I hereby certify that the following agenda was posted at least 72 hours prior to the time of the meeting so noticed below at 24251 Los Alisos Boulevard, Lake Forest, California.

DENNIS P. CAFFERTY, Secretary
of the El Toro Water District and
the Board of Directors thereof

AGENDA

EL TORO WATER DISTRICT
REGULAR MEETING OF THE BOARD OF DIRECTORS

October 22, 2026
7:30 a.m.

BOARDROOM, DISTRICT OFFICE
24251 LOS ALISOS BLVD., LAKE FOREST, CA 92630

Director Mark Monin will be attending remotely from:
13200 Main Street, Trona CA 93562

This meeting will be held in person. As a convenience for the public, the meeting may also be accessed by Zoom and will be available by either computer or telephone audio as indicated below. Because this is an in-person meeting and the virtual component is not required, but rather is being offered as a convenience, if there are any technical issues during the meeting, this meeting will continue and will not be suspended.

Members of the public who wish to comment on any item within the jurisdiction of the District or on any item on the agenda, may attend the meeting in person at the District's office or may observe and address the Meeting by joining at this link: https://us02web.zoom.us/j/84750318469 (Meeting ID: 847 5031 8469).

Members of the public who wish only to listen to the telephonic meeting may dial in at the following numbers (669) 900-6833 or (346) 248-7799 with the same Meeting ID noted above. Please be advised the Meeting is being recorded.

CALL MEETING TO ORDER – President Freshley

PLEDGE OF ALLEGIANCE – Director McClean

ROLL CALL (Determination of a Quorum)

ORAL COMMUNICATIONS/PUBLIC COMMENTS

Members of the public may address the Board at this time or they may reserve this opportunity with regard to an item on the agenda, until said item is discussed by the Board. Comments on other items will be heard at the time set aside for "COMMENTS REGARDING NON-AGENDA ITEMS." The public may identify themselves when called on and limit their comments to three minutes.

ITEMS RECEIVED TOO LATE TO BE AGENDIZED

Determine need and take action to agendize items which arose subsequent to the posting of the Agenda. (ROLL CALL VOTE: Adoption of this recommendation requires a two-thirds vote of the Board members present, or, if less than two-thirds of the Board members are present, a unanimous vote of those members present.)

1. Consider Board Member's Request for Remote Participation (AB 2449)

2. Presentation of Awards, Recognition, Certifications and Introductions

Service Awards

Mr. Cafferty will recognize and congratulate Daniel Orozco, Collection Maintenance Worker III, for 10 Years of Service

3. Consent Calendar

(All matters under the Consent Calendar will be approved by one motion unless a Board member or a member of the public requests separate action or discussion on a specific item)

a. Consider approving the minutes of the September 24, 2026 Board meeting

b. Consider approving Director Freshley, Director Monin, Director Gaskins and Director McClean to attend the Urban Water Institute Spring Conference.

Recommended Action: The Board will consider approving the above Consent Calendar.

4. Director Reports for Meetings Attended (Oral Report)

GENERAL MANAGER ACTION ITEMS

5. **Resolution 26-10-1 - Administrative Code Amendment – Records Storage and Retention Policy** (Reference Material Included)

Staff will review and comment on Resolution 26-10-1 adopting and adding the "Records Storage and Retention Policy" to the District Administrative Code as Section 9070.

Recommended Action: Staff recommend that the Board of Directors consider adopting Resolution No. 2026-10-1 adopting and adding Section 9070 – Records Storage and Retention Policy to the District Administrative Code.

RESOLUTION NO. 26-10-1

RESOLUTION OF THE BOARD OF DIRECTORS
OF THE EL TORO WATER DISTRICT
ADOPTING AND ADDING SECTION 9070 - RECORDS STORAGE AND RETENTION POLICY TO THE DISTRICT'S ADMINISTRATIVE CODE
AUTHORIZING DESTRUCTION OF CERTAIN AGENCY RECORDS

6. **Designation of Voting Representative for ACWA Amended and Restated Bylaws** (Reference Material Included)

The Board will consider designating a Voting Representative for the purpose of casting a vote regarding the Amended and Restated Bylaws of the Association of California Water Agencies.

Recommended Action: Staff recommend that the Board of Directors designate General Manager Dennis Cafferty for the purpose of casting a vote regarding the Amended and Restated Bylaws of the Association of California Water Agencies. Staff further recommend the Board direct the General Manager to complete and submit the ACWA Authorized Voting Representative Form identifying the Board approved Voting Representative.

GENERAL MANAGER INFORMATION ITEMS

7. **Recycled Water Project Opportunities** (Reference Material Included)

Staff will provide an update on potential recycled water expansion project opportunities.

8. **General Manager's Monthly Report** (Reference Material Included)

Staff will review and comment on the General Manager's Monthly Report.

9. **Legislative Reports** (Reference Material Included)

Staff and General Counsel will review and comment on the Legislative reports.

10. **Public Education and Outreach Report** (Reference Material Included)

Staff will review and comment on the Public Education and Outreach report.

11. **Water Use Efficiency Report** (Reference Material Included)

Staff will review and comment on the Water Use Efficiency Report.

12. **South Orange County Wastewater Authority (SOCWA) Report**
(Reference Material Included)

a. SOCWA Board Meeting – October 1, 2026

b. SOCWA Executive Committee Meeting – October 13, 2026

c. SOCWA Engineering Committee Meeting – October 15, 2026

d. SOCWA Finance Committee Meeting – October 20, 2026

13. **Municipal Water District of Orange County (MWDOC) Report**
(Reference Material Included)

a. MWDOC Planning/Operations Meeting – October 5, 2026

b. MWDOC Met Directors Workshop – October 7, 2026

c. MWDOC Admin/Finance Meeting – October 14, 2026

d. MWDOC Board Meeting – October 21, 2026

14. **South Orange County Agencies Group Meeting** (Reference Material Included)

Report on the September 24, 2026 SOCAG meeting

15. **Local Agency Formation Commission Report** (Reference Material Included)

Report on the October 14, 2026 LAFCO meeting

16. **ISDOC Meetings Report** (Reference Material Included)

Report on the October 16, 2026 ISDOC Executive Committee meeting

17. **WACO Meeting Report** (Reference Material Included)

Report on the October 2, 2026 WACO Meeting

COMMITTEE AND GENERAL INFORMATION

18. <u>Dates to Remember for October/November</u> (Reference Material Included)

COMMENTS REGARDING NON-AGENDA ITEMS

ATTORNEY REPORT

CLOSED SESSION

At this time the Board will go into Closed Session as follows:

1. Pursuant to Government Code Section 54956.9 (d) (4) to consult with legal counsel and staff- Potential Initiation of Litigation. (one matter)

2. Pursuant to Government Code Section 54956.8 to consult with the District's Designated Negotiator (Dennis P. Cafferty), regarding the price, terms & conditions pertaining to the District's proposed purchase of an easement from the Golden Rain Foundation of Laguna Woods. Said easement would be located on the Laguna Woods Golf Course and is in conjunction with the District's Project of relocating and repairing existing public service facilities (Effluent Transmission Main) therein.

3. Pursuant to Government Code Section 54957 (b)(1) to conduct the General Manager's annual performance evaluation.

REGULAR SESSION

REPORT ON CLOSED SESSION (Legal Counsel)

Mr. Granito will provide an oral report on the Closed Session.

ADJOURNMENT

The agenda material for this meeting is available to the public at the District's Administrative Office, which is located at 24251 Los Alisos Blvd., Lake Forest, CA. 92630. If any additional material related to an open session agenda item is distributed to all or a majority of the board of directors after this agenda is posted, such material will be made available for immediate public inspection at the same location.

<u>Request for Disability-Related Modifications or Accommodations</u>

If you require any disability-related accommodation, including auxiliary aids or services, in order to participate in this public meeting, please telephone the District's Recording Secretary, Marisol Melendez at (949) 837-7050, extension 225 at least forty-eight (48) hours prior to said meeting. If you prefer, your request may be submitted in writing to El Toro Water District, P.O. Box 4000, Laguna Hills, California 92654, Attention: Marisol Melendez.

MINUTES OF THE REGULAR MEETING OF THE
BOARD OF DIRECTORS OF THE
EL TORO WATER DISTRICT
September 24, 2026

President Freshley called the meeting of the Board of Directors of the EL TORO WATER DISTRICT to order at 7:30 a.m.

Director Gaskins led the Pledge of Allegiance to the flag.

Directors MARK MONIN, MIKE GASKINS, KAY HAVENS, KATHRYN FRESHLEY, and WYATT McCLEAN participated.

Also participating were DENNIS P. CAFFERTY, General Manager, GILBERT J. GRANITO, General Counsel, JUDY CIMORELL, Director of Human Resources, HANNAH FORD, Director of Engineering, MIKE MIAZGA, Information Technology Manager (Zoom), SHERRI SEITZ, Public Affairs Manager, VU CHU, Water Resources Supervisor, MATT VERA, Senior Engineer (Zoom), JANET FORDUNSKI, Member of the Public (Zoom), MICHAEL MILLER, Member of the Public (Zoom), and MARISOL MELENDEZ, Recording Secretary.

Determination of a Quorum

Roll Call:

Director McClean	Present
Director Monin	Present
Director Gaskins	Present
Vice President Havens	Present
President Freshley	Present

Five Board members were present for the meeting. Therefore, a Quorum was determined.

Oral Communications/Public Comments

There were no comments.

Items Received Too Late to be Agendized

President Freshley asked if there were any items received too late to be agendized. Mr. Cafferty replied no.

Consent Calendar

President Freshley asked for a Motion.

Motion: Director Monin made a Motion, seconded by Director Gaskins to approve the Consent Calendar.

Roll Call Vote:

Director McClean	aye
Director Monin	aye
Director Gaskins	aye
Vice President Havens	aye
President Freshley	aye

Directors Reports for Meetings Attended

Director Gaskins stated that he attended the MWDOC/MET Directors Workshop, the SOCWA Planning Committee meeting, the MWDOC P&O meeting, the SOCWA Board meeting, the WACO meeting, the MWDOC Board meeting, the Laguna Hills Chamber of Commerce Luncheon, the Engineering and Finance committee meeting, the District's regular Board meeting, the SOCAG meeting, the OC Water Summit, and will attend another SOCWA Planning Committee meeting next week.

Director Monin stated that he attended the ISDOC Executive meeting, the MWDOC/Met Directors Workshop, the WACO meeting, the WACO Planning meeting, the MWDOC P&O meeting, the MWDOC A&F meeting, the MWDOC Board meeting, both the District's Board meetings, a MET Inspection trip and the OC Water Summit.

Director McClean stated that he attended the ISDOC Executive Committee meeting, the OC Water Summit, the District's regular Board meeting, the District's Engineering and Finance meeting, the MWDOC Board meeting, the Laguna Hills Chamber of Commerce Luncheon, the WACO meeting, and the MWDOC/MET Directors Workshop.

Vice President Havens stated that she attended the MWDOC/Met Directors Workshop, the MWDOC P&O meeting, the MWDOC Admin/Finance meeting, the MWDOC Board meeting, the WACO meeting, the President/Vice President/General Manager meeting, the Agenda Review meeting, the Laguna Hills Chamber of Commerce Luncheon, the District's Engineering and Finance meeting, the District's regular Board meeting and the OC Water Summit.

President Freshley stated that she attended both ETWD's regular Board meetings, the Agenda Review meeting, the Laguna Woods City Council meeting, the WACO meeting, the MWDOC/Met Directors Workshop, the MWDOC P&O meeting, the LAFCO meeting, the SOCWA Board meeting, the SOCWA Finance Committee meeting, the President/Vice President/General Manager meeting, the Laguna Hills Chamber Luncheon, the SOCAG meeting, the OC Water Summit, and will attend the SOCWA Planning Committee meeting.

General Manager Action Items

Agreement for Systemwide Facilities for the Joint Regional Water Supply System

Mr. Cafferty reported that South Coast Water District (SCWD), who is the operator of the Joint Regional Water Supply System (JRWSS) has been in the process of developing an Agreement for Systemwide Facilities for the Joint Regional Water Supply System. The District's capacity which includes the Joint Transmission Main

(JTM), conveys imported water to the JTM Pump Station at the R-1/R-2 Reservoir site and is then pumped into the District's water distribution system. The JRWSS Committee identified systemwide costs and the District's capacity ownership is 0.23 percent. The only impact to the District is the new Systemwide Facilities Agreement which encompasses the systemwide facilities and systemwide costs.

President Freshley asked for a Motion.

Motion: Director Gaskins made a Motion, seconded by Director Monin to approve the Agreement for Systemwide Facilities for the Joint Regional Water Supply System and provide notice to South Coast Water District as the Designated Operator so the JRWSS Member Agencies can execute the Agreement via DocuSign.

Roll Call Vote:

Director McClean	aye
Director Monin	aye
Director Gaskins	aye
Vice President Havens	aye
President Freshley	aye

General Manager Information Items

General Manager's Monthly Report

Mr. Cafferty reported that the Customer Service Activity Report was revised to separate the office and field data, providing a more useful and logical format. Staff also added a section to the report displaying service disconnections and billing delinquencies, including the number of accounts with outstanding balances.

Legislative Reports

Mr. Cafferty noted that SB 1125, relating to the Low-Income Rate Assistance Program, was advanced and is waiting for the Governor's approval. He added that as staff proceeds with the delinquent account process, the program will become more

relevant, although implementation may take some time.

Public Education and Outreach Report

Ms. Seitz requested feedback from the Board on the Laguna Woods Television schedule and potentially returning to a standing interview date each month. The Board decided that each individual Board member will have the option to have a slide presentation. The Board also agreed to schedule the interview on the first Tuesday of each month.

Ms. Seitz reviewed recent and upcoming community engagement events. She also demonstrated the new District website highlighting the updated design.

Water Use Efficiency Report

Mr. Chu reported that potable water consumption increased about 3.9% in August compared to the prior year. Recycled water demand is also tracking above last year. On a year-to-date basis, recycled water is approximately 2.8% higher than last year. Overall, demand continues to track higher across all major classes.

SOCWA Reports

President Freshley reported that the Board discussed the installation of a generator at JBL Plant One. She also reported that the Board approved the hiring of a firm to monitor water quality reports for the two outfalls. Additionally, President Freshley noted that the cost allocation policy was discussed at the Finance Committee meeting. Ms. Ford reported that staff remains focused on the Techite replacement project.

MWDOC

Vice President Havens noted the significance of the Merrimac Petroleum contract.

LAFCO

President Freshley reported that the Santa Margarita Water District's General Manager presented on the annexation of San Juan Capistrano's Water and Wastewater Utilities.

ISDOC

Director Monin reported that the Secretary position remains vacant.

WACO

Director Monin reported that Bill Hasencamp was the program speaker and he presented on the Colorado River.

COMMITTEE AND GENERAL INFORMATION

Dates to Remember for September/October 2026

There were no comments.

Attorney Report

Mr. Granito reported that there is a need for a Closed Session today in regards to both items on today's Closed Session Agenda.

Closed Session

At approximately 9:11 a.m., everyone left the open session except the Board, General Counsel, Mr. Cafferty, and Ms. Ford. Also, at this time the Board took a short recess prior to going into closed session.

Regular Session

At approximately 9:38 a.m., the meeting returned to Regular Session. Also, at this time, Ms. Melendez returned to the meeting.

Open Session Report

Mr. Granito reported that the Board went into Closed Session to discuss both items on today's Closed Session Agenda. No reportable action was taken.

Comments Regarding Non-Agenda Items

Mr. Cafferty noted that a college student would possibly join the District's sponsored table at the OC Water Summit. He also provided an update on the attendees participating in the Lake Forest Chamber of Commerce Legislative Luncheon.

Adjournment

There being no further business to come before the Board, the meeting was adjourned at approximately 9:45 a.m.

Respectfully submitted,

MARISOL MELENDEZ
Recording Secretary

APPROVED:

KATHRYN FRESHLEY, President of
the El Toro Water District and the
Board of Directors thereof

DENNIS P. CAFFERTY, Secretary
of the El Toro Water District and
the Board of Directors thereof

2027 Spring Conference

***Please note the Early Bird Rate ends 11/6/26!**

Wednesday, February 24, 2027 at 1:00 PM (PST) to Friday, February 26, 2027 at 11:00 AM (PST)
Renaissance Esmeralda Resort & Spa
44400 Indian Wells Lane Indian Wells, CA 92210-8708 United States

Register Now
Unlock Member Pricing
Conference Sponsorships
Add to Calendar

URBAN WATER INSTITUTE
A FORUM FOR WESTERN WATER ISSUES

IMPORTANT:

Each conference attendee must have a user profile (with unique email address).

The registration limit for this event is 300 attendees.

Overview | Pricing | Attendees | Hotel

UWI 2027 Spring Conference

Join us February 24-26, 2027 at the Urban Water Institute's 2027 Spring Conference in Indian Wells, California. Our Spring Conference Agenda will deliver timely topics and dynamic sessions you won't want to miss!

Leading experts will deliver presentations on today's most pressing water management issues, representing a broad range of expertise and non-partisan perspectives. Conference highlights include enhanced networking opportunities, access to keynote speakers, meals and happy hours included with your Conference registration.

UWI Conferences bring together elite water leaders from throughout California representing public, private, nonprofit and academic organizations. This conference is sure to be one of the best water conferences of the year!

Spring Conference Registration

Online registration is now open for UWI's 2027 Spring Conference.

Register Now

Please note: *You will need a user account to begin the registration process. If you are registering multiple attendees, each attendee will need a profile with a unique email address. You can create additional user profiles in your Member Compass under the People tab. Please contact us if you do not see this tab so that we can give you management access on your account.*

A printed registration form is also available (upon request) if you are unable to register online.

Cancellation Policy: Event registration cancellations will be accepted until 2/12/27 and will be subject to a $50 processing fee. Cancellations received after 2/12/27 are not eligible for refund.

Spring Conference Agenda

Stay tuned for the full 2027 Spring Conference Agenda.

If you have suggestions for future conference speakers or topics, please use the Speaker & Topic Suggestion Form form to submit your ideas.

Spring Conference Date & Time

The UWI 2027 Spring Conference dates and times are as follows:

- Conference begins: Wednesday, February 24, 2027 at 1:00 PM
- Conference ends: Friday, February 26, 2027 at 11:00 AM

Spring Conference Location

Renaissance Esmeralda Resort & Spa
44400 Indian Wells Ln
Indian Wells, CA 92210
(760) 773-4444

Please visit the Hotel tab above for additional information on booking your room.

Agenda Item No. 5

STAFF REPORT

To: Board of Directors **Meeting Date: October 22, 2026**

From: Dennis Cafferty, General Manager

Subject: Resolution 26-10-1 - Administrative Code Amendment
Records Storage and Retention Policy (§9070)

Background

The District's Policy Statement Manual included a Records Storage and Retention Policy. The Records Storage and Retention Policy (Policy) relies on a variety of state and federal statutes regarding the storage and destruction of District records. The effort to update the detailed records retention schedules in compliance with current law was a complicated and time consuming process.

Staff retained Gladwell Governmental Services, Inc., (GGS), an expert in special district records, to perform a detailed evaluation and comprehensive update of the records retention schedules for the District. This program was necessary to ensure retention periods reflected changes in law, to reduce current and future records storage costs, eliminate duplication of effort, increase efficiency and take advantage of current technology.

Gladwell Governmental Services, Inc. has assisted over 250 California municipal governments with their records management, records retention and/or document imaging programs, including many special districts.

The retention schedules for ETWD were written interactively with all departments participating. They provide clear, specific records descriptions and retention periods, and apply current law and technology to the management of ETWD's records.

The appropriate Division or Department Head and General Counsel have reviewed and approved all Retention Schedules.

It is standard business practice for California local governments to authorize the routine destruction of records that have exceeded their adopted retention period, upon the request of the Department Head and with the consent of the Department Head and General Manager, which is provided in Section 3 of the resolution.

It is also standard business practice for California local governments to authorize updates to the retention schedules without further action of the Board of Directors with the approval of the General Manager as noted in Section 5 of the resolution.

In addition to updating the detailed Records Retention Schedules, staff, in conjunction with Gladwell Governmental Services have identified proposed updates to the Records Storage and Retention Policy. The updated Policy is proposed to be incorporated as Section 9070 of the Administrative Code.

The redline version of the updated Policy immediately follows this staff paper. The clean version of the Policy is included as an attachment to Resolution 2026-10-1.

Recommended Action:

Staff recommend that the Board of Directors consider adopting Resolution No. 2026-10-1 adopting and adding Section 9070 – Records Storage and Retention Policy to the District Administrative Code.

RESOLUTION NO. 26-10-1

RESOLUTION OF THE BOARD OF DIRECTORS
OF THE EL TORO WATER DISTRICT
ADOPTING AND ADDING SECTION 9070 - RECORDS STORAGE AND
RETENTION POLICY TO THE DISTRICT'S ADMINISTRATIVE CODE
AUTHORIZING DESTRUCTION OF CERTAIN AGENCY RECORDS

§9070 RECORDS STORAGE AND RETENTION POLICY

1. PURPOSE OF POLICY

The purpose of this policy ("Policy") is to control the orderly retention, preservation and disposition of the El Toro Water District's ("District") records based on state and federal statutes governing public records. The Policy establishes how the District assigns responsibility and creates the administrative framework through which the purposes of the Policy are to be achieved. This Policy is developed and administered by the District's executive management staff and is subject to periodic revisions by the Board of Directors of the District.

2. GENERAL POLICY

This Policy is hereby established for the orderly maintenance and storage of District records which are retained for administrative, operational, legal, fiscal, historical, or research purposes. The objectives of the Policy are:

A. To establish the authority and assign the responsibility for carrying out the document management program required by state law and to create the administrative framework through which the purposes of the program are to be achieved.

B. To create efficient information retrieval through a uniform classification and computerized filing system.

C. To explain the process for transferring inactive records from high-cost office space to an information technology system (electronic records) thereby reducing filing equipment and space.

D. To establish the process and procedures for preserving and protecting records in all formats, including electronic records ~~(emails, software generated documents, etc.)~~.

E. To develop the necessary procedures for the orderly destruction of records and working papers no longer required by statute to be retained, and which are no longer needed for administrative, operational, legal, fiscal, historical, or research purposes and the preservation of records with long-term or permanent value.

F. The protection of records vital to the District in the event of a disaster.

G. The elimination of duplicate records.

3. DOCUMENT MANAGEMENT ADMINISTRATOR

The General Manager will designate the Document Management Administrator. As such, the duties of the Document Management Administrator shall be:

A. Administer the document management program and provide assistance to department heads in its implementation and maintenance and training of employees.

B. Plan, formulate and prescribe and implement document disposition systems, standards and procedures consistent with this Policy, including the Records Retention Schedule, as amended ~~by the Board~~ from time-to-time.

~~B.~~C. Provide procedures, forms, and employee training to facilitate the authorized destruction or deletion of official records that have exceeded their retention period and are no longer required to conduct District business in compliance with all policies, including Legal Holds.

~~C.~~D. In cooperation with department heads, identify essential records and establish a disaster plan for each department to ensure maximum availability of the records/documents in order to re-establish operations quickly and with minimum disruption and expense.

~~D.~~E. Monitor records and the Records Retention Schedule and administrative rules and laws~~, including the State Guidelines~~ to determine if the ~~Authority's~~ District's document management program and retention schedules are in compliance with state regulations. Department heads are to be issued information concerning changes to state regulations and laws.

~~E.~~F. Bring to the attention of the General Manager any document management program non-compliance by department heads or other ~~Authority~~ District personnel.

4. DUTIES AND RESPONSIBILITIES OF DEPARTMENT HEADS

Each District department head shall be responsible for managing the procedures established under the Policy. This includes, but is not limited to the following:

A. Cooperate with the Document Management Administrator in carrying out the procedures established by the Policy for the efficient and economical management of records.

B. Adequately document the transactions and activities, services, programs and duties for which the department head is responsible.

C. Maintain the records in his/her care and carry out their preservation, destruction or other disposition only in accordance

with the policies and procedures of the document management program.

5. DOCUMENT CONTROL PROCEDURES

~~Control Schedules~~

A. RECORDS RETENTION SCHEDULES

The Document Management Administrator, in cooperation with department heads, shall ~~prepare document control~~ update the records retention schedules on a department by department basis listing all records series created or received by the department and the retention period for each series consistent with this Policy. Updates to the records retention schedule shall be approved by the General Manager. ~~Document control~~Records retention schedules shall also include such other information regarding the disposition of records/documents as may be needed to provide clarification or other information.

