a factor other than gender, race, or age. Statistical analyses will be performed in accordance with standard, professionally accepted methods and those methods that are recognized by the Equal Employment Opportunity Commission (EEOC). Deliverables typically include general pay breakdowns to assess the pay levels and representation for each breakout identified, perform statistical analysis to identify systemic issues, and provide detailed comparisons where necessary. This type of study is recommended as a triennial study.

Performance Management/Assessment Study

Billed on a fixed fee basis based on particulars of the study

Includes the review of existing programs and approaches, stakeholder feedback collection, development of tools and resources and recommendations, and as appropriate custom peer surveying to identify and leverage best practices across region, industry (e.g. higher education), peer cohorts, role type that are supportive of the strategic and operational imperatives of the client to support employee engagement, performance management, and culture. This type of study is recommended as necessary, based on the particulars and needs of the client.

Compensation and Classification Audit

Billed on a fixed fee basis based on particulars of the study

An external review of current market data collection, data sources, job matches, and salary structures. Audit delivery will validate existing processes or result in recommended alternative approaches leveraging the available data. This type of study is recommended as necessary, based on particulars and needs of the client, often coinciding with internal structure changes or revisions.

Change Management

Billed on a fixed fee basis based on particulars of the study

An assessment of current change management practices and communications approaches related to organizational change to identify opportunities for enhancement, additionally as appropriate to the organizational need, training related to managing and facilitating organizational change and the development of communications tools and resources to support change may be developed and delivered to better ensure success and revised internal practices.

Leadership Search Services

Billed on a fixed fee basis based on particulars of the search

Offer both full-cycle and partial-cycle executive search services, as well as recruitment for mid-management and staff-level positions. Our approach emphasizes understanding each client's organizational culture, leadership needs, and community context to deliver high-quality candidate pools. Services include recruitment strategy development, targeted marketing and outreach, candidate sourcing, screening, interview coordination, and support through final selection, negotiation, and onboarding. The firm places a strong focus on diversity, equity, and inclusion, using bias-reducing tools, data-informed sourcing strategies, and partnerships with minority-based professional associations..



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The Gallagher Way. Since 1927.

Gallagher is pleased to submit this proposal to you. While this proposal is not meant to constitute a formal offer, acceptance, or contract, notwithstanding anything to the contrary contained in the proposal, Gallagher is submitting this proposal with the understanding the parties would negotiate and sign a contract containing terms and conditions that are mutually acceptable to both parties.

This material was created to provide accurate and reliable information on the subjects covered by should not be regarded as a complete analysis of these subjects. It is not to provide specific legal, tax or other professional advice. The services of an appropriate professional should be sought regarding your individual situation.

Consulting and insurance brokerage services to be provided by Gallagher Benefit Services, Inc. and/or its affiliate Gallagher Benefit Services (Canada) Group Inc. Gallagher Benefit Services, Inc., a non-investment firm and subsidiary of Arthur J. Gallagher & Co., is a licensed insurance agency that does business in California as "Gallagher Benefit Services of California Insurance Services" and in Massachusetts as "Gallagher Benefit Insurance Services."



Solar Spotlight: Pauma Valley Community Services District

The [Pauma Valley Community Services District \(PVCSD\)](#) in California was created in 1961 to provide for the collection, treatment, and disposal of locally generated wastewater. Later, the agency's mission to protect the public health and environment of its community expanded from providing effective wastewater management to also providing stormwater drainage control, life safety assistance, and security services.

Now, clean solar energy is powering the District's operations. We spoke with Eric Steinlicht, General Manager, to learn more about the organization and their new solar project.

This loan was made possible by the generous participation of the BQuest Foundation.

Photos of the project are courtesy of Sattler Solar.



Please tell us about the programs and services you provide

The District provides wastewater collection through an eight-and-a-half-mile sewer piping system and wastewater treatment; we own and operate a 175,000 gallons/day capacity wastewater treatment plant that receives about 45,000 gallons/day, and we maintain storm drains as well.

We also provide a number of other services, such as easement maintenance along access paths to utility assets. Our security patrol includes multiple officers patrolling the District boundary, in addition to a front-gate dispatch, all 24/7. Those patrol officers also provide emergency advanced first aid until the proper authorities can arrive on the scene; conduct welfare checks; help with parking and events; respond to various issues and situations; and provide niche services such as venomous snake and pest removal.

All ratepayers in the District benefit from our programs and services.



Tell us about your solar project and how it will impact your organization and community

Our 88 kW solar system was primarily designed to offset the significant power demands of our wastewater treatment plant. The plant must aerate the wastewater, which creates a significant power demand for the plant to function properly.

The solar system covers electrical costs to provide an essential service to our ratepayers. Previously, ratepayers shouldered the burden of covering those rising electrical costs for something they need and depend on. With the new system offsetting those costs, our organization is much more resilient. That means rate increases will be much smaller and more stable. Our community will benefit from this rate stabilization, and offsetting electrical costs at the plant will allow us to reinvest in critical infrastructure.

What sparked your organization's interest in solar energy?

Cost savings were a big factor, as our wastewater treatment plant uses a significant amount of energy. In addition, we strive to help protect the environment and advance California's statewide policy goals.