The District's Records Retention Schedules, included with this Policy as Exhibit A, are guided by state and federal laws.

B. GOVERNMENT CODE AND OTHER LAWS

The ~~following~~ current sections of Government Code (Chapter 7) provide for the retention and ~~D~~destruction of ~~R~~records of Special Districts:

60200, 60201, 60202, 60203 and 60204

In addition, other State and Federal laws apply to certain records retained by the District, as listed in the Records Retention Schedules.

~~60200. Duplicate records, papers, or documents. The legislative body of any special district may authorize at any time the destruction or disposition of any duplicate record, paper, or document, the original or a permanent photographic record of which is in the file of any officer of department of the District.~~

60201. Records, papers or documents more than two years old and prepared or received other than pursuant to statute. The legislative body of a district may authorize the destruction or disposition of any record, paper, or document which is more than two years old and which was received in any manner other than pursuant to state statute. Such records, papers, or documents need not be photographed, reproduced, or microfilmed prior to destruction and no copy thereof need be retained.

60202. Unaccepted bids for construction of public works more than two years old. The legislative body of a district may authorize the destruction of any unaccepted bid or proposal for the construction or installation of any building, structure or other public work, which is more than two years old.

60203. Records, papers, or documents not required to be filed: Conditions. The legislative body of a district may authorize the destruction of any record, paper, or document that is not expressly required by law to be filed and preserved if all of the following conditions are complied with:

The record, paper, or document is photographed, micro photographed, or reproduced by electronically recorded video images on magnetic surfaces, recorded in the electronic data processing system, recorded on optical disk, or any other medium which does not permit additions, deletions, or changes to the original document in compliance with the minimum standards or guidelines, or both, as recommended by the American National Standards Institute or the Association for Information and Image Management for recording of permanent records or non-permanent records, whichever applies.

The device used to reproduce the record, paper, or document on film optical disk or any other medium is one which accurately reproduces the original thereof in all details, and which does not permit additions, deletions, or changes to the original document images;

The photographs, microphotographs, or other reproductions on film or any other medium are placed in conveniently accessible files and provision is made for preserving, examining, and using the files.

For the purposes of this section, every reproduction shall be deemed to be an original record and a transcript, exemplification, or certified copy, as the case may be, of the original.

The District's Records Retention Schedule, included with this Policy as Exhibit A, is guided by the State Guidelines, and other state and federal laws.

6. POLICY REVISIONS

~~Revisions~~

This document may be revised upon approval by the Board. Revisions will be recommended whenever applicable federal, state or local regulations change or otherwise as the need arises. The General Manager is authorized to implement any procedure under this Policy so as to comply with law and the State Guidelines, with any change to this Policy necessitated thereby to be ratified by the Board on a timely basis.

R 00-7-1 07/20/00; R 06-9-1 09/28/06; 10/22/26

RESOLUTION NO. 26-10-1

RESOLUTION OF THE BOARD OF DIRECTORS OF THE EL TORO WATER DISTRICT ADOPTING AND ADDING SECTION 9070 RECORDS STORAGE AND RETENTION POLICY TO THE DISTRICT'S ADMINISTRATIVE CODCE AUTHORIZING DESTRUCTION OF CERTAIN AGENCY RECORDS

WHEREAS, the maintenance of numerous records is expensive, slows document retrieval, and is not necessary after a certain period of time for the effective and efficient operation of the government of the El Toro Water District; and

WHEREAS, Section 60200 of the Government Code of the State of California provides that the legislative body of a Special District may authorize at any time the destruction or disposition of any duplicate record, paper, or document, the original or a permanent photographic record of which is in the files of any officer or department of the Agency; and

WHEREAS, Section 60201 of the Government Code of the State of California provides that Agency records which have served their purpose, which are not expressly required by law to be filed and persevered, and which will not adversely affect any interest of the Agency or public may be destroyed; and

WHEREAS, the District has a procedure to maintain a list of the types of records destroyed or disposed of that reasonably identifies the information contained in the records in each category.

NOW, THEREFORE, BE IT RESOLVED AS FOLLOWS:

Section 1. The Board of Directors finds that the destruction or disposition of the records series that have exceeded the retention periods as set forth in the Records Retention Schedules included as Exhibit A to the Records Storage and Retention Policy (Section 9070 of the District Administrative Code) will not adversely affect any interest of the Agency or the public.

Section 2. The Board of Directors acknowledges that there may be records that are on a destruction hold from time to time. The attached Records Storage and Retention Policy provides that these records are preserved in the "How to Use Records Retention Schedules" and at the top of each page of the Records Retention Schedules ("HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion)."

Section 3. The records of the El Toro Water District, as set forth in the Records Retention Schedules (Exhibit A of the Policy), attached hereto and incorporated herein by this reference, are hereby authorized to be destroyed as provided by Section 60201 et seq. of the Government Code of the State of California and in accordance with the provision of said schedule in accordance with District policies and procedures, and with the approval of the Department Head and General Manager, provided there is no type of Hold on destruction;

Section 4. With the consent of the Department Head, General Manager and General Legal Counsel, updates are hereby authorized to be made to the Records Retention Schedules without further action of the Board of Directors.

Section 5. The term "records" as used herein shall include documents, instructions, books, microforms, electronic files, magnetic tape, optical media, or papers; as defined by the California Public Records Act.

Section 6. This resolution shall become effective immediately upon its passage and adoption.

ADOPTED, SIGNED AND APPROVED this 22nd day of October 2026, by the following vote:

AYES:
NOES:
ABSENT:
ABSTAIN:

_____

KATHRYN FRESHLEY, President
El Toro Water District
and of the Board of
Directors thereof

ATTEST:

_____

DENNIS P. CAFFERTY, Secretary
El Toro Water District and of
the Board of Directors thereof

EXHIBIT "A"

EL TORO WATER DISTRICT
SECTION 9070 OF THE ADMINISTRATIVE CODE
RECORDS STORAGE AND RETENTION POLICY

§9070 RECORDS STORAGE AND RETENTION POLICY

1. PURPOSE OF POLICY

The purpose of this policy ("Policy") is to control the orderly retention, preservation and disposition of the El Toro Water District's ("District") records based on state and federal statutes governing public records. The Policy establishes how the District assigns responsibility and creates the administrative framework through which the purposes of the Policy are to be achieved. This Policy is developed and administered by the District's executive management staff and is subject to periodic revisions by the Board of Directors of the District.

2. GENERAL POLICY

This Policy is hereby established for the orderly maintenance and storage of District records which are retained for administrative, operational, legal, fiscal, historical, or research purposes. The objectives of the Policy are:

A. To establish the authority and assign the responsibility for carrying out the document management program required by state law and to create the administrative framework through which the purposes of the program are to be achieved.

B. To create efficient information retrieval through a uniform classification and computerized filing system.

C. To explain the process for transferring inactive records from high-cost office space to an information technology system (electronic records) thereby reducing filing equipment and space.

D. To establish the process and procedures for preserving and protecting records in all formats, including electronic records.

E. To develop the necessary procedures for the orderly destruction of records and working papers no longer required by statute to be retained, and which are no longer needed for administrative, operational, legal, fiscal, historical, or research purposes and the preservation of records with long-term or permanent value.

F. The protection of records vital to the District in the event of a disaster.

G. The elimination of duplicate records.

3. DOCUMENT MANAGEMENT ADMINISTRATOR

The General Manager will designate the Document Management Administrator. As such, the duties of the Document Management Administrator shall be:

A. Administer the document management program and provide assistance to department heads in its implementation and maintenance and training of employees.

B. Plan, formulate and prescribe and implement document disposition systems, standards and procedures consistent with this Policy, including the Records Retention Schedule, as amended from time-to-time.

C. Provide procedures, forms, and employee training to facilitate the authorized destruction or deletion of official records that have exceeded their retention period and are no longer required to conduct District business in compliance with all policies, including Legal Holds.

D. In cooperation with department heads, identify essential records and establish a disaster plan for each department to ensure maximum availability of the records/documents in order to re-establish operations quickly and with minimum disruption and expense.

E. Monitor records and the Records Retention Schedule and administrative rules and laws to determine if the District's document management program and retention schedules are in compliance with state regulations. Department heads are to be issued information concerning changes to state regulations and laws.

F. Bring to the attention of the General Manager any document management program non-compliance by department heads or other District personnel.

4. DUTIES AND RESPONSIBILITIES OF DEPARTMENT HEADS

Each District department head shall be responsible for managing the procedures established under the Policy. This includes, but is not limited to the following:

A. Cooperate with the Document Management Administrator in carrying out the procedures established by the Policy for the efficient and economical management of records.

B. Adequately document the transactions and activities, services, programs and duties for which the department head is responsible.

C. Maintain the records in his/her care and carry out their preservation, destruction or other disposition only in accordance with the policies and procedures of the document management program.

5. DOCUMENT CONTROL PROCEDURES

A. RECORDS RETENTION SCHEDULES

The Document Management Administrator, in cooperation with department heads, shall update the records retention schedules on a department by department basis listing all records series created or received by the department and the retention period for each series consistent with this Policy. Updates to the records retention schedule shall be approved by the General Manager. Records retention schedules shall also include such other information regarding the disposition of records/documents as may be needed to provide clarification or other information.

The District's Records Retention Schedules, included with this Policy as Exhibit A, are guided by state and federal laws.

B. GOVERNMENT CODE AND OTHER LAWS

The current sections of Government Code (Chapter 7) provide for the retention and destruction of records of Special Districts:

60200, 60201, 60202, 60203 and 60204

In addition, other State and Federal laws apply to certain records retained by the District, as listed in the Records Retention Schedules.

6. POLICY REVISIONS

This document may be revised upon approval by the Board. Revisions will be recommended whenever applicable federal, state or local regulations change or otherwise as the need arises. The General Manager is authorized to implement any procedure under this Policy so as to comply with law and the State Guidelines, with any change to this Policy necessitated thereby to be ratified by the Board on a timely basis.

Exhibit A

Records Retention Schedules

Records Retention Schedule Index

Records Retention Schedule Index

Retention Schedule User Information

- How to Use Retention Schedules
- Records Retention Schedule Legend

District Wide

Administration – General Manager

Administration – Board Secretary

Administration – Emergency Management

Administration – Public Affairs / Community Relations / Governmental Affairs

Administration – Water Use Efficiency

Engineering

Human Resources

Finance / Payroll / Risk Management

Customer Service

Operations

Information Technology

Records Retention Schedule
User Information

HOW TO USE RETENTION SCHEDULES

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A **legend** explaining the information presented in the retention schedule; please read this for an explanation of every column.

The specified retention period applies regardless of the media of the record: If a record is stored on paper and electronic format (a computer file on a hard drive), **all electronic and paper records should be destroyed (or deleted / erased) after the specified period of time has elapsed** and authorization to destroy has been obtained.

Copies or duplicates of records should never be retained longer than the prescribed period for the official (original) record, and drafts and copies should be destroyed as soon as they are no longer required.

The term "records" shall include all records as defined by the California Public Records Act.

STRUCTURE: DISTRICT-WIDE, DEPARTMENTS & DIVISIONS

The District-wide retention schedule includes those records all departments have in common (e-mails, letters, memorandums, purchase orders, etc.). These records are NOT repeated in the Department retention schedule, unless that department is the Office of Record.

Each department has a separate retention schedule that describes the records that are unique to their department, or for which they are the Office of Record. The department retention schedules may be organized by Division within that Department. If a record is not listed in your department retention schedule, refer to the District-wide retention schedule, or look in the index to the schedules (provided after approval.)

BENEFITS

This retention schedule has been developed by Diane R. Gladwell, MMC, an expert in Municipal Government records, and will provide the District with the following benefits:

- Reduce administrative expenses, expedite procedures
- Free office space and computer storage space
- Reduce the cost of records storage – paper and electronic
- Eliminate duplication of effort within the District
- Find records faster
- Determine what media should be used to store records

AUTHORIZATION TO DESTROY RECORDS (Paper or Electronic Records):

Destruction or deletion of an **official (original) record** that has exceeded its retention period (and has SUBSTANTIVE CONTENT) must be **authorized prior to destruction or deletion.**

- If there is a **minimum** retention ("**Minimum 2 years**"), the destruction / deletion must be authorized before it is destroyed, as it is an official (original) record.

Copies, drafts, notes and non-records (or originals that do NOT SUBSTANTIVE CONTENT) do **NOT require authorization,** and can be destroyed "**When No Longer Required**."

- If there is **NOT** a minimum retention ("When No Longer Required"), it does NOT need to be authorized prior to destruction, as it is a preliminary draft, copy, or the Content is NOT Substantive.

On every page of the schedules (near the top, just under the column headings) are important instructions, including instructions regarding holds on destroying records. "**Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or resolution).**"

RECORDS RETENTION SCHEDULE LEGEND

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OFR (Office of Record): The department that keeps the Official (original or "record copy") record for its retention period, then authorizes destruction. Usually, it is the department that originates the record. The official (original) record may be the paper / hard copy version of the record; however the electronic record may be the official (original) record. See the "Destroy Paper after Imaged & QC'd" below for the Legal Requirements for the electronic record to be the official (original) record.

Records Description: The record series (a group of like records).

Non-Record: Documents, studies, books and pamphlets produced by outside agencies, preliminary drafts not retained in the ordinary course of business.

Retention/Disposition:
Active *(guideline)*: How long the file remains in the immediate office area
Inactive *(guideline)*: How long the file is in off-site storage, stored electronically in accordance with law (see below)
Total Retention: The total number of years the record is retained

For file folders containing documents with different retention timeframes, use the document with the longest retention time.
P = Permanent
Indefinite = No fixed or specified retention period; used for databases, because the data fields are interrelated and certain data may require minimum retention.
Vital? = Those records that are needed for basic operations in the event of a disaster.

Media Options (*guideline*) **terms used in State law**:
Mag = Electronic Computer Magnetic Media (Hard drives, Networks, USB Drives, Cloud, etc.)
Mfr = Microforms (aperture cards, microfilm, microfiche, or jackets)
Ppr = Paper, Mylar, Linen, "Hard Copy"
OD = Optical Disk or other **Unalterable Media which does not allow changes**

Scan / Import (*guideline*)**:**
"S" indicates the record should be scanned into the document imaging system;
"I" indicates the record should be electronically imported into the document imaging system;
"M" indicates the record was microfilmed

Destroy Paper after Imaged & QC'd (quality checked) / Trustworthy Electronic Record: "Yes" means the **electronic** record may serve as the **OFFICIAL** record (and the paper version may be destroyed, or the record may be electronically generated and never exist in paper format) **IF (these are the legal requirements for the electronic record to serve as the official (original) record)** the electronic record is also **placed on Unalterable Media, Immutable Cloud Media, Optical Disk (OD), DVD-R, CD-R, Blue-ray-R, or WORM**, **or microfilmed**) which is **stored in a safe & separate location**.
Employees are required to Quality Check ("QC'd") both the images and the indexes, and ensure the electronic record **contains all significant details from the original and be an adequate substitute for the original document for all purposes;** other legal mandates may apply.

Legend for legal citations (§: Section)
CC: Civil Code (CA)
CFC: California Fire Code
EVC: Evidence Code (CA)
FTB: Franchise Tax Board (CA)
HUD: Housing & Urban Develop. (US)
PC: Penal Code (CA)
UFC: Uniform Fire Code
W&I: Welfare & Institutions Code (CA)
B&P: Business & Professions Code (CA)
CCP: Code of Civil Procedure (CA)
CFR: Code of Federal Regulations (US)
FA: Food & Agriculture Code
GC: Government Code (CA)
LC: Labor Code (CA)
PRC Public Resources Code
USC: United States Code (US)
CBC: California Building Code
CCR: California Code of Regulations (CA)
EC: Elections Code (CA)
FC: Family Code (CA)
H&S: Health & Safety Code (CA)
Ops. Cal. Atty. Gen..: Attorney General Opinions (CA)
R&T: Revenue & Taxation Code (CA)
VC: Vehicle Code (CA)

District Wide
Records Retention Schedule

RECORDS RETENTION SCHEDULE: DISTRICT-WIDE STANDARDS
(Used by ALL Departments)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.								
Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.								
HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
DISTRICT-WIDE (Used by ALL Departments)								
Lead Dept. (managing the contract)	DW-001	Agreements / Contracts - **ADMINISTRATIVE RECORDS** (Correspondence with contractor where the Content relates in a substantive way to the performance of the contract, etc.)	Completion + 10 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Also see Grants. Covers E&O Statute of Limitations (insurance certificates are filed with agreement); Statute of Limitations: Contracts & Spec's=4 years, Wrongful Death=comp. + 5 years, CCP §§336(a), 337 et. seq., GC §60201
Lead Dept (Managing the Agreement / Contract)	DW-002	Agreements / Contracts: **UNSUCCESSFUL BIDS, PROPOSALS / RESPONSES to RFPs** (Request for Proposals) **/ RFQs** (Request for Qualifications) that don't result in a contract	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Includes unopened bids; GC §60201
Lead Dept.	DW-003	Association Records (external associations - e.g., ACWA, etc.)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Non-records; GC §60201 et seq.
Lead Dept.	DW-004	Clippings / Newspaper Clippings	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Non-records; GC §60201 et seq.
Lead Dept.	DW-005	Committees, Task Forces, Associations, Commissions, / Boards: **External** Organizations (e.g. Association of California Water Agencies, etc.)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Non-records
Lead Dept.	DW-006	Copies / duplicates of any record	Copies - When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60200
Lead Dept.	DW-007	Correspondence - **Regulatory Agencies**	Minimum 10 years	Yes: While Active Issues	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; some correspondence with Regulatory Agencies needs to be retained for longer periods of time than other types of correspondence; GC §60201

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Adopted:

RECORDS RETENTION SCHEDULE: DISTRICT-WIDE STANDARDS
(Used by ALL Departments)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.								
Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.								
HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
Dept. that **Authors** Document or Receives the District's Original Document	DW-008	Correspondence - **Routine** **(IF CONTENT relates in a SUBSTANTIVE way to the conduct of the public's business)** (e .g. Administrative Files, Communications, E-mail / email with SUBSTANTIVE content, General Files, Letters, Memorandums, Miscellaneous Reports, etc. Does NOT include Regulatory Agency Correspondence) SUBSTANTIVE synonyms: Significant, Meaningful, Considerable	Minimum 2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	ONLY IF the Content relates in a substantive way to the conduct of the public's business; City of San Jose v. Superior Court (2017) 2 Cal.5th 608 GC §60201

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RECORDS RETENTION SCHEDULE: DISTRICT-WIDE STANDARDS
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Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.								
Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.								
HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
Dept. that **Authors** Document or Receives the District's Original Document	DW-009	Correspondence - **TRANSITORY / PRELIMINARY DRAFTS**, Interagency / Intraagency Memoranda NOT retained in the ordinary course of business **Content NOT Substantive**, / NOT made / retained for the purpose of preserving the informational content for future reference (e.g. calendars, checklists, e-mail / email, social media posting, employee directories, flyers, invitations, instant messaging, inventories, logs, mailing lists, meeting room registrations, PowerPoint presentations, speaker cards, speech notes, Teams videoconference chats, notes / recordings, supply inventories, telephone messages, text messages, transmittal letters, thank yous, requests from other cities, preliminary notices for construction projects, undeliverable envelopes / returned mail, voice mails, webpages, etc.)	When No Longer Required		Mag, Ppr			Electronic and paper records are filed and retained based upon their **CONTENT.** E-mails, electronic records, or social media postings where either the **CONTENT relates in a SUBSTANTIVE way to the conduct of the public's business,** or ARE made or retained for the purpose of preserving the informational content for future reference **are SAVED by printing them out and placing them in a file folder, or saving them electronically**. If not mentioned here, consult the Attorney to determine if a record is considered transitory / preliminary draft. GC §§60201, 7927.500, 64 Ops. Cal. Atty. Gen. 317 (1981)); City of San Jose v. Superior Court (2017) 2 Cal.5th 608
Lead Dept.	DW-010	Drafts / Notes: Drafts that are revised (retain final version)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	As long as the drafts and notes are not retained in the "Regular Course of Business". GC §§60201, 7927.500

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(Used by ALL Departments)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.								
Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.								
HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
Lead Dept. (Managing the Grant)	DW-011	Grants **(SUCCESSFUL)** Applications (successful), copy of grant agreement, copies of invoices, program rules, regulations / procedures, reports to grant funding agencies, correspondence, audit records, completion records	After Funding Agency Audit, if required - **Minimum 5 years**		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District Preference (may include records pertaining to independent contractor's compensation, or expense reimbursement); Meets auditing standards; Uniform Admin. Requirements for Grants to Local Governments is 3 years from expenditure report or final payment of grantee or subgrantee; 2 CFR 200.334; 24 CFR 91.105(h), 92.505, 570.490, & 570.502; GC §60201; GC §8546.7
Lead Dept. (Managing the Grant)	DW-012	Grants: **UNSUCCESSFUL** (Applications, Correspondence, etc.)	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Human Resources	DW-013	Personnel Files - (**Department-level Copies**) Send all originals to Human Resources	Do Not Retain In Departments	Before Separation	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Ensure records kept in District files comply with District policy; Originals are maintained by Human Resources. Supervisors notes should be maintained in a separate folder and be incorporated in the employee's annual performance review; 29 CFR 1602.31 & 1627.3(b)(ii), 8 CCR §3204(d)(1) et seq., GC §§12946, 12960, 60201
Human Resources	DW-014	Personnel Files - Department-level **Supervisor's Notes**	When No Longer Required	Before Separation	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Preliminary Drafts; Supervisors notes should maintained in a separate folder and be incorporated in the employee's annual performance review; 29 CFR 1602.31 & 1627.3(b)(ii), 8 CCR §3204(d)(1) et seq., GC §§12946, 12960, 60201
Lead Dept.	DW-015	Photographs, Videos (other than Board Meetings)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Preliminary Drafts (retention is placed on the record the photograph is used in - Brochure, Report, etc.); destroy unnecessary photographs. GC §60201

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Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.								
Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.								
HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
Lead Dept.	DW-016	Reference Materials: Policies, Procedures, Handbooks, Manuals, Plans (if not provided in the schedule), Standard Operating Procedures (SOPs), Studies, Reports (if not provided in the schedule.): etc.: Produced by **OTHER Departments**	When Superseded		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Copies; GC §60200
(Outside Organization)	DW-017	Reference Materials: Policies, Procedures, Handbooks, Manuals, Plans (if not provided in the schedule), Standard Operating Procedures (SOPs), Studies, Reports (if not provided in the schedule.): etc.: Produced by **OUTSIDE ORGANIZATIONS** (ACWA, CSDA, etc.)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Non-Records
Authoring Dept.	DW-018	Reference Materials: Policies, Procedures, Handbooks, Manuals, Plans (if not provided in the schedule), Standard Operating Procedures (SOPs), Studies, Reports (if not provided in the schedule.): Manuals / Reports: Produced by **YOUR Department**	Minimum of Superseded + 2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Lead Dept.	DW-019	Reports, Studies (**Historically significant)**	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Administratively and Historically significant, therefore retained permanently; GC §60201
Lead Dept.	DW-020	Reports, Studies (**other than Historically significant**)	10 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Information is outdated after 10 years; GC §60201
Lead Dept.	DW-021	Special Projects / Subject Files	Minimum 2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201 et seq.

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RECORDS RETENTION SCHEDULE: DISTRICT-WIDE STANDARDS
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Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.								
Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.								
HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
Lead Dept.	DW-022	Training **Database** (Target Solutions / Vector Solutions) (Ethics Training, Harassment Prevention Training, Safety Training, Tailgates, Workplace Violence Training, etc.)	Indefinite - Minimum Separation of Employee + 5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC and OD	District preference; Ethics, Harassment & Workplace Violence Training is 5 years; Calif. Labor Division is required to keep their OSHA records 7 years; EEOC/FLSA/ADEA (Age) requires 3 years for promotion, demotion, transfer, selection, or discharge; State Law requires 4 years for personnel actions; 8 CCR §3203 et seq., 29 CFR 1627.3(b)(ii), LC §6429(c); GC §§12946, 12960, 53235.2(b), 53237.2(b), LC §6401.9(f); GC §60201
Lead Dept.	DW-023	Training presented by District Staff - **ALL COURSE RECORDS** (Attendance Rosters, Sign-in Sheets, Outlines / Materials; includes Ethics, Harassment, Workplace Violence, Safety Training, Tailgates)	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Ethics, Harassment & Workplace Violence Training is 5 years; Calif. Labor Division is required to keep their OSHA records 7 years; EEOC/FLSA/ADEA (Age) requires 3 years for promotion, demotion, transfer, selection, or discharge; State Law requires 4 years for personnel actions; 8 CCR §3203 et seq., 29 CFR 1602.31; LC §6429(c); GC §§12946, 12960, 60201, 53235.2(b), 53237.2(b); LC §6401.9(f),
Lead Dept.	DW-024	Visitor Logs / Registers	1 year		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201 et. seq.
Lead Dept.	DW-025	Waivers for Tours, Events	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201

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Administration
General Manager

RECORDS RETENTION SCHEDULE: ADMINISTRATION / GENERAL MANAGER

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
If the record is not listed here, refer to the Retention for District-Wide Standards.								
Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.								
HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
ADMINISTRATION / GENERAL MANAGER								
Admin / General Manager	GM-001	Litigation / Lawsuits	Final Resolution + 5 years	Yes: Until Resolution	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Covers various statute of limitations; CCP §§ 337 et seq.; GC §§ 911.2, 60201
Admin / General Manager	GM-002	Projects / Issues (Issues / projects will vary over time)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201

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Administration
Board Secretary

RECORDS RETENTION SCHEDULE: ADMINISTRATION / BOARD SECRETARY

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
If the record is not listed here, refer to the Retention for District-Wide Standards								
Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder								
HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
ADMINISTRATION / BOARD SECRETARY								
Admin. / Board Secretary	SEC-001	Agendas, Agenda Packets, Agenda Staff Reports - **District Board of Directors / Budget Committee, Engineering Committee, Finance Committee (Standing Subcommittees)**	P	Yes: Before Meeting Date	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Admin. / Board Secretary	SEC-002	Agendas, Agenda Packets, Agenda Staff Reports - **Agenda Review Committee, etc. (Ad-Hoc Subcommittees - Advisory only)**	2 years	Yes: Before Meeting Date	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Admin. / Board Secretary	SEC-003	Agreements / Contracts **- INTRA-AGENCY, JPA, MOUS, POLITICAL, WATER AGENCIES** Agreement / Contract includes all contractual obligations (e.g. Successful Proposal / Scope of Work, Amendments)	P	Yes: Before Completion	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Standard municipal government practice; All infrastructure, JPAs, & Mutual Aid contracts should be permanent for emergency preparedness; Statute of Limitations is 4 years; 10 years for Errors & Omissions; land records are permanent by law; CCP §§337. 337.1(a), 337.15, 343; GC §60201, Contractor has retention requirements in 48 CFR 4.703
Admin. / Board Secretary	SEC-004	Agreements / Contracts (originals) - **CUSTODIAL, LEASES, MAINTENANCE** (where Errors / Omissions / Professional Liability Insurance is NOT applicable) Agreement / Contract includes all contractual obligations / Insurance Certificates (e.g. Scope of Work / Successful Proposal / Amendments, Change Orders / Task Orders) Examples: Copier Leases, Custodial, Equipment Purchasing / Leases, Janitorial, Maintenance, Landscape Maintenance etc.	Completion + 5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Errors & Omissions is not applicable; CCP §§336(a), 337 et. seq., GC §60201

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Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
If the record is not listed here, refer to the Retention for District-Wide Standards								
Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder								
HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
Admin. / Board Secretary	SEC-005	Agreements / Contracts (originals) **- Land / Real Property Purchase / Sell, Water Supply** Agreement / Contract includes all contractual obligations / Insurance Certificates (e.g. Scope of Work / Successful Proposal / Amendments / Change Orders / Task Orders) Examples of Infrastructure: Architects, buildings, bridges, development, property restrictions, reservoirs / reservoir maintenance, utilities, water infrastructure (water lines, water mains, pump stations, treatment facilities, etc.)	P	Yes: Before Completion	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference for emergency response; Covers E&O Statute of Limitations (insurance certificates are filed with agreement); Statute of Limitations: CCP §§336(a), 337 et. seq., GC §60201
Admin. / Board Secretary	SEC-006	Agreements / Contracts (originals) **- Consulting, Professional Services, Water Purchasing, NON-Infrastructure** (where Errors / Omissions / Professional Liability Insurance required) Agreement / Contract includes all contractual obligations, Insurance Certificates (e.g. Scope of Work / Successful Proposal / Amendments / Change Orders / Task Orders) Examples of NON-Infrastructure: Attorney Services, Consultants, Franchises, Landscape Design / Installation, Personnel, Professional Services, Water purchasing agreements etc.	Completion + 10 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Covers E&O Statute of Limitations (insurance certificates are filed with agreement); Statute of Limitations: CCP §§336(a), 337 et. seq., GC §60201

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RECORDS RETENTION SCHEDULE: ADMINISTRATION / BOARD SECRETARY

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
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HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
Admin. / Board Secretary	SEC-007	Annexations / Acquisitions	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Admin. / Board Secretary	SEC-008	Association Records (external associations - e.g., ACWA, CSDA, etc.)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Non-records; GC §60201 et seq.
Admin. / Board Secretary	SEC-009	Board of Directors Vacancies (Affidavit of Posting, Applications, Correspondence, Notices, etc.)	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201
Admin. / Board Secretary	SEC-010	Chronological History of Board Members	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Historical Value; GC §60201
Admin. / Board Secretary	SEC-011	District Formation, Changes to Director's Boundaries (Redistricting), Shape Files	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Part of the Agenda Packet, which is maintained permanently; Required for formal changes to the district approved by the Board only; GC §60201
Admin. / Board Secretary	SEC-012	District's Counsel (Attorney) Opinions	Minimum 2 years	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Admin. / Board Secretary	SEC-013	Economic Interest Filings (FPPC Form 602 or 635) - **Lobbyist Authorization / Reporting**	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After 2 years	2 CCR 18615(f)
Admin. / Board Secretary	SEC-014	Elections - GENERAL, **WORKING** / ADMINISTRATION Files (Correspondence, Notices, Postings, Precinct Workers, County Election Services, etc.)	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Used for a model for the next election, GC §60201
Admin. / Board Secretary	SEC-015	Elections - **HISTORICAL** File (Sample ballot, copies of results / resolution declaring results)	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Retained for Historical Value, GC §60201

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Admin. / Board Secretary	SEC-016	Elections - Petitions (Initiative, Recall / Referendum) - **IF INSUFFICIENT**	Final Examination + 1 year after petition examination		Ppr			Not accessible to the public; The 8 month retention applies after election results, or final examination if no election, unless there is a legal or FPPC proceeding. EC §§17200(b)(3), 17400
Admin. / Board Secretary	SEC-017	Elections - Petitions (Initiative, Recall / Referendum) - **IF SUFFICIENT**	Results + 8 months		Ppr			Not accessible to the public; The 8 month retention applies after election results, or final examination if no election, unless there is a legal or FPPC proceeding. EC §§17200(b)(3), 17400
Admin. / Board Secretary	SEC-018	Elections: Correspondence, Notifications / Publications, Certificate of Election, etc.	4 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference (historical purposes); GC §60201
Admin. / Board Secretary	SEC-019	Ethics Training Certificates for Board of Directors	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §53235.2(b)
Admin. / Board Secretary	SEC-020	Facility Use Requests and Permissions - Board Chambers	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201 et seq.
Admin. / Board Secretary	SEC-021	FPPC 460, 470, 501, 410 Series Forms - **Campaign Disclosures**	4 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC	County ROV maintains original statements; GC §81009(f)&(g)
Admin. / Board Secretary	SEC-022	FPPC 700 Series Forms (Statement of Economic Interests): **DESIGNATED EMPLOYEES / CONSULTANTS** (specified in the District's Conflict of Interest code)	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC	District maintains original statements; GC §81009(e)&(g)
Admin. / Board Secretary	SEC-023	FPPC 700 Series Forms (Statement of Economic Interests): **PUBLIC OFFICIALS** (elected / not elected. Includes District Board Members, General Manager)	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC	District preference (only required for 4 years); GC §81009(f)&(g)

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Admin. / Board Secretary	SEC-024	FPPC Form 801 (Gift to Agency Report)	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC	Must post on website; GC §81009(e)
Admin. / Board Secretary	SEC-025	FPPC Form 802 (Tickets Provided by Agency Report)	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC	Must post on website for 4 years; GC §81009(e)
Admin. / Board Secretary	SEC-026	FPPC Form 803 (Behested Payment Report)	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC	GC §81009(e); FPPC Regulation 18734(c)
Admin. / Board Secretary	SEC-027	FPPC Form 806 (Agency Report of Public Official Appointments)	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC	Must post on website; 2 CCR 18702.5(b)(3); GC §60201; GC §81009(e)
Admin. / Board Secretary	SEC-028	Historical Records: Copyrights, Logo, Patents, Name Changes, Awards, Trademarks, etc.	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District Secretary Determines Historical Significance; GC §60201
Admin. / Board Secretary	SEC-029	Litigation Files / Lawsuits / Court Case Files	Minimum Final Resolution + 5 years	Yes: Until Settlement	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; CCP § 337 et seq.; GC §§ 911.2, 60201, 60201.6; PC §832.5(b)
Admin. / Board Secretary	SEC-030	Minutes - **District Board of Directors / Budget Committee, Engineering Committee, Finance Committee (Standing Subcommittees)**	P	Yes: Before Meeting Date	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201(d)(3)
Admin. / Board Secretary	SEC-031	Minutes - **Agenda Review Committee, etc. (Ad-Hoc Subcommittees - Advisory only)**	2 years	Yes: Before Meeting Date	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Admin. / Board Secretary	SEC-032	Notices: Affidavits of Postings / Publications	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Brown Act challenges must be filed within 30 or 90 days of action; GC §§60201, 54960.1(c)(1)

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RECORDS RETENTION SCHEDULE: ADMINISTRATION / BOARD SECRETARY

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HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
Admin. / Board Secretary	SEC-033	Oaths of Office (Board of Directors)	Separation + 6 years	Yes (all)	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Statute of Limitations: Public official misconduct is discovery of offense + 4 years, retirement benefits is 6 years from last action; GC §§36507, 60201; PC §§801.5, 803(c); 29 USC 1113
Admin. / Board Secretary	SEC-034	Ordinances / Regulations / Resolutions	P	Yes (all)	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201 et. seq.
Admin. / Board Secretary	SEC-035	Prop. 218 Fees / Charges: **Ballots / protest letters**	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §§53753(e)(2), 53755(d)
Admin. / Board Secretary	SEC-036	Prop. 218 Fees / Charges: **Master Mailing List**	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201
Admin. / Board Secretary	SEC-037	Prop. 218 Fees / Charges: **Undeliverable Mail**	3 months		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Transitory records not retained in the ordinary course of business; GC §60201
Admin. / Board Secretary	SEC-038	Public Records Act Requests	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Admin. / Board Secretary	SEC-039	Recordings: **AUDIO RECORDINGS / VIDEO RECORDINGS** of District Board meetings / Audio Tapes	Minimum 4 years		Mag			District preference; Legally required for 90 days for Video, 30 days for audio; GC §§54953.5(b), 53161, 60201 et seq.
Admin. / Board Secretary	SEC-040	Records Destruction Authorization Forms / Authorization to Destroy Paper to Rely on the Image as the Original	10 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201 et. seq.
Admin. / Board Secretary	SEC-041	Records Retention Schedules - Authorization for Amendments to Retention Schedules	10 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201 et. seq.

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HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
Admin. / Board Secretary	SEC-042	Resolutions - **District Board of Directors / Budget Committee, Engineering Committee, Finance Committee (Standing Subcommittees)**	P	Yes: Before Meeting Date	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201 et. seq.
Admin. / Board Secretary	SEC-043	Minutes - **Agenda Review Committee, etc. (Ad-Hoc Subcommittees - Advisory only)**	2 years	Yes: Before Meeting Date	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Admin. / Board Secretary	SEC-044	Secretary of State Statement of Facts / Roster of Public Officials	1 year		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201 et. seq.
Admin. / Board Secretary	SEC-045	Subpoenas / Summons	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201

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Administration
Emergency Management

RECORDS RETENTION SCHEDULE: EMERGENCY MANAGEMENT

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Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.								
HOLDS: Litigation, complaints, claims, public records act requests, audits, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
ADMINISTRATION / EMERGENCY MANAGEMENT								
Admin. / Board Secretary	EM-001	Agreements, MOUs: Municipal Water Dist of Orange County (MWDOC) and Water Emergency Response Organization of Orange County (WEROC)	Copies - When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Board Secretary retains originals; GC §60200
Admin. / Emergency Manager	EM-002	Emergency Preparedness Plans: Emergency Response Plan / Risk / Resiliency Assessment / Hazard Mitigation Plan / Vulnerability Assessment, etc.	Superseded Minimum 5 years	Yes: Until Superseded	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Confidential; 42 USC 300i-2(c); GC §60201
Admin. / Emergency Manager	EM-003	Facilities / Listing of Equipment / Asset Lists	Superseded - Minimum 5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Admin. / Emergency Manager	EM-004	FEMA / OES claims (Federal Emergency Management Agency / Office of Emergency Services Claims) All supporting backup: Claim Forms, copies of invoices, regulations / procedures, reports, correspondence, audit records, completion records	10 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference (may include records pertaining to independent contractor's compensation, or expense reimbursement); Meets auditing standards; Uniform Admin. Requirements for Grants to Local Governments is 3 years from expenditure report or final payment of grantee or subgrantee; 2 CFR 200.334; 24 CFR 91.105(h), 92.505, 570.490, & 570.502; GC §60201; GC §8546.7
Admin. / Emergency Manager	EM-005	Reports to Municipal Water Dist of Orange County (MWDOC) and Water Emergency Response Organization of Orange County (WEROC)	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201

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Adopted:

Administration

Public Affairs

Community Relations

Governmental Affairs

RECORDS RETENTION SCHEDULE: ADMINISTRATION / PUBLIC AFFAIRS, COMMUNITY RELATIONS and GOVERNMENTAL AFFAIRS

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
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HOLDS: Litigation, complaints, claims, public records act requests, audits, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
ADMINISTRATION / PUBLIC AFFAIRS, COMMUNITY RELATIONS and GOVERNMENTAL AFFAIRS								
Admin. / Public Affairs, Community Relations, Govern. Affairs	PA-001	Education Programs	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Admin. / Public Affairs, Community Relations, Govern. Affairs	PA-002	FPPC Lobbyist Authorization, Registration / Reporting (FPPC Form 602 / 635)	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	2 CCR 18615(f); GC §81009(e) and (g)
Admin. / Public Affairs, Community Relations, Govern. Affairs	PA-003	Legislation Tracking (State / Federal)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201 et seq.
Admin. / Public Affairs, Community Relations, Govern. Affairs	PA-004	Legislative Advocacy - Correspondence Supporting / Opposing Proposed Legislation (State / Federal)	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201 et seq.

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RECORDS RETENTION SCHEDULE: ADMINISTRATION / PUBLIC AFFAIRS, COMMUNITY RELATIONS and GOVERNMENTAL AFFAIRS

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HOLDS: Litigation, complaints, claims, public records act requests, audits, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
Admin. / Public Affairs, Community Relations, Govern. Affairs	PA-005	Media Releases / Press Release / Fact Sheets	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201 et seq.
Admin. / Public Affairs, Community Relations, Govern. Affairs	PA-006	Public Notices - Potable Water (Tier 1, 2, / 3)	3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	22 CCR §64470; GC §60201
Admin. / Public Affairs, Community Relations, Govern. Affairs	PA-007	Special Projects & Fact Sheets (Issues and/or projects will vary over time)	When No Longer Required	Yes: While Active Issues	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201
Admin. / Public Affairs, Community Relations, Govern. Affairs	PA-008	Surveys / Questionnaires (that the District issues) If a summary of the data is compiled, the survey forms are considered a draft / transitory record, / can be destroyed as drafts (When No Longer Required)	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201 et seq.

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HOLDS: Litigation, complaints, claims, public records act requests, audits, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
Admin. / Public Affairs, Community Relations, Govern. Affairs	PA-009	Water Quality Reports / Consumer Confidence Reports	P	Yes: While Active Issues	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; State law requires 12 years, federal 10 years; 40 CFR 141.33(a); 40 CFR 141.155. 22 CCR §64470; 22 CCR §64483(g); GC §60201 EL TORO

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Administration
Water Use Efficiency

RECORDS RETENTION SCHEDULE: WATER USE EFFICIENCY

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ADMINISTRATION / WATER USE EFFICIENCY								
Admin. / Water Use Efficiency	WUE-001	Conservation **Database** (may be Municipal Water Dist of Orange County (MWDOC)	Indefinite - Minimum 5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Data Fields / Records are interrelated; meets municipal government auditing standards; GC §60201
Admin. / Water Use Efficiency	WUE-002	Contact and Correspondence **Database** (Constant Contact)	Indefinite - Minimum 5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Admin. / Water Use Efficiency	WUE-003	Audits (Conservation): Commercial, Landscape, Residential, etc.	3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Admin. / Water Use Efficiency	WUE-004	Best Management Practices	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Admin. / Water Use Efficiency	WUE-005	Conservation Education Programs	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Admin. / Water Use Efficiency	WUE-006	Conservation Events, including contracts / waivers	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Admin. / Water Use Efficiency	WUE-007	Contest Art / Certificates	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Admin. / Water Use Efficiency	WUE-008	Customer Log	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Admin. / Water Use Efficiency	WUE-009	Photo Releases	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201

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HOLDS: Litigation, complaints, claims, public records act requests, audits, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
Admin. / Water Use Efficiency	WUE-010	Rebate Requests / Customer Rebates: **ALL Approved** Choice Program, High-Efficiency Toilet Rebate, Water-Free Urinal Rebate, Clothes Washer Rebate, Hot Water Recirculation System Rebate, Weather-based Irrigation Controllers, etc.	7 years	Yes: Until Paid	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference to meet auditing standards and MWD's or MWDOC's requirements; GC §60201
Admin. / Water Use Efficiency	WUE-011	Rebate Requests / Customer Rebates: **ALL Denied** (Rebate not approved)	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Admin. / Water Use Efficiency	WUE-012	Reports: CUWCC (California Urban Water Conservation Council), Conservation, Municipal Water Dist of Orange County (MWDOC), etc.	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Admin. / Water Use Efficiency	WUE-013	Water Loss Audits	Minimum 2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Admin. / Water Use Efficiency	WUE-014	Water Use Efficiency Projects	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201 et seq.
Admin. / Water Use Efficiency	WUE-015	Water Use Efficiency Surveys	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60200

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Adopted:

Engineering

RECORDS RETENTION SCHEDULE: ENGINEERING

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
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Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.								
HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
ENGINEERING								
Engineering	ENG-001	Bonds / Bid Bond, Labor / Materials, Performance Bonds, Letters of Credit	Release of Bond / Letter of Credit		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Security; GC §60201
Engineering	ENG-002	CEQA Documents: Environmental Determinations: Environmental Impact Reports (EIRs), Negative Declarations, Categorical Exemptions, etc.) **Correspondence / Staff Notes** that provide insight into the project / the agency's CEQA compliance with respect to the project	Project Approval or Denial + 180 days		Mag, Mfr, OD, Ppr		Yes: After QC & OD	Not all internal communications and notes are required to be saved; "E-mails that do not provide insight into the project or the agency's CEQA compliance with respect to the project — are not within the scope of section 21167.6, subdivision (e) and need not be retained." Golden Door Properties, LLC v. Superior Court of San Diego County (County of San Diego, et al., Real Parties in Interest) (53 Cal.App.5th 733); PRC 21167,6; GC §60201
Engineering	ENG-003	Cross Connection / Backflow Testing (Backflow Prevention Assembly Repairs, Replacement Relocation, Cross-Connection Test Results, Public Outreach and Educational Materials)	3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	SWRCB Cross-Connection Control Policy Handbook Section 3.5.1 requires records be retained for the previous three calendar years, GC §60201
Engineering	ENG-004	Cross-Connection Hazard Assessment Records	2 Most Recent		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	SWRCB Cross-Connection Control Policy Handbook Section 3.5.1 requires the two most recent Hazard Assessments be retained; GC §60201
Engineering	ENG-005	Engineering Studies / Reports / Corrosion Studies / Reports / Pipeline Integrity Studies / Reports / Root Cause Analysis Reports	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District Preference; GC §60201
Engineering	ENG-006	Fire Flow (for proposed Development projects - may or many not result in a Work Order)	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District Preference; GC §60201
Engineering	ENG-007	Geographic Information System (GIS)	Indefinite	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Data is interrelated; GC §60200, 60201 et seq.
Engineering	ENG-008	Plans, Reports, / Studies, Water System Master Plans, Urban Water Management Plan	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §60201 et seq.

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HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
Engineering	ENG-009	Reservoirs / Steel Tanks - Major Assessments, Upgrades / Painting	P	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §60201 et seq.
Engineering	ENG-010	Standard Drawings / Construction Standards Authored by the District	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District Preference; GC §60201
Engineering	ENG-011	Underground Service Alerts (USA's) / Dig Alerts	3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; entered into DigAlert Software; the Excavator, Operator and the Regional Notification Center all have an obligation to retain the notice for 3 years; GC §§4216.2(f); GC §60201
Engineering	ENG-012	Will Serve Letters / Water Availability Letters	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §60201 et seq.
Engineering	ENG-013	Work Orders / CIP (Capital Improvement Project) Files / Development Infrastructure **Large Format Drawings** Design Drawings (finals), Record Drawings ("As Builts")	P	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	For Disaster Recovery Purposes; Final environmental determinations are required to be kept a "reasonable period of time"; 14 CCR §15095(c); GC §60201 et seq.
Engineering	ENG-014	Work Orders / CIP (Capital Improvement Project) Files Change Orders, Drillers Logs, Deeds, Easements, Environmental Documents (Final EIRs, Categorical Exemptions, Negative Declarations), Materials Testing Reports, NIB (Notice Inviting Bids), Notice of Completion, Regulatory Agency Approvals, RFPs (Request for Proposal), RIB (Request Inviting Bids), Right of Way, Shop Drawings, Specifications, Structural Plans, Submittals, Surveys, Permanent Variances, etc.	P	Yes: Until Completed	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	For disaster preparedness purposes; GC §60201 et seq.