The Advanced Clean Fleets regulation from the California Air Resource Board requires vehicle electrification in order to hit carbon-neutral targets. That makes solar, which can help power EV fleets, more attractive to local agencies like ours. We currently have plans for seven electric vehicle chargers and hope to transition to an all-EV fleet.

Local power generation and storage options also provide us increased resilience and better prepare us for power outages.

Our sustainability initiatives enhance public relations and the public's perception of our agency, and we're showing that we're fulfilling our fiduciary responsibility with taxpayers' funds.

How will you use the savings generated by going solar to further support your mission?

The savings from this project will be reinvested into the wastewater treatment plant as well as other District operations. The savings will also help us build up our reserve funds, allowing the District to establish greater organizational continuity.



What did you learn in the process of going solar that other nonprofits should know?

I learned that it's critical to know about the different financing options, as well as tax incentives and local programs supporting solar. I also learned that a complex project like ours can take some time to complete.

Our project was challenging because it had an unconventional design and was subject to specific codes and regulations. We learned that it's extremely important to follow the requirements of the local utility company, which had not initially been clear to us. That's where CollectiveSun and our installer, Sattler Solar, proved invaluable. Assistance from partners like these is key for agencies like ours who aren't experts in the process of going solar.

Why did you choose to work with CollectiveSun, and how was the experience?

I first heard about CollectiveSun from San Diego Community Power, our local Community Choice Aggregator. San Diego Community Power purchases energy, and our local utility, San Diego Gas & Electric (SDG&E), then delivers that energy to us over their poles and wires. I contacted Community Power to see if they offered any programs to help complete our solar project when we ran into a snag: we discovered that we would be incurring an unexpected charge from SDG&E for upgrades needed where our solar project would connect to the grid.

At that point, the District was running out of options, and I was seriously considering recommending to our board that we scrap the project. However, CollectiveSun got us back on track with a [Solar Loan](#), and our experience working with them has been superb.

When our project encountered issues, CollectiveSun went out of their way to work through those issues every step of the way. This far exceeded my expectations; I did not expect a lender offering a competitive loan to be so helpful and engaged to see the project through! CollectiveSun's positive attitude and willingness to help, in partnership with our incredible installer, Sattler Solar, helped us complete the project successfully.

How would someone get in touch with your organization to learn more about your services?

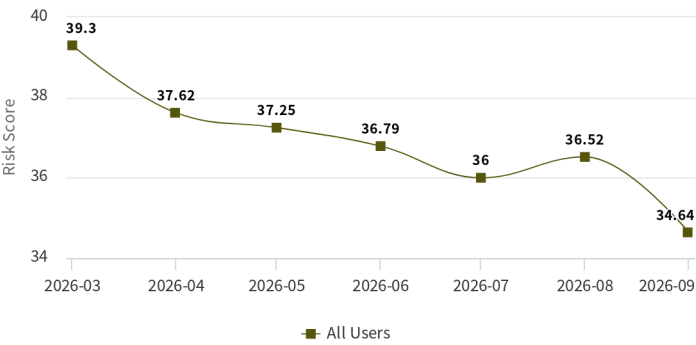
The best place to start is our website, <https://paumavalleycsd.ca.gov>. There, you can learn more about the Pauma Valley Community Services District.

Pauma Valley Community Services District

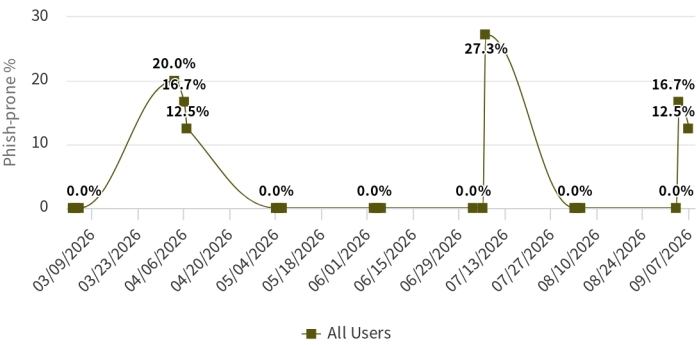
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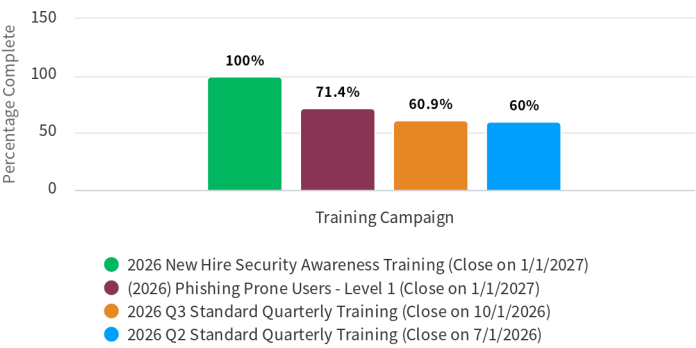
Risk Score Trend (Company average over the last 6 months)



Phish-prone % (Company percent from last 6 months)



Training Completion (Company percentages from last month)



Phishing Test Results (Company totals from last month)