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HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
Engineering	ENG-015	Work Orders / Development / Applicant Projects: Subdivisions / Tract Files Water Service Agreements. Easements, Final Drawings, Inspections, Rights of Way, Rights of Entry that run with the land, Studies / Reports (Hydrology, Geotechnical, etc.)	P	Yes: Until Completed	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §60201

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Human Resources

RECORDS RETENTION SCHEDULE: HUMAN RESOURCES

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HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
HUMAN RESOURCES								
Finance / Payroll OR Human Resources	HR-001	Human Resources and Payroll **Database** (ADP)	Indefinite - Minimum 7 years	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference (data is inter-related); GC §60201 et seq.
Human Resources	HR-002	1095-C, 1094-C (Employer-Provided Health Insurance Offer / Coverage) / Transmittal Form)	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Instructions state "Generally, keep copies of information returns you filed with the IRS or have the ability to reconstruct the data for at least 3 years, from the due date of the returns"; GC §60201
Human Resources	HR-003	Affirmative Action Complaints - California Civil Rights Department (CRD) / Department of Fair Employment / Housing (DFEH) / Equal Opportunity Commission (EEOC) / Harassment Claims	Final Disposition + 4 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference (same as the Personnel File); All State and Federal laws require retention until final disposition of formal complaint; State requires 4 years after action is taken; 2 CCR 11013(c); GC §§12946, 12960, 60201
Human Resources	HR-004	Benefit Plans - Employee Benefit Policies (Benefits: Health, Eye, Dental, Life Insurance, Long Term Disability, State Disability, Unemployment Insurance, etc.)	Plan Termination + 6 years	Yes: Before Expiration	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference to be consistent with District-wide standards; EEOC / ADEA (Age) requires 1 year after benefit plan termination; Federal law requires 6 years after filing date; State Law requires 2 years after action; 29 CFR 1627.3(b)(2); 29 USC 1027; GC §§12946, 12960, 60201
Human Resources	HR-005	Classification / Compensation Studies / Surveys	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Human Resources	HR-006	Deferred Compensation (District Statements)	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Produced by Deferred Comp. Provider; GC §304090, 26 CFR 31.6001.1
Human Resources	HR-007	DMV Pull Notices	When Superseded or Separation		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference (DMV record that the District considers a non-record used for reference); DMV audits every 2 years; Bureau of National Affairs recommends 2 years for all supplementary Personnel records; GC §60201

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HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
Human Resources	HR-008	Drug / Alcohol Test Results (All - Positives / Negatives) / DOT Drug and Alcohol Test Results	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	D.O.T. Requires 5 years for positive tests, 1 year for negative tests; EEOC/FLSA/ADEA (Age) requires 3 years physical examinations; State Law requires 2 years; 29 CFR 1627.3(b)(v), GC §§12946, 12960, 60201, 49 CFR 655.71 et seq.; 49 CFR 382.401 et seq.
Human Resources	HR-009	Employee Investigations / Complaints	Separation + 6 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; State Law requires 4 years from last action; EEOC / FLSA / ADEA (Age) statue of limitations is 1-3 years; Reports & Data used to compile EEO reports are required for 3 years; 29 CFR 1602 et seq & 1627.3(a)(5) and (6), 2 CCR 11013(c) 8 CCR §11040(7)(c), GC §§12946, 12960, 60201
Human Resources	HR-010	I-9s	Separation + 3 years	Yes: Until Separation	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Required for 1 year from termination or 3 years from hiring, whichever is later; EEOC / FLSA / ADEA (Age) requires 3 years for "any other forms of employment inquiry"; State Law requires 4 years; INA 274A(b)(3); INS Rule 274a.1(b)(2); 8 CFR 274a.2; 29 CFR 1627.3(b)(i); GC §§12946, 12960, 60201
Human Resources	HR-011	Job Descriptions / Classification Specifications	Superseded + 4 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	State Law requires 4 years; EEOC / FLSA / ADEA (Age) requires 1-3 years; 29 CFR 1627.3(b)(i), 29 CFR 1602.14 et seq; 2 CCR 11013(c) GC §§12946, 12960, 60201
Human Resources	HR-012	Legal Opinions (Employment Related)	Minimum 10 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §§12946, 12960, 60201
Human Resources	HR-013	OSHA Log 300, 300 A, 301, 301A, etc.	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	OSHA requires 5 years; State law requires 2 years; 8 CCR §3203(b)(1), 29 CFR 1904.33, OMB 1220-0029, 8 CCR 14300.33; GC §60201 et seq.
Human Resources	HR-014	Personnel Files - **Background File** (includes Interns) (Backgrounds, reference checks)	Separation + 6 years	Yes: Until Separation	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; State Law requires 4 years from last action; GC §§12946, 12960, 60201

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HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
Human Resources	HR-015	Personnel Files - **General File** (includes Interns) (Includes Application, Awards, Employee Benefit Enrollment Forms (birth / death / marriage certificates), Disciplinary Actions, Certifications, Commendations, Ethics Training Certificates for employees, Evaluations, Grievances, Licenses, Performance Reviews, Personnel Action Forms (original), Policy acknowledgements, Disaster Service Workers Oaths, Employee Settlement Agreements W-4s, etc. - Excludes Medical Records)	Separation + 6 years	Yes: Until Separation	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; statute of limitations for retirement benefits is 6 years from last action; EEOC/FLSA/ADEA (Age) requires 3 years for promotion, demotion, transfer, selection, or discharge; State Law requires 4 years; W-4s: IRS Regulation 31-6001-1 four years after the due date of such tax for the return period to which the records relate, or the date such tax is paid, whichever is the later.29 CFR 1602.14; 1602.31 & 1627.3(b)(ii); GC §§12946, 12960, 60201; 29 USC 1113; GC §3105; GC §53235.2(b), 53237.2(b), LC §1198.5
Human Resources	HR-016	Personnel Files - **Medical File** (Includes background checks, Class B medicals, employee Test Results / Individual Noise Exposure Measurements, Family Medical Leave records, hearing tests (Audiograms), miscellaneous medical records, pre-employment physicals, Pulmonary tests, respirator fit tests, Sharps Injury Logs, etc.	Separation + 30 years	Yes: Until Separation	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Files maintained separately; Claims can be made for 30 years for toxic substance exposure; 8 CCR §3204(d)(1) et seq., 8 CCR 5144, 29 CFR 1910.1020(d)(1)(i); GC §§12946, 12960, 60201
Human Resources	HR-017	Recruitment Files: Applications for Employment / Resumes / Recruitment Files: **Solicited:** Brochure, advertisement, unsuccessful applications (with / without interviews), selection materials, interview notes, results, etc.	4 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	State Law requires 4 years; EEOC / FLSA / ADEA (Age) requires 1-3 years; 29 CFR 1627.3(b)(i), 29 CFR 1602.14 et seq; 2 CCR 11013(c) GC §§12946, 12960, 60201
Human Resources	HR-018	Recruitment Database / Applicant Tracking System (NeoGov)	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; State Law requires 4 years; EEOC / FLSA / ADEA (Age) requires 1-3 years; 29 CFR 1627.3(b)(i), 29 CFR 1602.14 et seq; 2 CCR 11013(c) GC §§12946, 12960, 60201

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HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
Human Resources	HR-019	Sick Leave Longevity / Cash Out Approvals	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; meets municipal government auditing standards; GC §60201
Human Resources	HR-020	Unemployment Claims	Final Disposition + 5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §§12946, 12960, 60201
Human Resources	HR-021	Verifications of Employment, Child Support, etc. (From lenders / other outside companies)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Not District records (outside companies seeking to verify if an employee is currently employed); GC §60201
Human Resources	HR-022	Workers Compensation Files **ALL**	Separation + 30 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Claims can be made for 30 years for toxic substance exposure; 8 CCR 10102; 8 CCR 15400.2, 8 CCR §3204(d)(1) et seq., 29 CFR 1910.1020, GC §§12946, 12960, 60201, CCP §337 et seq.
Human Resources	HR-023	Workplace Violence – Hazard identification, evaluation, correction, incident logs, investigations, Training etc.	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	LC §6401.9(f), GC §60201

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Finance

Payroll

Risk Management

RECORDS RETENTION SCHEDULE: FINANCE

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HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
FINANCE / ADMINISTRATION								
Finance / Admin.	FIN-001	Financial System **Database** (Springbrook)	Indefinite - Minimum 7 years	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Data is interrelated; Employee compensation and reimbursements are required for 7 years; GC §60201 et seq.
Finance / Admin.	FIN-002	Audits - Operational / Single Audits (Grant Audits, Internal Audits)	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Finance / Admin.	FIN-003	Audits - Working Papers	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Preliminary drafts; GC §60201
Admin. / Board Secretary	FIN-004	Audits / Audit Reports / Annual Comprehensive Financial Report (ACFR)	Copies - When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	The Board Secretary retains the finals in the Board Agenda Packet; GC §60200
Finance / Admin.	FIN-005	Bonds / Debt / COP / Certificates of Participation / Transcripts / Disclosure Reports / Lines of Credit / Promissory Notes / Commercial Paper	Fully Defeased or Matured + 10 years	Yes: Until Maturity	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Statute of Limitations for Bonds issued by local governments are 10 years; IRS bond auditing regulations state, "…material records should generally be kept for as long as the bonds are outstanding, plus 3 years after the final redemption date of the bonds; There are specific requirements for disposal of unused bonds; CCP §§336 et seq.; 337.5(a); 26 CFR 1.6001-1(e): 26 CFR § 1.148-5(d)(6)(iii)(E); GC §§43900 et seq., 60201
Finance / Admin.	FIN-006	Budget Adjustments	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Preliminary Drafts Not Retained in the Ordinary Course of Business; GC §60200
Finance / Admin.	FIN-007	Budgets: Development, Drafts, etc.	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Preliminary Drafts Not Retained in the Ordinary Course of Business; GC §60200

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Admin. / Board Secretary	FIN-008	Budgets: Final (Adopted)	Copies - When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	The Board Secretary retains the finals in the Board Agenda Packet; GC §60200
Finance / Admin.	FIN-010	Financial Ratings / Correspondence	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Finance / Admin.	FIN-011	Financial Reports: Journals, Ledgers, Reconciliations, Registers, Reports, Transaction Histories, Balance Sheets, Batch Proofs, Trial Balance, Fixed Asset Reports / Backup (**MONTHLY / PERIODIC**)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Draft / Preliminary documents used to produce final year-end general ledger (financial database is the original); GC §60201
Finance / Admin.	FIN-012	Journal Entries / Journal Vouchers	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Meets municipal government auditing standards; GC §60201
Finance / Admin.	FIN-013	Long Range Financial Plans / Reports	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Finance / Admin.	FIN-014	State Controller's Report / Special Districts Financial Transactions Report	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201

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RECORDS RETENTION SCHEDULE: FINANCE

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FINANCE / ACCOUNTING								
Finance / Accounting	FIN-015	1099's, 1096's, DE542 (California Report of Independent Contractors)	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	IRS: 4 years after tax is due or paid (longer for auditing & contractor delinquency); Ca. FTB: 3 years; Published articles show permanent; ; IRS Reg §31.6001-1(e)(2), R&T §19530, GC §60201(d)(12); 29 USC 436
Finance / Accounting	FIN-016	Accounts **Payable** Source Records (includes Invoices, Credit Card Statements, Conference / Seminar Backup, Petty Cash, Travel Expense Reimbursements, Customer Refunds, etc.)	7 years	Yes: Until Paid	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	May contain independent contractor's compensation, expense reimbursement, or District credit card records; Meets municipal government auditing standards; Published articles show 3 - 7 years; 40 CFR 122.41(j)(2); WC §13263.2(b) et seq.; GC §60201(d)(12)
Finance / Accounting	FIN-036	Fixed Asset Retirements - Auction / Disposal / Sales / Surplused	Disposal of Asset + 2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Finance / Accounting	FIN-017	Accounts **Receivable** Source Records including Adjustments, Billings, Cash, Payments, Cash Receipts Damage to District Property / Insurance Payments, Leases, etc.	5 years	Yes: Until Paid	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Meets municipal government auditing standards; Published articles show 3 - 7 years; GC §60201
Finance / Accounting	FIN-018	Bank Statements / Checking Account Reconciliation / Bank Reconciliation (Transaction Statements, Wire Transfers, Check Listing Audit Trail, Deposits, Treasury Statements, Trustee / Investment Statements, etc.)	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference (may include records pertaining to independent contractor's compensation, or expense reimbursement); Meets auditing standards; GC §60201
Finance / Accounting	FIN-019	Check Registers	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference (a different version is presented to the Board of Directors), includes employee compensation or reimbursement; GC §60201 et seq.

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Finance / Accounting	FIN-020	Checks (Issued by the District, then cashed by the payee - maintained by the Bank)	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	May contain independent contractor's compensation; Statute of Limitations is 4 years; Meets municipal government auditing standards; GC §60201(d)(12), CCP § 337
Finance / Accounting	FIN-021	Electronic Fund Transfer Agreements / Authorizations for direct deposit to vendors bank account	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Finance / Accounting	FIN-022	Investments / LAIF (Including Arbitrage)	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Operations preference (the White is much easier to read than their pink copy); GC §60201
Finance / Accounting	FIN-023	Returned Payments (NSF, etc.) Checks / ACH (includes Water Payments)	5 years	Yes: Until Paid	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Meets municipal government auditing standards; GC §60201
Finance / Accounting	FIN-024	W-9's	Vendor Inactive + 3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Meets IRS auditing standards; GC §60201
FINANCE / PAYROLL								
Finance / Payroll OR Human Resources	FIN-025	Human Resources and Payroll **Database** (ADP)	Indefinite - Minimum 7 years	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference (data is inter-related); GC §60201 et seq.
Finance / Payroll	FIN-026	DE-6, DE-9. DE-43, W-3, / DE-166, / 941 Forms - Quarterly Payroll Tax Returns (Federal / State) IRS 5500 Forms (Employee Benefit Plans), PERS / FICA / Medicare Adjustments - OASDI, Federal Tax Deposits, Adjustments, etc.	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; IRS: 4 years after tax is due or paid (longer for auditing & contractor delinquency); Ca. FTB: 3 years; Published articles show permanent; ; IRS Reg §31.6001-1(e)(2), 26 CFR §1.6001-1, R&T §19530, GC §60201
Finance / Payroll	FIN-028	Employee Payroll File	Separation + 7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; 26 CFR §31.6001-1; GC §60201

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Finance / Payroll	FIN-029	Garnishments, Child Support, Court Orders regarding Employee Wages	Completion + 7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201 et seq.
Finance / Payroll	FIN-030	Local Government Compensation Report	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Finance / Payroll	FIN-031	Payroll Checks (copies)	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §60201(d)(12), CCP § 337
Finance / Payroll	FIN-032	Payroll Registers / Payroll Reports / Paychecks / Check Logs	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Finance / Payroll	FIN-033	Timesheets	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference to meet auditing standards; IRS Reg §31.6001-1(e)(2), R&T §19530; LC § 1174(d); 29 CFR 516.5 & 516.6(c); GC §60201 et seq.
Finance / Payroll	FIN-034	W-2's / W-3s	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; IRS: 4 yrs after tax is due or paid; Ca. FTB: 3 years; 26 CFR §31.6001-1(e)(2), R&T §19530; 29 CFR 516.5 - 516.6, 29 USC 436, GC §60201
FINANCE / PURCHASING								
Finance / Purchasing	FIN-035	Procurement **Database (**Planet Bids)	Indefinite - Minimum 2 years	Yes: Until Award	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Data is interrelated; Unaccepted Proposals for some projects are required to be retained 2 years; GC §60201 et seq.
Finance / Purchasing	FIN-037	Purchase Orders - Includes copies of bids / quotes, NIB (Notice Inviting Bids), RFPs (Request for Proposal), RIB (Request Inviting Bids)	7 years	Yes: Until Paid	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Contract employee compensation and reimbursement records are required for 7 years; GC §60201 et seq.; 40 CFR 122.41(j)(2); WC §13263.2(b) et seq.; GC §60201(d)(12)
State of California DMV	FIN-038	Vehicle Titles ("Pink Slips")	Upon Sale or Disposal		Mag, Mfr, OD, Ppr	S / I		State record transferred to new owner

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FINANCE / RISK MANAGEMENT								
Finance / Risk Manage.	FIN-039	Claims / Liability Claims	Final Resolution + 5 years	Yes: Until Resolution	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Covers various statute of limitations; CCP §§ 337 et seq.; GC §§ 911.2, 60201
Finance / Risk Manage.	FIN-041	Insurance Appraisals / Property Schedules	10 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Finance / Risk Manage.	FIN-042	Insurance **Certificates for Contracts** / Certificates of Insurance for Contracts (Except for General Counsel Contracts and Right-of-Way Encroachments)	11 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC and OD	District preference; Covers E and O Statute of Limitations (insurance certificates are filed with agreement); Statute of Limitations: CCP §§336(a), 337 et. seq.; GC §60201
Finance / Risk Manage.	FIN-043	Insurance Policies - Liability, Workers Compensation Insurance, etc.	30 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Covers various statute of limitations; CCP §§ 337 et seq.; GC §§ 911.2, 60201

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Customer Service

RECORDS RETENTION SCHEDULE: CUSTOMER SERVICE

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CUSTOMER SERVICE / ADMINISTRATION								
Customer Service / Field Office	CS-001	Customer Service / Meter Reading / Service Order **Database** (Springbrook and Legacy database)	Indefinite - Minimum 5 years	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Data is Interrelated; May include Adjustments or Water Odor / Taste / Visual Complaints; Meets municipal government auditing standards; 40 CFR 122.41(j)(2) & 40 CFR 141.33(b); 22 CCR 64470(a); GC §60201
Customer Service / Admin.	CS-002	Adjustments to Customer Accounts / Re-billing / Variances, Including Forms and Backup Documents	5 years	Yes: Until Paid	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; meets municipal government auditing standards; GC §60201
Customer Service / Admin.	CS-003	Auto-Payment Authorizations / Authorizations for ACH Transactions to Customer's Bank Accounts	Minimum 2 years	Yes: Until Paid	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Customer Service / Admin.	CS-004	Collection List of Delinquent Accounts / Penalties	When No Longer Required	Yes: While Active Issues	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference (Database is the original); GC §60201
Customer Service / Admin.	CS-005	Collections / Collection Write-offs / Collection Agency Assignments / Collections (Statements) / Write-Offs / Uncollectible Accounts	5 years	Yes: Until Paid	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Meets municipal government auditing standards; GC §60201
Customer Service / Admin.	CS-006	Customer Bankruptcies - ALL	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference (account is closed and notes indicate bankruptcy); GC §60201
Customer Service / Admin.	CS-007	Customer Concerns / Customer Complaints: Odor / Taste / Visual Complaints (In Service Order Software / Work Order Database)	Minimum 5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	5 years is required in State and Federal law for any complaints; 40 CFR 122.41(j)(2) & 40 CFR 141.33(b); 22 CCR 64470(a)
Customer Service / Admin.	CS-008	Hydrant Meters: Applications for Temporary Water Service, rules for Hydrant Meters for Construction Water Service	Completion + 2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201

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HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
Customer Service / Admin.	CS-009	Water Billing: Appeals - Payment Delinquency / Impending Discontinuation	Final Decision + 2 years		Mag, Ppr, Mfr, OD	S / I	Yes: After QC & OD	Documented or attached to Customer Record in database GC §60201; H&S §116908
Customer Service / Admin.	CS-010	Water Billing: Non-payment Notices / Notice of Payment Delinquency / Impending Discontinuation (Initial, Final)	When No Longer Required		Mag, Ppr, Mfr, OD	S / I	Yes: After QC & OD	Documented or attached to Customer Record in database GC §60201; H&S §116908
Customer Service / Admin.	CS-011	Water Billing: Report of Annual Discontinuations of Residential Service	Minimum 2 years		Mag, Ppr, Mfr, OD	S / I	Yes: After QC & OD	Must post to Website; H&S §116918; GC §60201
CUSTOMER SERVICE / FIELD OFFICE								
Customer Service / Field Office	CS-012	Customer Service / Meter Reading / Service Order **Database** (Springbrook and Legacy database)	Indefinite - Minimum 5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Data is Interrelated; May include Adjustments or Water Odor / Taste / Visual Complaints; Meets municipal government auditing standards; 40 CFR 122.41(j)(2) & 40 CFR 141.33(b); 22 CCR 64470(a); GC §60201

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Operations

RECORDS RETENTION SCHEDULE: OPERATIONS
(Operations And Maintenance, Production, Treatment Plants, Water Quality)

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OPERATIONS / ELECTRICAL / SUPPORT SERVICES / TRANSMISSION & DISTRIBUTION								
Customer Service	OPS-001	Customer Service / Meter Reading **Database** (Springbrook)	Indefinite - Minimum 5 years	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Data is Interrelated; Meets municipal government auditing standards; GC §60201
Ops / Lead Div.	OPS-002	SCADA **Database** (Supervisory Control / Data Acquisition)	Indefinite (Perm)	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Data is interrelated; GC §§60201
Ops / Lead Div.	OPS-003	Work Orders / Service Requests / Investigations - **NOT entered in CMMS Database** (or partial information entered into CMMS Database) (Division providing service retains originals; Division requesting service is considered a copy)	Indefinite - Minimum 5 years	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; CCP §§338 et seq., 340 et seq., 342, GC §60201
Ops / Electrical / Support Services / Trans. & Distrib.	OPS-004	Aboveground Storage Tanks - Diesel / Gasoline (Agency Owned) **Inspections, Maintenance, Repairs, Vapor Testing**	Life of the Tank		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; EPA FAQs recommend Life of the Tank; applies to both Tier I and Tier II Tanks; (Tier II tanks are required to have an integrity test every 20 years); GC §60201
Ops / Lead Div.	OPS-005	Confined Space Entries / Hot Work Permits / Lockout-Blockouts / Lockout-Tagouts / Energy Control Procedures (ECP) / Air Monitoring Calibrations	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Cal/OSHA requests 3 years of documents of Lockout-Blockouts / Lockout-Tagouts during audits; 8 CCR 5157(d)(14) & (e)(6); 29 CFR 1910.146(e)(6); GC §60201
Ops / Electrical / Support Services / Trans. & Distrib.	OPS-006	Daily Pumping Status Reports / Daily Sodium Hypochlorite Generator Site Log ,Intertie readings, Turnout Readings, etc.	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	; GC §60201

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RECORDS RETENTION SCHEDULE: OPERATIONS
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Ops / Electrical / Support Services / Trans. & Distrib.	OPS-007	Electric / Power Consumption and Scheduling	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Ops / Electrical / Support Services / Trans. & Distrib.	OPS-008	Monitoring Well Logs	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Ops / Lead Div.	OPS-009	Operations / Maintenance Manuals / O&M Manuals	Disposal of Equipment		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Ops / Electrical / Support Services / Trans. & Distrib.	OPS-010	Pesticide / Herbicide Applications	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference (agricultural pesticide records are required for 2 years); GC §60201; 3 CCR 6623
Ops / Electrical / Support Services / Trans. & Distrib.	OPS-011	Reservoirs / Steel Tanks - Inspections, Roofing, Minor Repairs	P	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201 et seq.

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Ops / Electrical / Support Services / Trans. & Distrib.	OPS-012	Reservoirs: **Flushing, Disinfection / Cleaning**	Minimum 3 years		Mag, Mfr, OD, Ppr	S / I	Yes - After QC & OD	Flushing, Disinfection, Inspection and Cleaning is required for 3 years; 22 CCR §64604(c); GC §60201
Ops / Electrical / Support Services / Trans. & Distrib.	OPS-013	Reservoirs: **Inspection Reports, Maintenance Records**	P		Mag, Mfr, OD, Ppr	S / I	Yes - After QC & OD	District preference; GC §60201
Ops / Electrical / Support Services / Trans. & Distrib.	OPS-014	Safety Inspections: Facility Inspection Records / Equipment Inspections Records / Hazardous Waste Inspections, etc.	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Ops / Electrical / Support Services / Trans. & Distrib.	OPS-015	Sanitary Surveys	10 years		Mag, Mfr, OD, Ppr	S / I	Yes - After QC & OD	22 CCR §64470 GC §60201
Ops / Electrical / Support Services / Trans. & Distrib.	OPS-016	Site Surveys / Cross Connection	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; SWRCB Cross-Connection Control Policy Handbook Section 3.5.1(a) requires records to be retained at least the previous 3 calendar years; GC §§60201 et seq.

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Ops / Lead Div.	OPS-017	Standard Operating Procedures / SOPs	Superseded		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Ops / Electrical / Support Services / Trans. & Distrib.	OPS-018	Stormwater / Discharge **Monitoring Reports**: NPDES Monitoring Reports	Minimum 3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; NPDES Monitoring records required for 3 years; 40 CFR §§122.21, 122.41, 122.44; CCP §337 et seq.
Ops / Electrical / Support Services / Trans. & Distrib.	OPS-019	Stormwater / Discharge **Permits**:- NPDES Permits	Superseded + 3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; NPDES Monitoring records required for 3 years; 40 CFR §§122.21, 122.41, 122.44; CCP §337 et seq.
Ops / Electrical / Support Services / Trans. & Distrib.	OPS-020	Underground Storage Tank (City Owned) **UST Monitoring, Inspections / Maintenance, Release Detection Systems, Cathodic Protection Maintenance Records**	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Monitoring and Maintenance records are required on site for 3 years, 6 ½ years for cathodic protection maintenance, 5 years for calibration & maintenance of release detection systems; 23 CCR 2712(b); H&S §25284.4(i)
Ops / Electrical / Support Services / Trans. & Distrib.	OPS-021	Underground Storage Tanks - USTs (City Owned) **Repairs, Lining, Locations, Upgrades**	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	23 CCR 2712(b), H&S §25284.4(i)

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Ops / Electrical / Support Services / Trans. & Distrib.	OPS-022	Wastewater / Sewer System Management Plans (SSMP) and Audits, Sanitary Spills Overflow Prevention Plan (SSOPP) and Sanitary Sewer Overflow Response Plan	Superseded + 5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; SSMPs are required to be updated every 6 years; SSOs are required for a minimum of 5 years; 40 CFR 122.41(j)(2); SWRCB General Order 2006-03; & 2022-0103-DWQ; GC §60201
Ops / Electrical / Support Services / Trans. & Distrib.	OPS-023	Water Quality Monitoring Plan	Superseded + 5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
OPERATIONS / FLEET								
Ops / Fleet	OPS-024	Fleet Management **Database**	Indefinite - Minimum 5 years	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; CCP §§338 et seq., 340 et seq., 342, GC §60201
Ops / Fleet	OPS-025	Air Quality Management District (APCD / AQMD) Permits / Applications (Generators, Construct, Operate, etc.)	Expiration + 5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	40 CFR 70.6; GC §60201
Ops / Fleet	OPS-026	BIT Inspection / Audits (Biennial Inspection of Terminals) / DOT Program / CHP Inspections	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference (CHP audits every 25 months); GC §60201
Ops / Fleet	OPS-027	Generator Operation Logs / Run Time Logs	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference (5 years is required by APCD / AQMD for portable or emergency generators) APCD / AQMD Rule 1470; Form 400–E–13a instructions; GC §60201
Ops / Fleet	OPS-028	Hazardous Waste Manifests	P		Mag, Mfr, OD, Ppr	S / I	Yes - After QC & OD	District preference (District has "cradle to grave" liability); only 3 years is mandated; 40 CFR 262.40, 8 CCR 3204(d)(1)(A), 22 CCR 66262.40; GC §60201

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Ops / Fleet	OPS-029	Pressure Vessel Certifications / Permits (Air Compressors, Propane, etc.)	Expiration of Certificate or Permit		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201 et. seq.
Ops / Fleet	OPS-030	Pre-Trip Inspections / Vehicle Safety Checks / Daily Equipment Checks	90 days		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	13 CCR 1234(e); VC 34505.5(c); 49 CFR 396.11; GC §60201
Ops / Fleet	OPS-031	Tire Disposal / Waste Manifests	3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	14 CCR 18459.3; GC §60201
Ops / Fleet	OPS-032	Used Oil Disposal Manifests	3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	22 CCR 66266.130(c)(5), H&S §25250.18(b), 25250.19(a)(3) et seq.
Ops / Fleet	OPS-033	Vehicle / Heavy Equipment Maintenance History (Backhoes, Cars, Trucks, Vac Trucks, etc.)	Sale or Disposal + 1 year		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	8 CCR § 3203(b)(1); 49 CFR 396.21(b)(1); 49 CFR 396.3(c); CCP §337 et. seq., 13 CCR 1234(f); GC §60201
OPERATIONS / LABORATORY								
Ops / Lab	OPS-033	Lab Reports / Chains of Custody / Tabular Summaries: **Chemical** (Includes Chlorine Residuals, Disinfectant Residuals, Disinfection Byproducts, / Disinfection Byproduct Precursors - TTHMs / HAA5s)	Minimum 10 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Federal law requires 10 years; Actual laboratory reports may be kept, or data may be transferred to tabular summaries ; 40 CFR 141.33(a)
Ops / Lab	OPS-034	Lab Reports / Chains of Custody / Tabular Summaries: **Lead / Copper**	Minimum 12 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Law requires for 12 years or 2 compliance cycles (18 years); Actual laboratory reports may be kept, or data may be transferred to tabular summaries; 22 CCR 64400.25; 22 CCR §64470, 40 CFR 141.33(a); 40 CFR 141.91
Ops / Lab	OPS-035	Lab Reports / Chains of Custody / Tabular Summaries: **Non-Compliance Chemistry / Bacterial**	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Law requires 5 years; Actual laboratory reports may be kept, or data may be transferred to tabular summaries; 40 CFR 141.33(b)

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RECORDS RETENTION SCHEDULE: OPERATIONS
(Operations And Maintenance, Production, Treatment Plants, Water Quality)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
If the record is not listed here, refer to the Retention for District-Wide Standards.								
Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.								
HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
Ops / Lab	OPS-036	Lab Reports / Chains of Custody / Tabular Summaries: **Bacteriological / Organics / Turbidity / Phyto Plankton** / **Wastewater**	Minimum 5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Law requires 5 years; 40 CFR 141.33(a) and (b)(1); 22 CCR §64470
OPERATIONS / TREATMENT PLANTS								
Ops / Lead Div.	OPS-037	SCADA **Database** (Supervisory Control / Data Acquisition)	Indefinite (Perm)	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Data is interrelated; GC §§60201
Ops / Lead Div.	OPS-038	Work Orders / Service Requests / Investigations - **NOT entered in CMMS Database** (/ partial information entered into CMMS Database) (Division providing service retains originals; Division requesting service is considered a copy)	5 years	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; CCP §§338 et seq., 340 et seq., 342, GC §60201
Ops / Lead Div.	OPS-039	Confined Space Entries / Hot Work Permits / Lockout-Blockouts / Lockout-Tagouts / Energy Control Procedures (ECP) / Air Monitoring Calibrations	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Cal/OSHA requests 3 years of documents of Lockout-Blockouts / Lockout-Tagouts during audits; 8 CCR 5157(d)(14) & (e)(6); 29 CFR 1910.146(e)(6); GC §60201
Ops / Treatment Plants	OPS-040	Effluent Flow, DO pH Conductivity	3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Consistent with NPDES Monitoring requirements; GC §60201
Ops / Treatment Plants	OPS-041	FOG Program (Fats, Oil & Grease)	3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; NPDES Monitoring records required for 3 years; POTW reports are required for 3 years; 40 CFR 403.12; GC §60201
Ops / Treatment Plants	OPS-042	Influent Flow & PH	3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Consistent with NPDES Monitoring requirements; GC §60201

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RECORDS RETENTION SCHEDULE: OPERATIONS
(Operations And Maintenance, Production, Treatment Plants, Water Quality)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
If the record is not listed here, refer to the Retention for District-Wide Standards.								
Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.								
HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
Ops / Lead Div.	OPS-043	Operations / Maintenance Manuals / O&M Manuals	Disposal of Equipment		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201
Ops / Treatment Plants	OPS-044	Plant Diaries, Daily Logs, After-Bay Readings, Logs, Monthly Summaries, Monitoring checklists, Filter Surveillance Reports, etc.	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; Meets California District of Health requirements; GC §60201; 17 CCR 7605(f); 22 CCR 64662 (b);
Ops / Treatment Plants	OPS-045	Production Readings - BEFORE SCADA Implementation (Historical)	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; ; GC §§60201
Ops / Treatment Plants	OPS-046	Sanitary Spills and Overflows (SSOs) / Illicit Discharges / Spills / Unauthorized Discharges / Violations	Resolution + 5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Required for a minimum of 5 years; SWRCB Order 2002-0103-DWQ & 2006-03; 40 CFR 122.41(j)(2); GC §60201
Ops / Lead Div.	OPS-047	Standard Operating Procedures / SOPs	Superseded + 5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	District preference; GC §60201

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Information Technology

RECORDS RETENTION SCHEDULE: INFORMATION TECHNOLOGY

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
If the record is not listed here, refer to the Retention for District-Wide Standards.								
Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.								
HOLDS: Litigation, complaints, claims, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).								
INFORMATION TECHNOLOGY								
Information Technology	IT-001	Backups - All Disaster Recovery Computer Backups	When No Longer Required	Yes	Mag.			Used for Disaster Recovery Purposes Only; Considered a copy and can be destroyed when no longer required; GC §60200 et seq.
Information Technology	IT-002	Enterprise System Catalogue (Listing of Enterprise-wide Software, posted on line - SB 272)	When Superseded		Mag.			GC §34090 et seq.
Information Technology	IT-003	Network Configuration Maps / Plans	When No Longer Required	Yes	Mag.			Preliminary documents not retained in the ordinary course of business; GC §60201 et seq.
Information Technology	IT-004	Recordings - **Video Recordings - Regular and Ongoing operations / Building Security**	1 year		Mag			GC §§60201, 53160
Information Technology	IT-005	Recordings - **Video Recordings - Public Areas / Public Activity** (Does not record regular and ongoing operations)	When No Longer Required		Mag			Does not record regular and ongoing operations; GC §§60201, 53160
Information Technology	IT-006	Software Licenses, Warrantees, Installation Media	When No Longer Required		Mag.			Department preference; GC §60201 et seq.
Information Technology	IT-007	**UNALTERABLE MEDIA / IMMUTABLE MEDIA (Cloud Immutable Backup)**, WORM / DVD-r / CD-r / Blue Ray-R) / other unalterable media that does not permit additions, deletions, / changes	Follows Retention of Official Electronic Record		OD			For legal compliance for Trustworthy Electronic Records (when the electronic record serves as the official record); must be stored in a "safe and separate location"; GC 60201, 12168.7, EVC 1550, 2 CCR 22620 et seq.

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Agenda Item No. 6

STAFF REPORT

To: **Board of Directors** **Meeting Date: October 22, 2026**

From: **Dennis Cafferty, General Manager**

Subject: **ACWA Amended and Restated Bylaws**
ETWD Voter Designation

ACWA will conduct a vote of the membership by electronic ballot on proposed Amended and Restated Bylaws, as recommended by the ACWA Board of Directors on September 25, 2026.

The voting will be conducted by electronic ballot consistent with the voting process used by members to elect Board Officers and region boards. Conducting the vote electronically provides all members an opportunity to participate, rather than limiting voting to members attending an ACWA conference, thereby promoting broader member participation and engagement.

Each member agency is entitled to one vote that will be cast by its authorized voting representative. Member agencies must designate their voting representative by submitting the ACWA Voting Representative Form by Friday, October 30. ACWA will also use this designee as the voting representative in next year's election for ACWA's Board Officers and region boards for the 2028-'29 term. Members will have the opportunity to change the designation prior to the deadline for nominating candidates if desired.

The designated voter will receive an email directly from Simply Voting on November 9. Ballots must be submitted by December 18.

The Voter Designation & Information Form is attached for reference.

Staff intend to agendize the ACWA Bylaws at the November Board Meeting, following receipt of the actual ballot, to provide the Board the opportunity to provide direction to the District voting representative regarding the actual vote.

Recommended Action: Staff recommend that the Board of Directors designate General Manager Dennis Cafferty for the purpose of casting a vote regarding the Amended and Restated Bylaws of the Association of California Water Agencies. Staff further recommend the Board direct the General Manager to complete and submit the ACWA Authorized Voting Representative Form identifying the Board approved Voting Representative.

ACWA
Association of California Water Agencies

2026 PROPOSED BYLAWS AMENDMENTS

AUTHORIZED VOTING REPRESENTATIVE FORM

ACWA members will vote by electronic ballot on proposed Amended and Restated Bylaws.

Key Details:

- **Electronic Voting:** Voting will be conducted electronically by each member agency's designated voter.
- **Designated Voter:** Each agency must **designate one voting representative by October 30.** To designate your agency's voter, please submit this **Authorized Voting Representative Form** by the deadline.
  Note: ACWA will also use the person designated below as the voting representative in next year's election for ACWA's Board Officers and region boards for the 2028–'29 term. You will have an opportunity to change the designation prior to the deadline for nominating candidates, if desired.
- **Default Voter:** If no representative is designated by the deadline, your agency's **General Manager** will be the authorized voter by default.
- **Ballot Distribution:** Authorized voters will receive an electronic ballot on November 9.

For more information about ACWA's elections, visit: **www.acwa.com/elections**.

The person designated below will cast our agency's vote for the proposed Amended and Restated Bylaws process in 2026 and the election of ACWA's President, Vice President and Region Board for the 2028–'29 term.		
Member Agency's Name		Agency's Phone No.
Authorized Voting Representative's **Name**	Authorized Voting Representative's **Email**	Authorized Voting Representative's **Phone No.**

Print Name of Member Agency's Authorized Signatory

X

Authorized Signatory Signature

Date

SUBMIT YOUR FORM

To: Donna Pangborn, Senior Clerk of the Board
Email: donnap@acwa.com
Mail: 980 9th Street, Suite 1000, Sacramento, CA 95814

SUBMISSION DEADLINE

OCT. 30, 2026

Agenda Item No. 7

STAFF REPORT

To:	**Board of Directors**	**Meeting Date:**	**October 22, 2026**
From:	**Dennis Cafferty, General Manager** **Hannah Ford, Director of Engineering**		
Subject:	**Recycled Water Project Opportunities**		

Staff have performed an update of the analysis of recycled water project opportunities considering both expansions of the existing recycled water system and potential direct potable reuse options. Staff will deliver a presentation at the Board meeting. The presentation material will be provided under separate cover prior to the Board meeting.

GENERAL MANAGER'S REPORT

October 2026

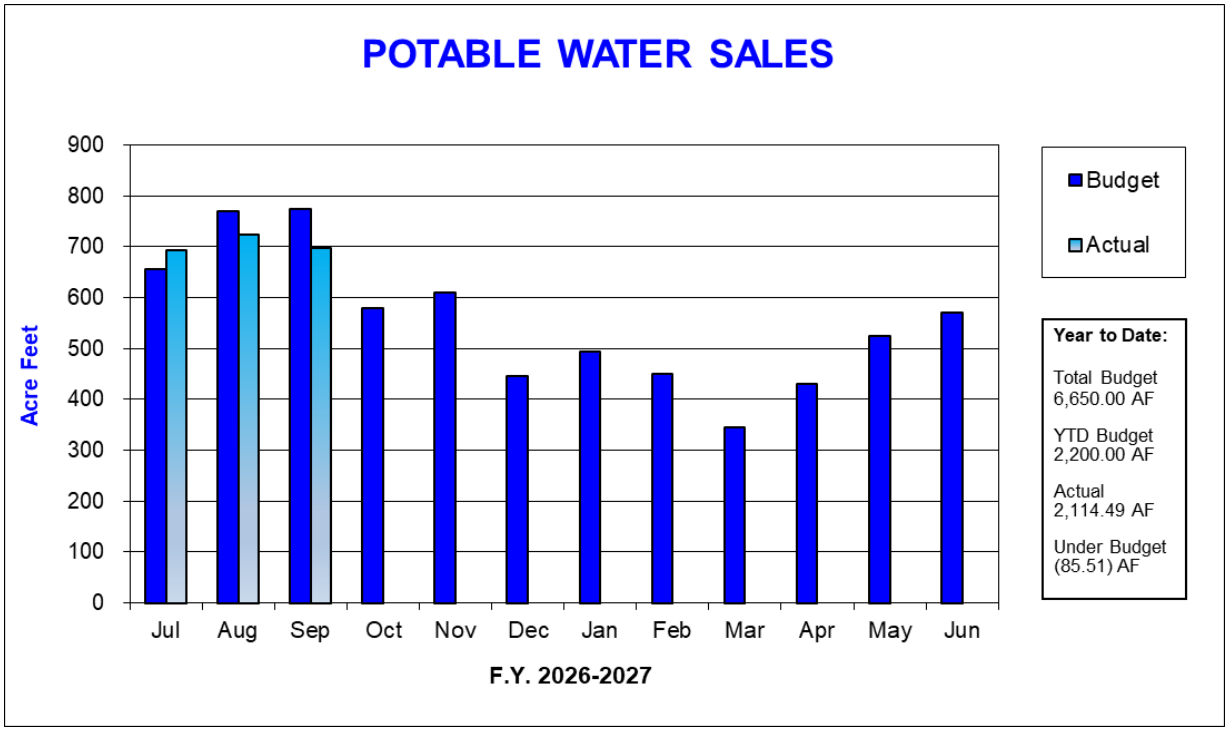
I. OFFICE OF THE GENERAL MANAGER

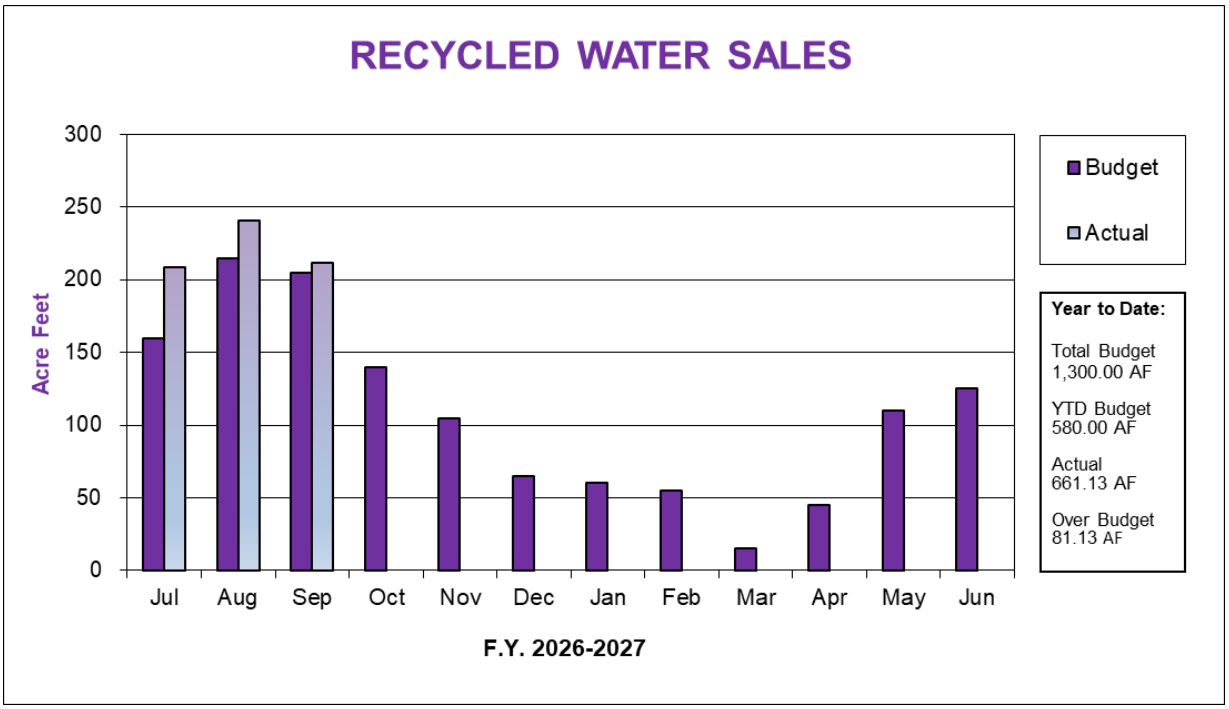
- MWDOC P&O Committee Meeting
- MWDOC MET Directors Workshop
- MWDOC Board Meeting
- MWDOC Managers Meeting
- SOCWA Finance Committee Meeting
- South Orange County Agencies Group Meeting
- Orange County Water Summit
- Regional El Niño Coordination Meeting
- Meeting with PFM
- ETWD President / Vice President / General Manager Meeting
- Meeting with Gladwell Governmental Services
- Lake Forest Civic Academy
- Elevate Leadership Academy Opening Remarks
- ETWD SOCWA Planning Committee Meeting
- ETWD Agenda Review Meeting
- ETWD Regular Engineering & Finance Committee Meetings
- ETWD Regular Board Meeting

II. DOMESTIC AND RECYCLED WATER SALES

Actual domestic sales for the year-to-date as of September 30, 2026, are 2,114.49 acre-feet. This compares to year-to-date budgeted domestic sales of 2,200.00 acre-feet. The year-to-date variation in actual to budgeted sales reflects a decrease of 85.51 acre-feet. Actual sales are 66.34 acre-feet higher than last year-to-date actual sales for the same period.

Actual recycled sales for the year-to-date as of September 30, 2026, are 661.13 acre-feet. This compares to year-to-date budgeted recycled sales of 580.00 acre-feet. The year-to-date variation in actual to budgeted sales reflects an increase of 81.13 acre-feet. Actual sales are 12.60 acre-feet higher than last year-to-date actual sales for the same period.

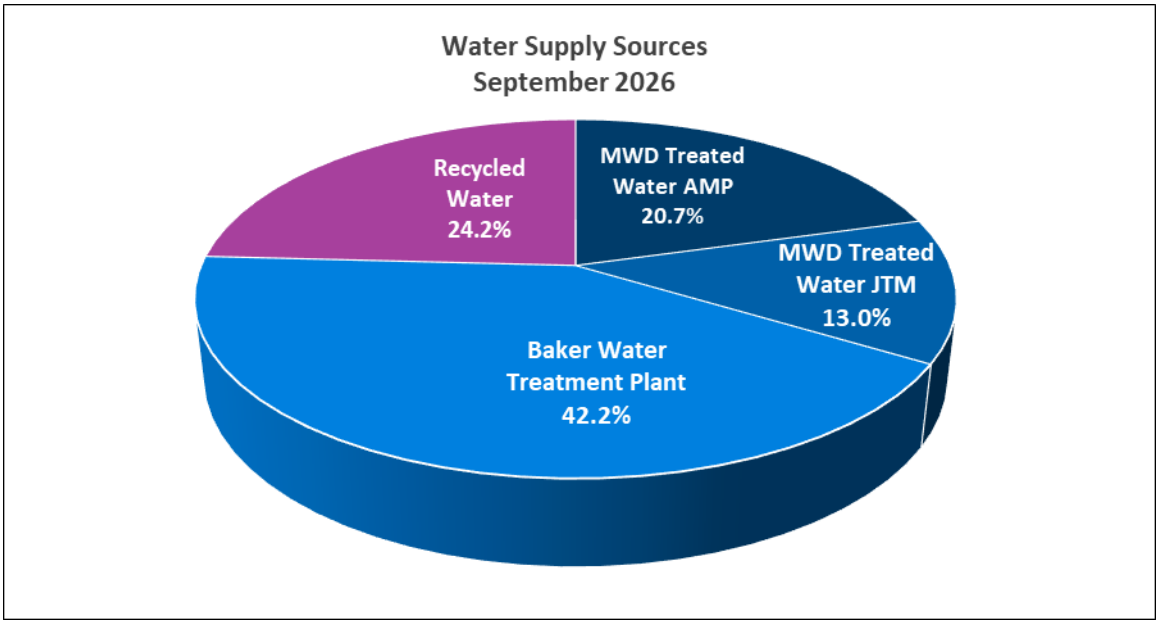


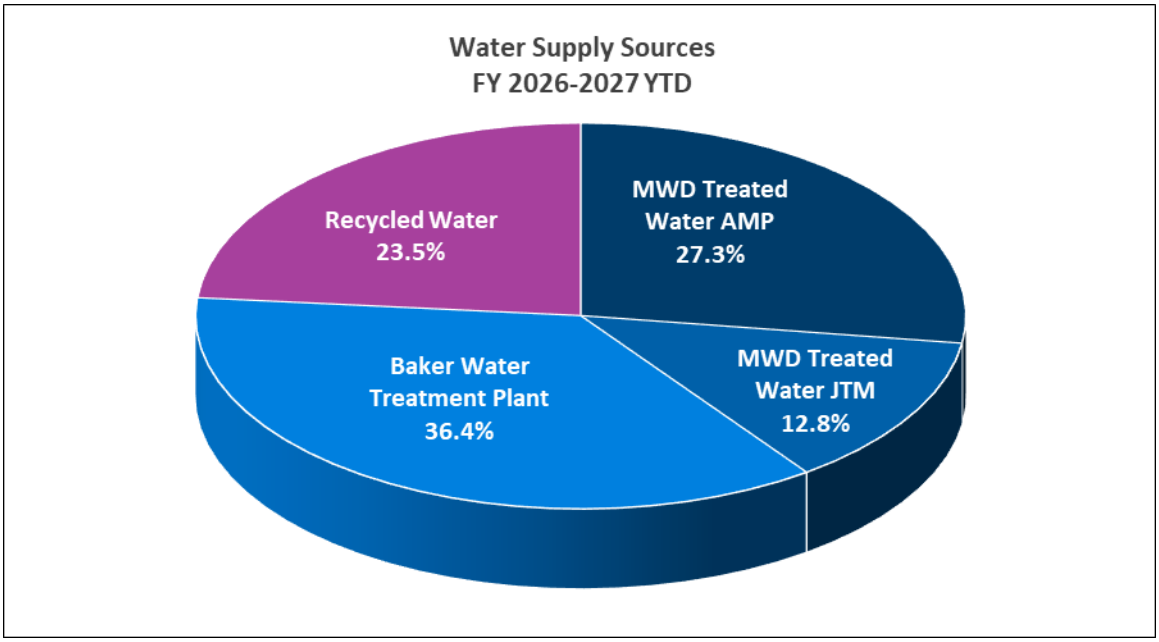


III. WATER SUPPLY SOURCES

The charts below provide a summary of water supply sources for the month and fiscal year to date (FY 2026-2027). They illustrate the relative contribution of each supply source, including imported treated water from Metropolitan Water District (MWD) via the AMP and JTM connections, local production from the Baker Water Treatment Plant, interconnections with neighboring agencies, and recycled water. These charts help track supply trends and support planning and operational decisions.

Water Supply Sources (AF)				
	September 2026		FY 2026-2027 YTD	
MWD Treated Water AMP	180.9	20.7%	767.0	27.3%
MWD Treated Water JTM	113.4	13.0%	358.5	12.8%
Interconnections	-	0.0%	-	0.0%
Baker Water Treatment Plant	369.7	42.2%	1,024.3	36.4%
Recycled Water	211.4	24.2%	661.1	23.5%
TOTAL	**875.4**	**100.0%**	**2,810.9**	**100.0%**





Field Customer Service Activity Report

Regular Service Calls	SEPT 2026	SEPT 2025
Serviceman Dispatched to Read, Connect / Disconnect Service	69	50
Field Investigations:		
Check for leaks - calls to CS Office: (Irrigation, Meter, Street leaks)		
Customer Responsible	16	26
District Responsible	3	2
None found/other	12	23
Total - Check for Leaks	**31**	**51**
High Reads Checked - High Consumption (Billing Dept.)		
Customer Leaks	13	24
No Leaks	9	13
Total High Reads Checked	**22**	**37**
Check Stopped Slowed Meters-Low Consumption (Billing)	17	5
Re-Check Read	4	5
Water Quality: Taste / Odor / Color		
Phone response	1	2
Field response	0	4
Total Water Quality	**1**	**6**
Meter Boxes		
Meter Box Replaced	1	1
Meter Box Lids Replaced	9	4
Meter Box Covers Replaced	15	8
Meter Box Clean, Digout	3	5
Raised Meter Box	0	0
Total Meter Boxes	**28**	**18**
OMCOP: Old Meter Change - Out Program	2	1
Fogged Registers	9	9
Trim Bushes / Meter Obstruction	1	7
CSSOV (Angle Meter/Ball Valve/Gate Valve/Globe Valve)		
Check/Repaired/Replaced	12	7
Removed Meter	0	1
New Meter	1	0
Unread Meters	2	0
Construction (Hydrant) Meters issued	0	0
Sewer - Odor / Stoppage / Manhole Covers	0	0
Ordinance Infraction	0	0
Recycled Water	0	1
General Maintenance Response	1	9
Fire Hydrants: Hit / Leaks / Caps	1	0
Pressure (psi) Checks / Reads	2	7
Bees Removed	1	2
Backflow / Cross Connection	0	0
Other: (Uncommon Non-Maintenance Calls)	2	9
On-Call After Hrs. CS Response	11	26
Total Field Investigations	**217**	**251**

Office Customer Service Activity Report

Telephone Calls	SEPT 2026	SEPT 2025
Change of Service: Connections and Disconnections	76	63
Ordinance Infraction / Water Waste Complaints	0	1
Water Quality Taste - Odor - Color	2	2
Leaks / Breaks	19	14
Sewer Problems (Odor / Spills)	2	3
ETWD Facilities Inquiries		
Meter Boxes / Covers / Lids / Hydrants / Pump Stations /Graffiti / "Gen. Maint"	1	0
Backflow / Cross Connection (Questions or Yearly Testing Forms)	0	0
Maintenance Service Order Requests (Bees, Pressure, Fogged-Dirty Registers)	9	20
Miscellaneous (Other: Employment, Deliveries, Sales calls)	15	29
Outside Utility Districts	39	49
Phone calls Transfer to other Departments within ETWD	49	39
Phone calls for the Board of Directors	0	0
Recycled Water	0	1
Construction Meter calls (Hydrant)	2	0
Security System Calls (Alarms at ETWD facilities)	0	2
Cellular Site Calls (Access to Tower Sites)	0	0
Pager Calls Specifically for Pump Stations - SCADA	0	0
Email Correspondence:	60	23
Billing Calls		
Billing / Payments & Graph Inquires	206	189
Assistance with online payments and ETWD's portal (cc, e-checks, other.)	1	21
Payment Extensions	24	49
Delinquent Payment Calls to Customer 's Prior to Shutoff (Automatic Dialer)	0	0
Return Calls from customers left on our voice mail system. Ext 500	3	2
Variance / Adjustment Inquiries	14	9
Variance / Adjustment Requests Processed	11	8
Total Billing Calls	**259**	**278**
Complaints		
Payment Processing Fee Complaints	0	0
Customers Complaints non bill related.	0	0
Billing Disputes	0	0
Total Complaints	**0**	**0**
Total Field Investigations	**533**	**524**
Service Disconnection & Billing Delinquencies		
10-Day Shut-off Notices Mailed	246	252
7-Day Shut-off Door Hangers Hung	103	96
24-Hour Shut-off Door Hangers Hung	4	0
Shut-offs / Disconnect for Non-Payment (DNP)	15	13
Outstanding Balances > 60 Days (Accounts)	359	343
Outstanding Balances > 60 Days ($)	$95,487.73	$88,847.74
Uncollectible Accounts		
Budget YTD	$5,000.00	$4,875.00
Actual YTD	$0.00	$0.00
Credit Card Payments		
Number of Payments	2,213	1,924
Total Amount of Payments	$483,608.65	$394,778.81

The Metropolitan Water District of Southern California's

Water Supply Conditions Report

https://www.mwdh2o.com/WSCR

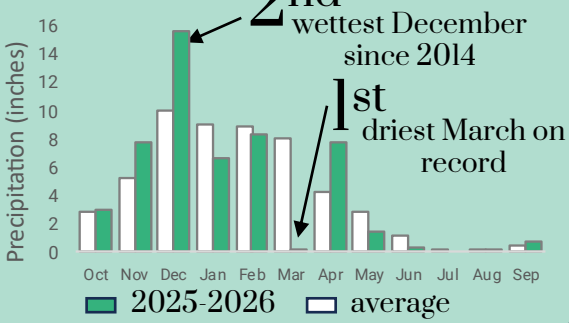
State Water Project Water Year 2025-2026

2nd

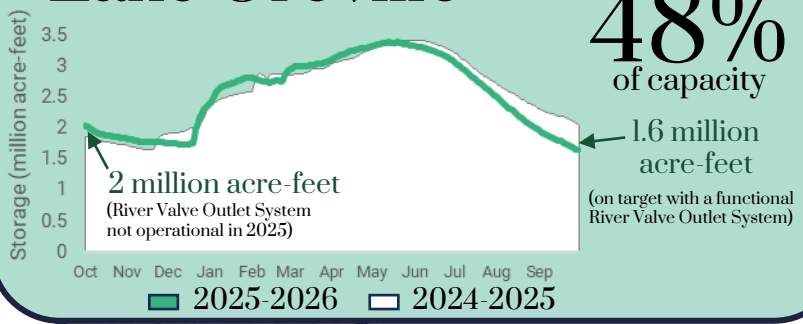
driest snowpack in history for northern Sierra behind record dry water year 2014-2015

Rain in the Northern Sierra 8-Station Area

97% of normal



Lake Oroville



48% of capacity

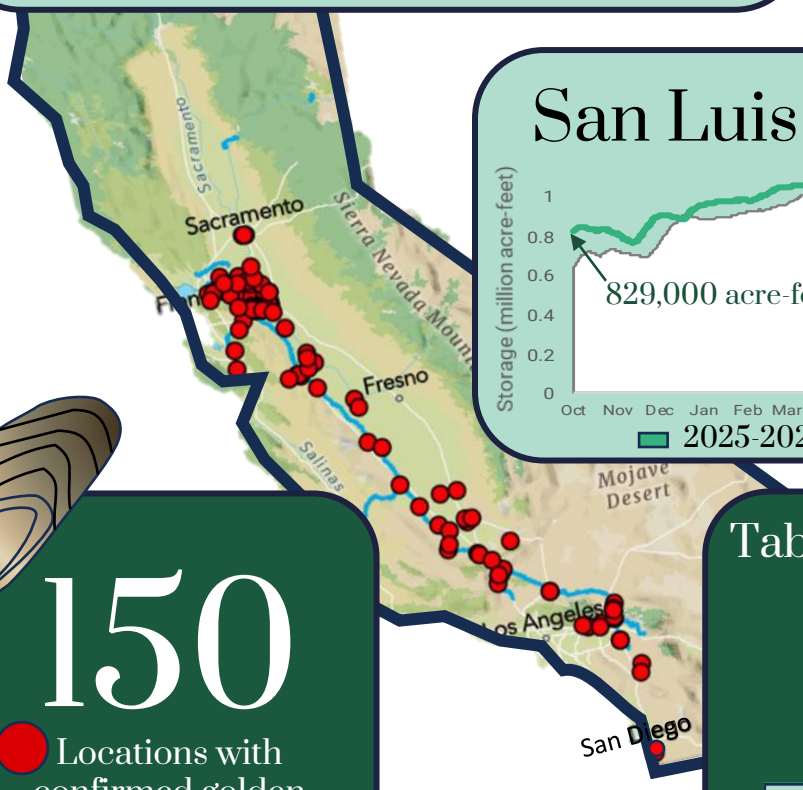
1.6 million acre-feet

(on target with a functional River Valve Outlet System)

1st

Warmest winter (Dec-Feb) in California in 131 years

Warmest March with 12.5° F above average



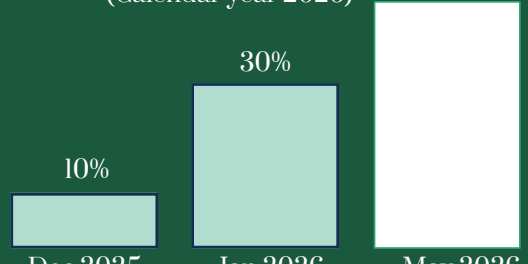
San Luis Reservoir

92% of capacity

150

Locations with confirmed golden mussel presence

Table A Allocation (Calendar year 2026)



Questions? https://forms.cloud.microsoft/g/Gj3aReAuCm

The Metropolitan Water District of Southern California's

Water Supply Conditions Report

https://www.mwdh2o.com/WSCR

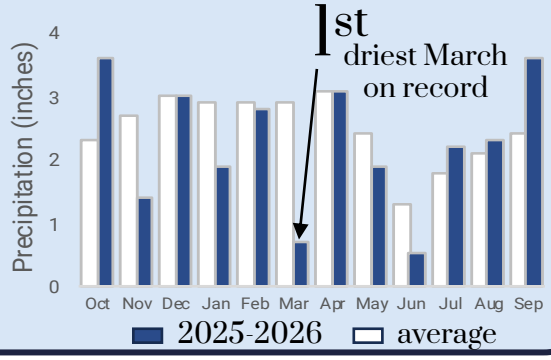
Colorado River Resources
Water Year 2025-2026

1st

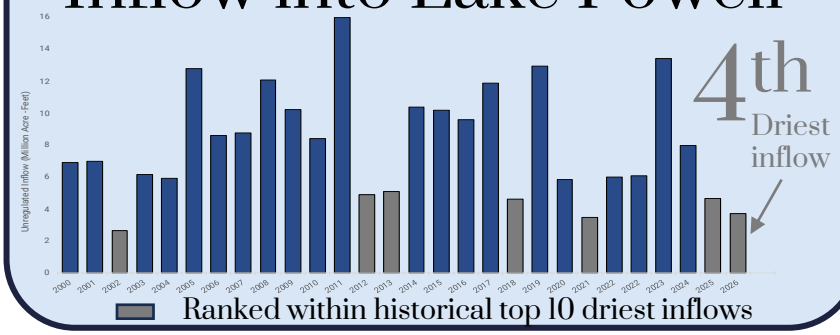
driest snowpack in history for Upper Colorado River Basin

Rain in the Upper Colorado River Basin

91% of normal



Inflow into Lake Powell



1st

Warmest winter (Dec-Feb) in Upper Colorado River Basin in 131 years

Lake Powell

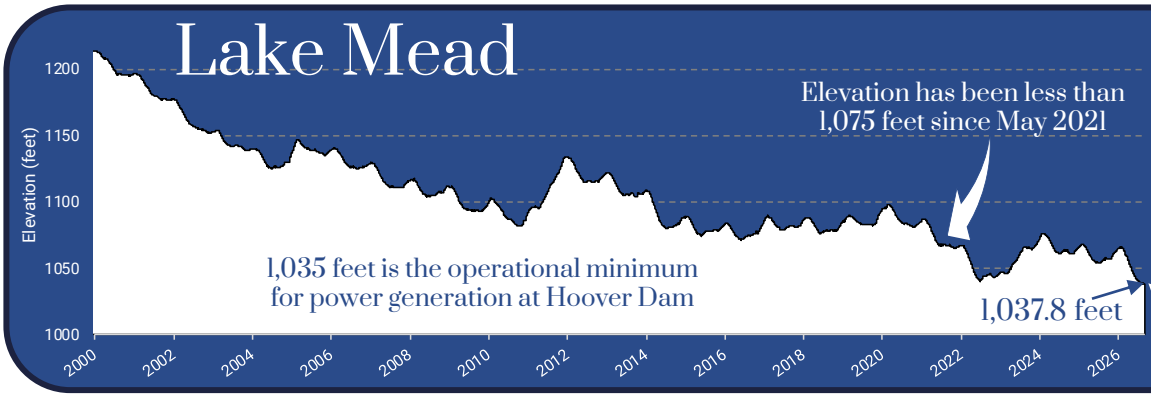
22% of capacity



Lowest level since June 1967

Lake Mead

26% of capacity



Lowest level since April 1937

Questions? https://forms.cloud.microsoft/g/Gj3aReAuCm

WILL SERVE SUMMARY REPORT
October 2026

PROJECT NAME	PROJECT DESCRIPTION	Will Serve Letter Date	PHASE	CFF
Heritage Market	Converting retail to market with kitchen	6/1/2026	Construction	Not Yet Calculated
Asia Spa	Coverting retail to beauty parlor	1/14/2026	Construction	$ 1,912
Muirlands and Los Alisos Intersection Improvements	Relocation of water appurtenances and at-grade adjustments	3/19/2026	Plan Check	$ -
The Village at Laguna Hills (Firestone Tire Demolition)	Removal of existing water, fire, and sewer services at former Firestone Tire site.	N/A	Construction	$ -
The Village at Laguna Hills (Sears Auto Demolition)	Removal of existing water, fire and sewer services at former Sears Auto site.	N/A	Plan Check	$ -
The Village at Laguna Hills (Phase 1A - Retail)	Installation of water, fire, and sewer services to support new retail development in Q4 2026 - Q4 2028.	Forthcoming	Plan Check	Not Yet Calculated
The Village at Laguna Hills (Phase 1A - Affordable Housing)	Installation of water, fire, and sewer services to support 200 new dwelling units in Q4 2026 - Q4 2028.	Forthcoming	Planning	Not Yet Calculated
The Village at Laguna Hills (Phase 1A - Hotel East)	Installation of water, fire, and sewer services to support new hotel in Q4 2026 - Q4 2028.	Forthcoming	Planning	Not Yet Calculated
The Village at Laguna Hills (Phase 1B - Village Park, Hotel West, Multifamily North)	Installation of water, fire, and sewer services to support new park, retail, hotel, and multifamily homes in Q2 2028 - Q2 2030.	Forthcoming	Planning	Not Yet Calculated
The Village at Laguna Hills (North Residential)	Installation of water, fire, and sewer services to support new townhomes and multifamily homes North of Health Center Drive starting in 2027.	Forthcoming	Planning	Not Yet Calculated
The Village at Laguna Hills (South Residential)	Installation of water, fire, and sewer services to support new townhomes and multifamily homes South of Health Center Drive starting in 2028/2029.	Forthcoming	Planning	Not Yet Calculated
Parentis Health Sewermain Relocation	Relocating an existing sewermain.	6/26/2025	Plan Check	Not Yet Calculated
Central Utilities Plant 24451 Health Center Drive	Additional domestic and fire services for a medical central utility plant.	12/20/2024	Construction	$ 21,856
23272 & 23282 Mill Creek Terravita - Phase 1	Residential development for 43 dwelling units	Forthcoming	Plan Check	Not Yet Calculated
23161 Mill Creek Koshbin	Residential development for 36 attached condo units	6/30/2026	Construction	$ 217,722
23172 Plaza Pointe Dr and 23441 S Pointe Laguna Hills	Residential development of 100 dwelling units	Forthcoming	Planning	Not Yet Calculated
Texas Roadhouse BBQ	Conversion of El Torito into Texas Roadhouse BBQ	4/23/2026	Construction	$ -
23370 Moulton Pkwy Sewer Improvements	Modifications to the sewer lateral	5/8/2025	Construction	$ -
23501 Avenida De La Carlota Bollmart	Converting retail to market with grocery store	11/26/2025	Construction	$ 12,706
Laguna Woods City Center Project	Improvement of an existing city park	Forthcoming	Plan Check	$ -
Laguna Woods Fire Station	Addition of a fire station adjacent to the Pump Station 1 Site	Forthcoming	Planning	Not Yet Calculated

WILL SERVE SUMMARY REPORT
October 2026

PROJECT NAME	PROJECT DESCRIPTION	Will Serve Letter Date	PHASE	CFF
Quick Quack Carwash	Conversion of a restaurant into a carwash	Forthcoming	Plan Check	Not Yet Calculated
24301 Paseo De Valencia	Conversion of a bank to medical offices	2/18/2026	Plan Check	Not Yet Calculated
IVX Health	Conversion of retail to a medical office	6/23/2026	Plan Check	$ 3,790
The Artist Tree	Conversion of a pharmacy to a multi tenant unit with cannabis retail	N/A	Close-Out	$ -
23022 La Cadena	Conversion of commercial to 29 townhomes	Forthcoming	Planning	Not Yet Calculated
Mill Creek Terravita - Phase 2	Residential development for 415 dwelling units	Forthcoming	Plan Check	Not Yet Calculated
Meeso Tofu House	Conversion of retail to a restaurant	Forthcoming	Plan Check	$ 39,182
VI Pro - Neurology Office	Conversion of office space to medical office	Forthcoming	Plan Check	$ 1,234

EL TORO WATER DISTRICT – LEGISLATIVE MATRIX

California State Legislative & Water Policy Priorities - Updated October 14, 2026

Bill / Item	Author	Title	Brief Summary	ETWD Position	Status
CA SB 1153	Sen. Caballero (D–Merced)	**Disaster preparedness: urban retail water suppliers and public water systems: wildfire**	Beginning January 1, 2028, requires urban retail water suppliers serving 3,300 or more persons in high or very high fire hazard severity zones to add wildfire-specific response procedures and mitigation actions to disaster preparedness plans. The bill also states that public water systems have no duty to design, construct, or maintain systems for wildfire defense or suppression and provides liability-related protections tied to wildfire water supply/pressure.	**Signed ACWA Sponsored Coalition Letter**	Signed / Chaptered. Approved September 29, 2026; Chapter 776, Statutes of 2026. Wildfire-specific disaster preparedness requirements begin January 1, 2028.
CA AB 2180	Asm. Ward (D–San Diego)	**Local government: Proposition 218 Omnibus Implementation Act: proportional cost of service**	Clarifies how local agencies may demonstrate proportionality for property-related water and sewer fees. Allows reasonable cost-allocation methods, including uniform or tiered customer classes, without requiring exact parcel-by-parcel measurement; tier costs may be supported by any reasonable allocation basis.	**Signed ACWA Sponsored Coalition Letter**	Signed / Chaptered. Approved September 27, 2026; Chapter 587, Statutes of 2026.
CA AB 2739	Asm. Soria (D–Fresno)	**Water: affordability and system stabilization**	Creates the Water Affordability and System Stabilization Trust/Fund. Under the current bill, annual trust income is generally allocated 45% to water rate assistance, 45% to a DWR community water affordability/infrastructure grant program, and 10% reinvested to build a perpetual funding source.	**Signed IRWD Sponsored Coalition Letter**	Vetoed. Governor vetoed AB 2739 on September 30, 2026; did not become law.
Sites Reservoir Coalition	Sites Project Authority / MWDSC coalition partners	**Sites Reservoir Project – statewide off-stream water storage**	Coalition advocacy supporting development of the proposed off-stream Sites Reservoir in the Sacramento Valley to improve dry-year water supply reliability, operational flexibility, and ecosystem/public benefits. Key 2026 work includes water-right permitting, participant agreements, financing, and preconstruction activities.	**Signed MWDSC Coalition Letter**	Project development / permitting. State water-right proceedings are advanced: a Draft Decision and Draft Permit were issued 03/20/2026, comments closed 05/22/2026, and State Water Board final action was scheduled for September 2026. The California Water Commission also approved $268.9 million in supplemental funding in June 2026.

EL TORO WATER DISTRICT – LEGISLATIVE MATRIX

California State Legislative & Water Policy Priorities - Updated October 14, 2026

Bill / Item	Author	Title	Brief Summary	ETWD Position	Status
Delta Conveyance Project Streamlining Trailer Bill	Governor Gavin Newsom / Department of Finance	**Delta Conveyance Project: Streamling Proposal**	Governor Newsom's May 2025 budget revision proposed statutory changes to accelerate the Delta Conveyance Project by simplifying certain permitting and protest procedures, confirming DWR authority to finance the project with State Water Project revenue bonds repaid by participating water agencies, streamlining judicial review, and facilitating property acquisition and utility work. ETWD supported the streamlining proposal.	**Signed Governor Newsom Coalition Letter**	2025 proposal was not introduced for a legislative vote before the end of the 2025 session. No 2026 successor trailer bill was identified in the sources reviewed as of 08/20/2026. The Delta Conveyance Project itself continues to advance under existing processes: federal Endangered Species Act biological opinions were completed in June 2026, and DWR filed a revised Delta Plan consistency certification on 07/24/2026 following the Delta Stewardship Council's April 2026 decision.
CA AB 259	Asm. Rubio (D–Baldwin Park)	**Open meetings: local agencies: teleconferences**	Would continue the modified Brown Act alternative teleconference procedures originally created by AB 2449, allowing qualifying remote participation under specified public-access, notice, quorum, and procedural requirements instead of allowing the provisions to sunset.	**Support**	Inactive / Did not advance in 2026. Last confirmed committee action: Senate hearing postponed June 27, 2025; no enacted law identified.
CA SB 496	Sen. Hurtado (D–Bakersfield)	**Advanced Clean Fleets Regulation: appeals advisory committee: exemptions**	Would have required the California Air Resources Board to establish an Advanced Clean Fleets Appeals Advisory Committee to review denied exemption requests and provide recommendations, with specified stakeholder representation.	**Support**	Dead / Inactive. Held in Senate Appropriations on 05/23/2025 and returned to the Secretary of the Senate on 02/02/2026 pursuant to Joint Rule 56. No further action as of 09/17/2026.
CA SB 350	Sen. Durazo (D–Los Angeles)	**Water Rate Assistance Program**	Would have established a statewide Water Rate Assistance Program and fund for low-income residential water and wastewater customers, administered by the State Water Resources Control Board and contingent on legislative appropriation. The concept was reintroduced in 2026 as SB 1125.	**Support**	Dead / Inactive. Returned to the Secretary of the Senate on 02/02/2026 pursuant to Joint Rule 56. No further action as of 09/17/2026.
CA SB 454	Sen. McNerney (D–Pleasanton)	**State Water Resources Control Board: PFAS Mitigation Program**	Would have established a PFAS Mitigation Program and fund at the State Water Resources Control Board to provide financial and technical assistance for PFAS remediation and treatment, subject to appropriation, and to accept eligible state, federal, private, and other nonstate funding.	**Support**	Vetoed / Inactive. Governor vetoed the bill on 10/01/2025; veto was sustained and the bill was stricken from file on 03/02/2026.

EL TORO WATER DISTRICT – LEGISLATIVE MATRIX

California State Legislative & Water Policy Priorities - Updated October 14, 2026

Bill / Item	Author	Title	Brief Summary	ETWD Position	Status
CA AB 514	Asm. Cottie Petrie-Norris (D–Irvine)	**Water: emergency water supplies**	Declares state policy to encourage, but not mandate, local and regional water suppliers to develop emergency water supplies for use during droughts or unplanned service or supply disruptions. Emergency supplies must be water to which the supplier has an established legal right and that are identified in a water shortage contingency plan or drought plan. The bill does not require suppliers to modify operations, demand-management programs, water rights, contracts, or shortage plans.	**Support**	Dead / Inactive. Held in the Assembly Appropriations Committee in 2025 and did not advance before the legislative deadline; no further action as of 09/17/2026.

To: Board of Directors, *Municipal Water District of Orange County*
From: Natural Resource Results
RE: Monthly Board Report – October 2026

Colorado River Update

California continues to meet with the Department of the Interior, Arizona, and Nevada to discuss the status of the Lower Basin agreement. With Reclamation already beginning its 2027 water order process, pressure is mounting to finalize an agreement implementing the 2027–2028 Operating Guidelines, including the agreed-upon water-use reductions. California continues to raise concerns about Nevada's recent lawsuit and how it will impact the Lower Basin plan.

Reclamation's September 2026 Most Probable 24-Month Study projects a 6 million acre-foot release from Lake Powell in the 2027 operating year, indicating a significant shift in water storage from Lake Mead to Lake Powell. Powell is projected to rise to about 3,542 feet, while Mead could fall to 998 feet by August 2028. The strategy is intended to protect Glen Canyon Dam and Lake Powell infrastructure by reducing releases from Powell and drawing additional water from Flaming Gorge. The trade-off is increased pressure on Lake Mead and Hoover Dam, including reduced hydropower efficiency and potentially significant reductions in generating capacity as Mead approaches 1,035 feet.

Lower Mead elevations would also increase the likelihood of more severe Lower Basin shortage tiers in 2028 and beyond, making the upcoming Upper Basin snowpack a key factor in determining future reservoir conditions and water deliveries.

FY2027 Appropriations – Continuing Resolution Enacted

Congress averted an October 1st shutdown by enacting a continuing resolution that funds the federal government at largely FY2026 levels through December 11, 2026. The CR also temporarily blocks the Office of Management and Budget's proposed rule that would subject federal grant awards to review by political appointees.

Full-year FY2027 Energy and Water and Interior-Environment bills remain unfinished; the House has completed committee action on all twelve bills but passed only three on the floor, none of which fund Reclamation. Final decisions on Reclamation's Water and Related Resources account, WaterSMART, Title XVI water recycling, and the WIIN Act storage account are now expected in a lame-duck omnibus or a further CR in December. Given the scale of the Colorado River shortage, we anticipate pressure from Lower Basin delegations for emergency drought funding as part of any year-end package.

Water Resources Development Act of 2026 Passes the House

On September 16, the House passed the Water Resources Development Act of 2026 (H.R. 9497) by a vote of 415–9. The bill authorizes approximately $7 billion in U.S. Army Corps of Engineers projects along with dozens of new feasibility studies. The Senate version (S. 4949), reported unanimously by the Environment and Public Works Committee in July, awaits floor consideration. The chambers will need to reconcile the two versions, most likely in the lame-duck session; given the biennial WRDA cycle's track record, enactment by year-end is a reasonable expectation.

Sites Reservoir

On September 3, the State Water Resources Control Board released a revised draft water right decision and draft permit for the proposed 1.5 million acre-foot Sites Reservoir, following the March 2026 drafts issued by the Board's Administrative Hearings Office. The revised drafts would authorize diversions of up to 986,000 acre-feet per year from the Sacramento River, expand opportunities to divert during high flows, align permit conditions with the compliance pathways in the final draft Bay-Delta Plan (including the Healthy Rivers and Landscapes voluntary agreement program), and allow project proponents to demonstrate availability of water from local creeks. In mid-September the Board also issued the project's Clean Water Act Section 401 water quality certification.

Final written comments are due October 5, and the Board is scheduled to consider adoption at its November 4 meeting. The revisions are generally favorable to project participants, relative to the March drafts, which had drawn concern from the Sites Project Authority over diversion limitations. Adoption in November would clear the most significant remaining state regulatory hurdle for the project.

Supplemental WOTUS Proposal

On September 9, EPA and the Army Corps of Engineers issued a supplemental notice of proposed rulemaking on the definition of "waters of the United States." After reviewing approximately 220,000 comments on the November 2025 proposed rule, the agencies are seeking comment on additional options for defining "relatively permanent" waters and wetlands with a "continuous surface connection"—the two key tests established by the Supreme Court in Sackett v. EPA. Among the options under consideration is limiting jurisdiction to perennial waters and eliminating the "wet season" concept from the original proposal. Comments are due October 9.

Bureau of Reclamation Personnel

On September 25th, Reclamation announced that Anja Raudabaugh has been appointed as Deputy Commissioner for Policy. Ms. Raudabaugh comes from Western United Dairies and has also worked for the Madera County Farm Bureau and former Congressman Doug Ose (R-CA).

West Coast Advisors
Strategic Public Affairs

September 30, 2026

To: Municipal Water District of Orange County

From: Michael Boccadoro
Beth Olhasso

RE: September Report

California is closing out the 2025–26 water year with generally solid water supplies, although reservoirs have been drawn down through the summer with the water year ending on September 30. Statewide reservoir storage is about 102 percent of the historical average for this time of year. Key reservoirs remain in relatively strong condition: Shasta is about 56 percent full and 96 percent of its historical average, Oroville is about 54 percent full and 92 percent of average, and San Luis is about 66 percent full and 168 percent of average. Overall, the state enters the final days of the water year with substantial carryover storage, but conditions going into the new water year will depend heavily on the coming winter's precipitation and snowpack.

The State Water Resources Control Board is moving toward an October 28–29 decision on the Bay-Delta Water Quality Control Plan update, but the proposal faces opposition from the federal government and Westlands Water District. Metropolitan Water District submitted comments on new water-supply projects, base flows and interior Delta flow objectives, while 13 MWD member agencies expressed support for the Healthy Rivers and Landscapes approach.

Sites Reservoir moved closer to construction in September with the State Water Resources Control Board's revised draft water-right decision and final water-quality certification. The proposed 1.5-million-acre-foot reservoir could divert up to 986,000 acre-feet annually, with the final water-right permit scheduled for a November 4 vote.

California's response to the spread of golden mussels is shifting toward active treatment of infested facilities. Semitropic Water Storage District declared an emergency and authorized copper treatment after detecting the invasive species, while state agencies expand monitoring and treatment efforts that could have significant implications for interconnected water systems.

California is preparing for a potentially very wet winter as a strong El Niño develops in the Pacific. Governor Newsom proclaimed a statewide emergency to accelerate preparations for flooding and other storm impacts, while water managers face the challenge of balancing flood protection with capturing winter supplies.

The California Water Commission highlighted groundwater recharge as an increasingly important component of the state's water-supply strategy. Presentations showed how Central Valley, Central Coast and Southern California agencies are using recharge basins, agricultural land, recycled water and advanced water purification to store water underground for future use.

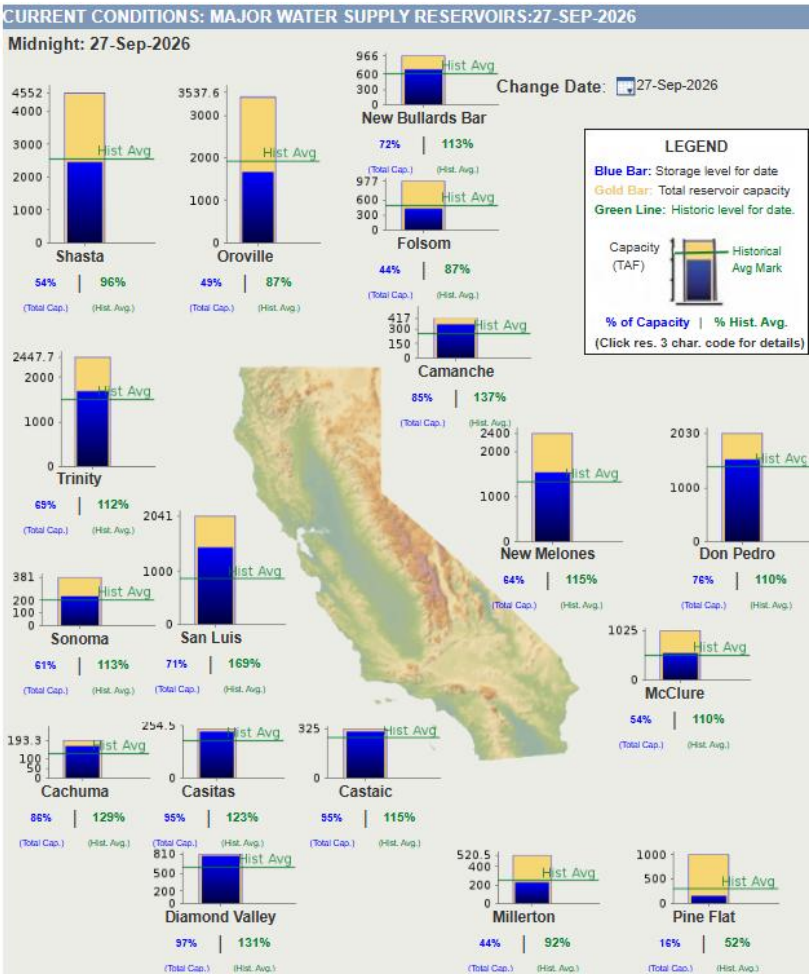
New laws signed by Governor Newsom will increase scrutiny of the water and energy demands of data centers. AB 2469 and AB 2619 require proposed facilities to address water supply and scarcity and, in some circumstances, pay for new or expanded water infrastructure needed to serve them.

The Governor took final action of his career on all of the legislation passed by the legislature in August. Final action saw two of the three Golden mussels bills not making it to the finish line and both of the tribal rights bills being vetoed by the Governor. WateReuse CA and CASA's co-sponsored bill concerning the Clean Water SRF was signed by the Governor.

Municipal Water District of Orange County
Status Report – September 2026

Water Supply Conditions

California is ending the 2025–26 water year on September 30 with a mixed but generally manageable water-supply picture. Statewide reservoir storage is about 102 percent of the historical average, as of September 26; major reservoirs vary, with Shasta at 54 percent of capacity and 101 percent of average, Oroville at 49 percent of capacity and 90 percent of average, and San Luis at 71 percent of capacity and 170 percent of average. With the new water year beginning October 1, attention is turning to the winter precipitation outlook and whether California can rebuild storage through rain and snow over the coming months.



Bay-Delta Plan Faces Federal and Agricultural Opposition as State Moves Toward October Decision

The State Water Resources Control Board is moving toward an October decision on its proposed update to the Bay-Delta Water Quality Control Plan, but the plan is facing significant opposition from both the federal government and Westlands Water District, as well as strong concerns from other agencies. The Board released its final draft plan in August and accepted comments through September 18; the proposal would establish a voluntary Healthy Rivers and Landscapes pathway for participating water users while maintaining a regulatory pathway for others and would add Tribal Tradition and Culture as a protected beneficial use.

The U.S. Bureau of Reclamation argues that the plan could restrict federal water deliveries to Central Valley agriculture and said the federal government would withhold funding for certain habitat-restoration projects if the state does not make changes. Westlands separately announced that it would withdraw from the Healthy Rivers and Landscapes Program unless the state reverses course, arguing that the final draft substantially departs from the commitments made in the 2022 Voluntary Agreement framework.

The State Board continues to characterize Healthy Rivers and Landscapes as a collaborative approach intended to improve environmental conditions while maintaining water-supply reliability. The Board is scheduled to consider adoption of the final plan on October 28–29, making the next month particularly important for the future of Sacramento River and Delta water management.

MWD sent several comment letters on the Final Draft. The first, was just from MWD and addresses three main issues: the Definition of "New Water Supply Projects;" protection of base flows; and implementation of new interior delta flow narrative objectives.

The second letter was a letter was signed by 13 MWD member agencies. This letter more broadly supported the existing Healthy Rivers and Landscapes program.

For Southern California, the outcome could affect both the regulatory framework governing State Water Project supplies and the prospects for a negotiated alternative to more traditional flow-based regulation.

Sites Reservoir Moves Closer to Construction

The proposed Sites Reservoir took several important steps forward in September. On September 3, the State Water Resources Control Board (SWRCB) released a revised draft water-right decision that would allow the 1.5-million-acre-foot off-stream reservoir to divert up to 986,000 acre-feet annually, subject to conditions designed to protect senior water rights, water quality and fisheries. The revised permit also incorporates compliance pathways from the final draft Bay-Delta Plan and the Healthy Rivers and Landscapes program.

The project received another important approval when the SWRCB issued its final water-quality certification on September 10. Later in the month, the Sites Project Authority moved into an investment phase, and Governor Newsom announced that the project is closer to construction.

The final water-right permit is scheduled for a SWRCB vote on November 4, with written comments on the revised permit due October 5.

Federal involvement is also continuing. The Bureau of Reclamation is negotiating an Excess Capacity Contract with the Sites Project Authority governing use of federal facilities to convey Sites water, with another public negotiation session scheduled for September 28.

Golden Mussel Response Shifts Toward Emergency Treatment

The golden mussel infestation continues to expand from an invasive-species concern into a major water infrastructure challenge. DWR says the species can clog pipelines, screens and filters and affect water delivery, hydropower and other infrastructure. Because golden mussels tolerate a broader range of temperature and salinity conditions than quagga and zebra mussels, more California water bodies and interconnected delivery systems are potentially vulnerable.

The response is becoming increasingly hands-on. In September, Semitropic Water Storage District in the San Joaquin Valley declared an emergency after detecting golden mussels in its conveyance facilities and authorized emergency contracting for copper treatment intended to eradicate or minimize the infestation. DWR is simultaneously pursuing a statewide strategy that includes expanded monitoring, eDNA testing, copper treatments, manual cleaning, ultraviolet systems and research into additional treatment options.

The implications for Southern California are significant as the State Water Project provides a major pathway for moving water from Northern California into the region. Continued spread could increase monitoring, treatment, maintenance and capital costs at facilities throughout the interconnected water system, while requiring agencies to develop more stringent protocols for reservoirs, boats and water conveyance.

California Prepares for a Potentially Very Wet Winter

California's water managers are preparing for a major shift in hydrologic conditions as a potentially very strong El Niño develops in the Pacific. On September 21, Governor Newsom proclaimed a statewide emergency to accelerate preparations for winter storms, flooding, landslides, debris flows and coastal flooding. The proclamation directs state agencies to stage flood-fighting supplies and equipment and prepare vulnerable infrastructure and communities.

The potential for a wet winter comes after a relatively dry end to the 2025-26 water year. The state's water managers therefore face a familiar California challenge: preparing to capture substantial winter runoff while maintaining enough reservoir space for flood protection and preserving supplies in case the anticipated precipitation does not materialize.

The state's response to El Niño also highlights the increasing importance of managing both flood and drought risks within the same water year.

Groundwater Recharge Gains Attention as Statewide Water Supply Strategy

The California Water Commission devoted a significant portion of its September meeting to groundwater recharge, bringing together state agencies and water managers from the Central Valley, Central Coast and Southern California to discuss how California can expand the use of

groundwater basins as strategic water storage. The discussion included presentations from the Department of Water Resources, State Water Resources Control Board, Department of Fish and Wildlife, Tulare Irrigation District, Madera County, Pajaro Valley Water Management Agency and Orange County Water District. The Commission characterized groundwater recharge as an increasingly important tool for managing California's more variable hydrology—capturing water during wet periods for use during droughts and periods of reduced surface-water availability.

The presentations illustrated that recharge is taking very different forms around the state. In the San Joaquin Valley, districts are developing dedicated recharge basins and using agricultural land and other facilities to move excess rainfall underground, while groundwater managers are also looking at recharge as a way to meet Sustainable Groundwater Management Act requirements. On the Central Coast, the Pajaro Valley Water Management Agency has developed recharge and water-supply projects as part of a broader effort to address groundwater overdraft and seawater intrusion. Southern California has taken a different approach, emphasizing highly treated recycled water, advanced water purification and aquifer storage. Orange County's experience demonstrates how groundwater basins can function as large-scale regional reservoirs that can be replenished during favorable conditions and drawn upon when imported supplies are constrained.

The scale of the opportunity was a major theme. DWR notes that California's groundwater basins collectively can store at least 850 million acre-feet, compared with roughly 50 million acre-feet of capacity in the state's major above-ground reservoirs. Groundwater also becomes increasingly important during dry periods, when it can provide as much as 60 percent of the state's water supply. Recharge therefore offers a way to turn California's episodic wet years into longer-term water-supply security, particularly as warmer temperatures reduce the reliability of the Sierra Nevada snowpack.

The discussion also highlighted challenges that could limit how quickly recharge expands. Projects need suitable geology, available water, conveyance infrastructure and places where water can be safely infiltrated. Water managers must also address permitting, water rights, groundwater accounting, water-quality concerns and the timing of environmental flows. The different regional presentations underscored that there is no single statewide recharge model; projects need to be designed around local aquifer conditions, available water supplies and groundwater-management goals.

The Commission's discussion comes as California increasingly looks at groundwater basins as part of the state's broader water-storage portfolio. Rather than relying solely on new surface reservoirs, agencies are pursuing a combination of groundwater recharge, recycled water, stormwater capture, agricultural recharge and conjunctive-use projects. For Southern California wholesalers, these investments could become increasingly important as agencies seek to make imported supplies more valuable by storing water underground when it is available and using that storage to provide flexibility when State Water Project deliveries are reduced.

New Data Center Laws Put Water Supply Under Greater Scrutiny
The Governor signed a package of laws addressing the growing water and energy demands of data centers. On September 21, Governor Newsom signed seven bills requiring greater disclosure of data center water and electricity use. Two measures by Assemblymember Diane Papan—AB 2469 and AB 2619—specifically address water supply and planning. AB 2469 requires proposed data centers to complete a water supply assessment and water scarcity plan and requires them to pay for new or expanded water infrastructure needed to serve their operations

The legislation is significant for water agencies because large data centers can create concentrated new demands for water in areas already facing supply constraints. The new requirements give local governments and water suppliers additional information about proposed projects' water needs and require consideration of drought planning and infrastructure impacts before projects proceed.

Legislative Update
The Governor signed his final bills as Governor ahead of the 9/30 deadline. Barring a special session, this marks the end of Governor Newsom's participation in the California Legislative process.

Legislators remain in their districts ahead of the November elections and electeds will briefly return to Sacramento in early December for a day or two to "organize" before returning officially in January.

Final action on bills brought some victories and frustrations:

<u>State Water Contractors Sponsored Legislation:</u>
SB 872 (McNerney) has been amended into a major climate and water infrastructure funding bill.

Under the revised language, SB 872 would create the Delta Levees and Canal Subsidence Fund that would fund critical water system upgrades over the next two decades — beginning in the 2026–27 fiscal year through 2046–47.
Key provisions include:

- $150 million annually to the California Department of Water Resources for capital improvements aimed at restoring original conveyance capacity in state water facilities affected by land subsidence — a growing problem as pumping lowers groundwater levels and damages canals.
- $150 million annually to the Sacramento-San Joaquin Delta Conservancy for levee repairs and related projects in the Delta, strengthening flood protection and habitat conditions.

The bill was amended to take out a specific funding source, which will lead to more discussions on the concept during the budget process.

The bill also includes a restriction that these funds cannot be used for the design, construction, operation, mitigation, or maintenance of new Delta conveyance facilities beyond existing infrastructure.

The final Proposition 4 allocations allocate $68 million for regional conveyance or repair of existing projects, with $30 million specifically for State Water Project Canals. Additionally, $100 million for levees, Delta levees, dam safety/climate resilience- $30M for SWP Delta Levees; $75M for Sac-San Joaquin Delta levees.

The Governor vetoed the bill, siting the Proposition 4 allocations and the fact at the bill set up a fund with no funding source.

AB 2215 (Calderon): moves a portion of the DCP Trailer Bill from 2025 into a policy bill. AB 2215 would adjust the beneficial use timeline for the completion of construction work for specific water right permits held by the Department of Water Resources for the operation of the State Water Project be December 31, 2045. The bill passed out of the Assembly Water, Parks and Wildlife Committee 11-0 and the Appropriations Committee and was approved by the full Assembly 57-1. ACWA recently took a support position on the bill. The bill was pulled from hearing the Senate Natural Resources and Water Committee on July 1 due to a lack of support from committee members and unfortunately did not move forward in 2026.

<u>CASA & WateReuse CA:</u>
CASA and WateReuse CA's co-sponsored legislation, AB 2777, to add more capacity to the Clean Water State Revolving Fund and make it easier for agencies to get larger loans or reduce burdensome requirements passed through the process with no no votes. The bill was signed the Governor.

<u>Other significant legislation:</u>

- **AB 1881 (Ramos)** and **AB 2218 (Kalra)** on tribal water rights. Both bills give tribes significant powers over infrastructure projects. Stakeholders have been working with the authors and sponsors to work out mutually aggregable language, but those talks stalled in recent weeks. Both bills were vetoed by the Governor. The Governor stated that he is concerned with the far-reaching impacts of AB 1881 on the basic operations of state government. On AB 2218, he stated he is concerned the bill would add new layers of process that would delay policies that will protect water supplies from climate change.
- Golden Mussels Bills

    - **AB 2032 (Ransom)**: specifies specific actions for the state to undertake to research and provide best management practices for eradication. The bill has an urgency clause, but passed off the Assembly Floor well ahead of the 2/3 vote threshold with 78 "aye" votes. The bill has moved through the Senate fairly easily, and was signed by the Governor.

    - **AB 1772 (Papan):** creates a standardized boat inspection program for all reservoir operators. The bill was held in the Senate Appropriations Committee

- **AB 1894 (Rubio):** Addresses some agencies forbidding SWP water from entering a local system. The bill has been amended to address some concerns of other water users, including MWD. The Governor vetoed the bill stating that while he appreciated the author's intent, he is concerned of unintended consequences by the bill's "on-size-fits-all" approach prohibiting the denial of local water deliveries.

- **Advanced Clean Fleets:** AB 1436 (Avila Farias) was a late "gut and amend" intended to address the late 15-day changes from CARB on the State and Local Government rules in the ACF program. The bill proposed to prohibit CARB from regulating private fleets through requirements on public agency contracts. The bill was heard in the Senate Environmental Quality Committee but was one vote short of passing out of the committee. The Chair of the committee committed to bringing parties together to discuss the issue.

Legal and Regulatory

October 7, 2026

1. **Cost to Clean Ocean:** The State Water Resources Control Board is currently considering how much you should pay to keep the Pacific Ocean clean. They will determine how much and what can be released into the ocean. The MS4 system is a permit which people and business have to get to release anything that eventually ends up in the ocean. This Board sets the rules for Orange, Riverside and San Bernardino Counties. While this permit currently is given to each county, this process will require the same for all three counties. The current plans are quite different. San Bernardino County has done a report that shows the cost to their county alone will be over $11 billion. They claim that will cut into public safety and educations programs in their county. Environmentalists claim that the small cost over 20 years is well worth it. These new discussions will definitely impact water agencies and sanitation districts and will indirectly affect every resident.

2. **Sacramento Subsidence:** UCLA and Cal tech have studied the amount of damage to the Sacramento Valley groundwater aquifer in past years. This aquifer has actually maintained itself quite well until the 2020-2022 droughts. During that time their Sacramento River allocation was reduced to between 0 and 18%. That forced famers to start using more ground water. That produced subsidence in a few areas similar to experience in the San Joaquin Valley. Historically, Sacramento Valley was able to recharge their aquifer at sufficient levels to avoid subsidence. But during those years, it was impossible to keep up. The study did recognize that our methods for measuring the subsidence were not available many years ago. But they believe their conclusions are probably sound.

3. **PFAS Ban?:** AB 1603 proposed banning certain pesticides used in farm use which contained PFAS. The legislature rejected the proposal. The ag industry weighed in quite heavily based on damage to their business. Governor Newsom has vetoed a similar bill last year based on affordability and cost to business. There is still no agreement on the definitions of which chemicals fit into this category. Half of the US vegetables and ¾ of fruits and nuts come from California.

4. **Extreme Wildfire Causes:** The conventional wisdom is that hot and dry conditions are the main cause of extreme fires. This statement is true but a major study done by the US National Science Foundation has indicated that it is not entirely correct. They identified other elements which contribute to the “perfect storm” which make certain fires extreme and cause more damage. Weather, usually wind, topography, dry vegetation and ignition are the big ones which when they combine, are the cause. Many fires have one or two of these additional factors, but very few have all four. The length of the wind event is also important. A one day event of wind will not be a problem, but a continued event, like Santa Ana

conditions, is much more destructive. We have also seen changes of wind direction can change the entire outcome. Terrain and dry vegetation can be anticipated, but wind and ignition causes, not so much.

5. **Water Treatment:** The traditional treatment for removing perchlorate from water is to use large tanks with ion-exchange resin beads. The beads connect to the perchlorate ions and the water comes out clean. The problem is reusing or disposing of the hazardous beads. UC Riverside researchers have developed a catalyst containing small ruthenium nanoparticles that break down the perchlorate. This saves the beads for reuse and makes them non hazardous. Perchlorate is an important item for military and industrial uses. It can be manmade and occurs naturally. It can be very harmful to human's thyroid gland. As a result there are very strict contamination levels set by the State and Federal government. The discovery is very important for the continued use and protection from perchlorate products. A practical benefit of this discovery is that it can be used in existing water treatment plants without significant modification.

6. **Hayfield Filters:** Ranchers and farmers in Colorado recently financed a study to determine if the farming and grazing methods were helping or hurting water quality in their area. The study was conducted by Colorado State University and some of the farmers admitted they were a little nervous in the event the study showed issues with their methods. One of the big issues was the use of mountain hayfields, large grass filter strips, being placed around their farming and grazing areas. Many of these existed already, but many more were planted. They discovered that these grassy areas reduced sediment and absorbed nutrients and contaminants that would ordinarily find their way into runoff and the water system. Excess nutrients can cause algae blooms. Their current crop rotation, mainly corn and soybeans, and existing fertilizer mixes were handled well by the grass strip. They also studied grazing schedules and hay production was properly balanced.

7. **More PFAS:** The strongest bond in organic chemistry is the carbon-flourine bond. This bond is the basis of PFAS molecular structure. A fifth year PhD student, Susanna Maisto, at Yale University, aimed her doctorate at finding a cure for PFAS. After her lead professor told her to go the library to study, she did for 3 years. She developed a reaction of octanol (close to alcohol) with a PFAS molecule which causes it to double in size. In this condition, the molecule is not soluble but can be separated out naturally. This process is designed to be use onsite during the manufacturing process, before entering the water system. This is truly remarkable and being looked at for scaling up and commercial use.

8. **Nepal Flood:** After the Nepal devastation, people were asking if it could happen in California. The short answer is probably not but it could happen in other parts of the world. The Nepal flood has killed over 1000 people with another 4000 still missing. It is believed that rising temperatures, permafrost degrading and faster melting caused the slide. The glacier in question lost 2 million square feet of area and dropped 4000 feet into a narrow valley which fed the Lhende River. It was initially thought to be an earthquake as it registered 5.2 on the Richter scale. The rapid melt caused water to go through cracks in the glacier and form a layer of water underneath it. This allowed it to slide off the hillside. Dead ice was also a cause. Glaciers normally move during their lifespan. Dead ice is caused by lack of water in the ice, which stops its movement. This can cause the glacier to breakup prematurely and create an event like Nepal. There

are over 200,000 glaciers hanging on to mountains around the world. Similar, although not as bad, event have recently occurred in Swiss alps, Italy and India. There are still active glaciers in California. The largest is Palisade Glacier on the eastern Sierras. It is about one tenth the size of the Nepal glacier. While California used to be home to over 100 glaciers around 200 years ago, time and temperature has dramatically reduced that number. At some time in the future they may disappear completely. The risk California faces in the future is flooding from the rapid melting of snow falling in the Sierras. That is the fear from El Nino this winter.

9. **Delta Sediment:** Another report has come out stressing the need for sediment removal in the Delta. The Great Valley Farm Water Partnership is a group of farmers in the San Joaquin Valley. They suggest 7 actions needed to protect and save the Delta: increase southern storage, improve levees, install gates to control flow, improve export system, suppress non-native predators, control invasive weed, but first and foremost silt removal in the south Delta. Silt removal has many advantages: deeper channels reduce water temperature, hinder non-native and invasive activity, salmon would thrive, helps weakened levees survive, reduces flooding chances, reduces risk of salt water contamination, would increase export flow. Before 1970, dredging was a regular occurrence in the Delta and fish and folks got along fine.

10. **More Bark in Parks:** After the legislature passed AB 1572 which put limits on water used for non functional turf, cities and agencies have been taking various approaches. Many cities, including San Jose, will be replacing grass with bark or mulch. San Jose has over 50 parks impacted. They claim this will save water and money. They also stressed that this will not be happening in sports or picnic areas but only in side spots.

11. **EPA/WOTUS:** The EPA is seeking final comments regarding regulations controlling Waters of the United States. Since a 2023 US Supreme Court ruling reducing federal restrictions in these areas, the current administration has been working on regulations to balance property rights and federal water laws. They are trying to make the law more understandable and give more power to tribes and states regarding management of their lands. Final rules should be coming this November. This issue has been very contentious and will continue to be. Stay tuned.

WHITTINGHAM
PUBLIC AFFAIRS ADVISORS

TO: MWDOC Board of Directors

FROM: Whittingham Public Affairs Advisors

DATE: October 7, 2026

SUBJECT: October 2026 Local Legislative Report

Following are a few of the more notable developments and issues that have transpired in Orange County over the last several weeks:

- The County Board of Supervisors held a special meeting on September 24 to ratify the proclamation of a local emergency for this year's coastal flooding due to Hurricane Marie and El Niño season and to enable access to resources to address future preventative and repair work. County personnel are working to expedite permitting, connecting cities and residents with procurement vendors for storm response and preparation, and pursuing additional offshore dredging for sand replenishment at beaches countywide. Congressman Mike Levin joined other elected officials and representatives of Orange County Transportation Authority, OC Water District, and OC Public works last week to explore solutions to replenish beaches and provide stronger protection for coastal communities ahead of the upcoming storms.

- The County of Orange has paid out more than $128 million in public settlements since last October, bringing the settlement total to $386 million over the past five years. The Airport Fire, a 23,000-acre wildfire in 2024 that was started after a County Public Works crew accidentally sparked a fire while moving boulders, has resulted in $77 million in settlements this year alone, bringing the total amount of settlements related to the blaze to more than $160 million.

- Irvine Ranch Water District's Board of Directors interviewed four candidates to fill the vacant 1st District seat, which includes portions of Irvine, Lake Forest, Orange, and unincorporated Orange County. The Board ultimately voted to appoint Cindy Miller, a licensed civil engineer and Vice President at Hazen and Sawyer, to the position. Ms. Miller will serve as the Division 1 Director for the remainder of the term, which runs through November 2028.

- Lisa Kim, who has served as Garden Grove City Manager since March, 2023, announced her retirement effective in early November. Assistant City Manager Matt West has been tabbed to succeed her by the Garden Grove City Council; West previously served as City Manager in the City of Tustin. Ms. Kim previously served as

the City's Assistant City Manager, after lengthy service in the cities of Orange, West Covina, and Pomona.

- In addition to Garden Grove, the cities of Anaheim and Placentia are in the midst of considering potential candidates for their respective leadership positions. Since February, Assistant City Manager Greg Garcia has served as Interim City Manager in Anaheim, and longtime Costa Mesa City Manager Tom Hatch is serving as Interim City Administrator in Placentia.

- In San Juan Capistrano, City Manager Ben Siegel, who has served in that position since 2016, announced his plans to retire at the end of the year. The City Council has appointed Assistant City Manager Matisse Reischl to replace Mr. Siegel effective January 1, 2027.

- The Costa Mesa City Council unanimously approved a plan for the former Fairview Developmental Center with 2,300 new homes, 920 of which would be affordable. The Council approval concluded a four-year process that will help the city, which was one of five California cities sued by the State Attorney General for allegedly failing to comply with the Housing Element Law, to meet its state-mandated homebuilding goal of 11,760 new units by 2029. The final plan significantly lowered the amount of housing outlined in the draft land use document previously approved by the Planning Commission, which would have accommodated up to 4,000 units on the 80 acres of the shuttered Center. The Council cited concerns regarding traffic, public safety, and property values related to the impact of 4,000 new dwellings, and an estimated 10,000 new residents, on the surrounding Costa Mesa neighborhoods.

- The Santa Ana Regional Water Quality Control Board approved comprehensive new regulations that are intended to reduce pollution in water from storm drains and flood control channels in the Santa Ana River Basin, which covers large parts of Orange, San Bernardino, and Riverside Counties. When implemented, the water agency's new regulations, known as the Regional MS4 Permit, will require local government agencies to implement systems to keep trash and other contaminants from polluting the waterway. The Board's 3-1 vote to approve the permit came after hours of discussion and debate regarding the costs viability of compliance; San Bernardino County had commissioned an analysis that indicated the proposed stormwater requirements would cost the county and 16 of its cities $11 billion over the next 20 years. Amanda Carr, deputy director for Orange County Environmental Resources at OC Public Works, said that today's technology and best management practice-related projects would very likely not fully meet the strict bacteria numbers allowable under the new regulations. The regulations are scheduled to take effect in mid-March, 2027.

- GKN Aerospace announced a compensation program of up to $100 million for the 50,000-plus residents and local businesses across six cities who were forced to evacuate over the Memorial Day weekend when a failing chemical tank at the company's Garden Grove plant filled with potentially toxic and volatile methyl methacrylate. GKN has been working in conjunction with the District Attorney's Office and anticipates rolling out the compensation program in early October, along with announcements of community events, phone banks, and the location of a physical location for individuals to come in

and submit claims and obtain information. The program will allow businesses and residents to recoup costs associated with evacuations, including hotel stays, loss of wages, meals, and transportation.

- A number of Orange County cities are examining their zoning and emergency response procedures in response to the GKN event and a chemical leak from a building in La Habra in early September. The Irvine City Council unanimously approved new disclosure requirements for businesses in the city that utilize toxic substances, requiring notifications to residents within a quarter mile, and establishing new zoning restrictions for future businesses. City staff identified more than 1,100 Irvine businesses that work with chemicals but found that just seven rose to the level of needing a risk management plan, meaning they handle "acutely" dangerous chemicals in significant quantities.

- The Newport Beach City Council was ordered by an Orange County Superior Court judge to run a special election concurrent to the November 3 general election. Three resident-initiated ballot measures will appear on the special election ballot, which will be administered by the Newport Beach City Clerk rather than the Orange County Registrar of Voters. The general election ballot in Newport Beach will include the candidates seeking election to City Council, as well as The Responsible Housing Initiative, which if approved would implement a new housing plan that zones for fewer new homes, which could put the city at risk of a lawsuit from the State of California.

- The Board of Supervisors again deferred action on two new 66-year land leases the developer of two proposed hotels in Dana Point Harbor is seeking in order to secure financing. Approval of the leases has been held up by a lack of unanimity regarding protections for employees at the longtime Harbor hotel, the Marina Inn, as well as those at the two proposed hotels. The developer has stated that the repeated delays have eliminated any possibility of having the new hotels ready for the LA 2028 Olympics, which is holding the surfing competition at nearby Lower Trestles, south of San Clemente.

- The South Coast Air Quality Management District (SCAQMD) has delayed consideration of proposed Rule 1110.4, which targets emissions from emergency standby generators, until late Q1 or early Q2 of 2027. Much of the discussion centers on replacing older diesel units, which account for roughly 30% of the NOx reductions the District is seeking through the rule. District staff are focusing first on facilities with large amounts (>2.5MW) of installed generator capacity, but the many aging generators that water and wastewater agencies rely on at lift stations and other critical facilities remain a longstanding concern. A September 10 Working Group meeting was cancelled due to a scheduling conflict, and a new date for this meeting has not yet been announced.

- In early September, the Gibby Fire broke out off Ortega Highway in the Rancho Mission Viejo area, ultimately burning roughly 250 acres. Thanks to a helipod in San Juan Capistrano, OCFA helicopters were able to quickly respond to the blaze and prevent the loss of any homes or structures.

- Former Orange County Congresswoman and gubernatorial candidate Katie Porter was appointed to the California Community Colleges Board of Governors by Governor Gavin Newsom. The Board of Governors sets policy and provides guidance for the 73 districts and 116 colleges in the California community college system.

Whittingham Public Affairs Advisors continues to monitor the agendas of the 26 city and water district MWDOC members to identify items of relevance to MWDOC, as well as activities at the SCAQMD and Orange County Water District. It is a pleasure to work with you and to represent the Municipal Water District of Orange County.

Sincerely,



Peter Whittingham

Municipal Water District of Orange County Legislative Matrix

Updated 09/30/26

Measure	Author	Topic	Status	Brief Summary	Position
AB 2215	***Calderon, D***	*Water rights: permits: State Water Project.*	*Pulled from committee consideration by author.*	*This bill would require that the time periods for the application of water to beneficial use and for the completion of construction work for specific water right permits held by the Department of Water Resources for the operation of the State Water Project be December 31, 2046. (Based on 04/16/2026 text)*	*Support*
AB 1436	***Avila-Farias, D***	*State Air Resources Board: air pollution regulations: private fleets: exception*	*Failed in Senate Env. Quality Committee*	*This bill would prohibit the State Air Resources Board from enforcing any regulation that directly or indirectly compels compliance by private fleets, as provided, until the state has obtained a required waiver or authorization under the federal Clean Air Act.*	*Support*
AB 2739	**Soria, D**	Water: affordability and system stabilization	VETOED BY GOVERNOR	This bill would establish in the State Treasury the Water Affordability and System Stabilization Fund for holding the principal and income of the Water Affordability and System Stabilization Trust, which the bill would create.	Support (Sponsored by IRWD and Rancho Water)
SB 872	**McNerney, D**	Delta Levees and Canal Subsidence Fund.	VETOED BY GOVERNOR	This bill would establish the Delta Levees and Canal Subsidence Fund in the State Treasury and, upon appropriation, would make the moneys in the fund available to the Secretary of the Natural Resources Agency for expenditure consistent with the allocations described below. The bill would authorize the secretary to seek out, and the fund to accept, state moneys from, among other sources, any bond funds, the General Fund, or the Greenhouse Gas Reduction Fund. The bill would authorize the fund to accept moneys from nonstate sources, including federal and private moneys, and would continuously appropriate those moneys without regard to fiscal year, for allocation as described, thereby making an appropriation.	Support
SB 952	**Laird, D**	State Water Project: renewable energy resources and zero-carbon resources	SIGNED BY GOVERNOR	The bill would authorize, on and after January 1, 2036, excess procurement, as defined, of eligible SWP renewable energy resources and zero-carbon resources in one year to be applied to any subsequent year's obligation, as provided.	Support
SB 1048	**Becker, D**	State Seal of Climate Literacy	SIGNED BY GOVERNOR	This bill would establish the State Seal of Climate Literacy for the purpose of giving high school pupils personal agency to help them and their communities understand and adapt to the effects of climate change.	Support
SB 1125	**Menjivar, D**	Water Rate Assistance Program	VETOED BY GOVERNOR	Would establish the Water Rate Assistance Fund in the State Treasury, available upon appropriation by the Legislature, to provide water affordability assistance for residential water services to low-income residential ratepayers, as specified.	Support
AB 1603	**Schultz, D**	Perfluoroalkyl and polyfluoroalkyl substances (PFAS): Department of Pesticide Regulation.	SIGNED BY GOVERNOR	This bill would, commencing January 1, 2030, prohibit a person from using or marketing for agricultural use a pesticide, and from manufacturing, selling, delivering, holding, or offering for sale in commerce a pesticide registered for agricultural use, that contains specified PFAS pesticide ingredients and prohibit the registration for agricultural use of any pesticides containing these specified PFAS pesticide ingredients.	

Measure	Author	Topic	Status	Brief Summary	Position
AB 1752	***Lackey, R***	*Eminent domain: appraisals.*	*Held in Senate Appropriations Committee*	*This bill would require a public entity that offers to purchase property under a threat of eminent domain related to specified purposes to pay the full reasonable costs of an independent appraisal ordered by the owner, not to exceed $8,000. (Based on 05/18/2026 text)*	
AB 1772	***Papan, D***	*Fish and wildlife: invasive mussels.*	*Held in Senate Appropriations Committee*	*Existing law, until January 1, 2030, generally prohibits a person from possessing, importing, shipping, or transporting in the state, or from placing, planting, or causing to be placed or planted in any water in the state, invasive mussels, and authorizes the Director of Fish and Wildlife or the director's designee to engage in various enforcement activities, including ordering the areas in conveyance that contain water be drained, dried, or decontaminated, as provided. This bill would prohibit a conveyance from being launched until a specified drying period has completed, as provided. By expanding the scope of a crime, this bill would impose a state-mandated local program. The bill would require the department to require water supply system operators to update their plans to address all invasive mussel species present in the operator's water system as of January 1, 2026, as provided. (Based on 04/27/2026 text)*	
AB 1821	**Pacheco, D**	California Public Records Act: agency response time.	SIGNED BY GOVERNOR	The California Public Records Act requires each state or local agency, upon a request for a copy of records that reasonably describes an identifiable record or records, to make the records promptly available to any person upon payment of fees covering direct costs of duplication, or a statutory fee if applicable, except with respect to public records exempt from disclosure by express provisions of law. Existing law requires each agency, within 10 days of a request for a copy of records, to determine whether the request seeks copies of disclosable public records in possession of the agency and to promptly notify the person of the determination and the reasons therefor. Existing law authorizes that time limit to be extended by no more than 14 days under unusual circumstances, as defined. This bill would instead require each agency to determine whether the request seeks copies of disclosable public records in possession of the agency and to promptly notify the person as described above within 10 business days of a request for a copy of records. (Based on 04/06/2026 text)	
AB 1881	**Ramos, D**	California Indian Freedom Act of 2026.	VETOED BY GOVERNOR	This bill, the California Indian Freedom Act of 2026, would prohibit a governmental agency from substantially burdening a California Indian or California Native American tribe's exercise of religious beliefs or spiritual practices on state lands, including their access to and use of sacred sites and objects, and their ability to perform religious ceremonies and rites, even if the burden results from a rule of general applicability, unless the governmental agency demonstrates that application of the burden is in furtherance of a compelling governmental interest and is in the least restrictive means of furthering that interest. (Based on 05/19/2026 text)	

Measure	Author	Topic	Status	Brief Summary	Position
AB 1893	***Gallagher, R***	*Wildfire prevention: local assistance grant program: eligible activities.*	*05/14/2026 - Failed Deadline pursuant to Rule 61(b)(8). (Last location was APPR. SUSPENSE FILE on 4/22/2026)*	*This bill would expand eligible activities under the local assistance grant program to include projects undertaken by a local governmental entity involving the acquisition or installation of mobile rigid dip tanks or similar mobile and permanent infrastructure that is capable of providing helicopter-accessible water supplies for firefighting response or suppression purposes in very high fire and high fire hazard severity zones, as provided. (Based on 02/12/2026 text)*	
AB 1894	**Rubio, Blanca, D**	Fish and wildlife: invasive mussels: imported water.	VETOED BY GOVERNOR	This bill would prohibit a public agency from prohibiting imported water deliveries, as defined, for groundwater replenishment due to invasive mussels unless there is substantial, documented evidence of a proven health and safety risk as a result of the invasive mussels. (Based on 04/16/2026 text)	
AB 2013	***Bennett, D***	*High and very high fire risk areas: community water systems: preparedness and resiliency.*	*04/23/2026 - Failed Deadline pursuant to Rule 61(b)(5). (Last location was EMERGENCY MANAGEMENT on 4/7/2026)*	*Existing law requires the State Fire Marshal to identify areas in the state as moderate, high, and very high fire hazard severity zones based on consistent statewide criteria and based on the severity of fire hazard that is expected to prevail in those areas. This bill would require a community water system that services more than 100 customers that are located in a high or very high fire risk area, as defined, to include an annex to its disaster preparedness plans, as provided, that includes information regarding system preparedness and resiliency during a wildfire. The bill would require the annex to contain several things, including, among others, an assessment that identifies the minimum number of and type of water pumps that are necessary to maintain average daily capacity, including, but not limited to, the operation of fire hydrant systems at the rated capacity. (Based on 04/06/2026 text)*	
AB 2032	**Ransom, D**	Fish and wildlife: golden mussels.	SIGNED BY GOVERNOR	This bill would exempt from the requirement to obtain a restricted species permit for golden mussels a public or private agency that operates a water supply system and has submitted a control plan to the department for maintenance and operational activities to control the spread of golden mussels in the water supply system, as specified. (Based on 05/18/2026 text)	
AB 2045	**Connolly, D**	Habitat Restoration and Enhancement Act.	SIGNED BY GOVERNOR	The Habitat Restoration and Enhancement Act authorizes a project proponent to submit a habitat restoration or enhancement project to the Director of Fish and Wildlife for approval. The act makes moneys in the Habitat Restoration and Enhancement Account available to the department, upon appropriation by the Legislature, for the purposes of administering and implementing the act. Existing law repeals the act on January 1, 2027. This bill would extend the operation of the act until January 1, 2032, and would require the department to submit a report on the implementation of the act to the Legislature no later than December 31, 2029. (Based on 04/16/2026 text)	
AB 2218	**Kalra, D**	Water policy: California Native American tribes.	VETOED BY GOVERNOR	Would require the state government to support California Native Americans to maintain cultural and linguistic traditions, practice ecosystem stewardship, and engage in good faith government-to-government consultations with all California Native American tribes regarding policies that may affect tribal communities. (Based on 04/16/2026 text)	

Measure	Author	Topic	Status	Brief Summary	Position
AB 2381	***Johnson, R***	*Local Agency Public Construction Act: municipal water districts: sanitation districts: lowest responsible bidder.*	*04/23/2026 - Failed Deadline pursuant to Rule 61(b)(5). (Last location was L. GOV. on 3/9/2026)*	*The Local Agency Public Construction Act sets forth the requirements for competitive bidding on various types of contracts awarded by local agencies. Under current law, a municipal water district and a sanitation district, when letting a contract for $35,000 or more, is required to let the contract to the lowest responsible bidder. This bill would increase that threshold dollar amount to $220,000. The bill would require the Controller, commencing January 1, 2028, to adjust that amount annually to reflect the percentage change, as specified, and publish the adjusted amount on its internet website. (Based on 02/20/2026 text)*	
AB 2568	**Johnson, R**	Water district directors: compensation.	SIGNED BY GOVERNOR	Existing law authorizes a water district, as defined, to adopt an ordinance that provides compensation to members of the governing board, as specified. Existing law prohibits a water district from adopting an ordinance that compensates members of the governing board for more than a total of 10 days in any calendar month. This bill would, until January 1, 2032, authorize a water district that has at least 90,000 residents within its jurisdiction to adopt an ordinance that compensates members of the governing board for up to a total of 15 days in any calendar month, but would require the members of the governing board of a water district that compensates its members for more than 10 days in a calendar month to annually adopt a written policy describing, based on a finding supported by substantial evidence, why providing compensation for more than 10 days per calendar month is necessary for the effective operation of the water district. (Based on 04/27/2026 text)	
AB 2619	**Papan, D**	Water resources: data centers.	SIGNED BY GOVERNOR	Existing law authorizes the legislative body of an incorporated city and the county board of supervisors to license businesses carried on within their respective jurisdictions and to set license fees, as specified. This bill would require a person who owns or operates a data center, prior to applying to a city or a county for an initial business license, equivalent instrument, or permit, to provide its water supplier, under penalty of perjury, an estimate of the expected water use, the anticipated source of water, and the data center's projected water use volume for the maximum day, maximum month, and average year. When applying to a city or county for an initial business license, the bill would require a person who owns or operates a data center to report, under penalty of perjury, on the application, an estimate of the expected water use, the anticipated source of water, and the data center's projected water use volume for the maximum day, maximum month, and average year. When applying to a city or county for a renewal of a business license, equivalent instrument, or permit, the bill would require a person who owns or operates a data center to report, under penalty of perjury, on the application, the data center's annual water use for the preceding calendar year, including total water use, direct water use, and indirect water use, as prescribed. (Based on 04/08/2026 text)	

Measure	Author	Topic	Status	Brief Summary	Position
AB 2630	***Bennett, D***	*Water diversion and use: adoption of regulations.*	*04/23/2026 - Failed Deadline pursuant to Rule 61(b)(5). (Last location was NAT. RES. on 3/24/2026)*	*Existing law authorizes the State Water Resources Control Board to adopt regulations requiring measurement and reporting of water diversion and use by persons, including, among others, those authorized to appropriate water under a permit, a license, a registration for small domestic, small irrigation, or livestock stockpond use, or a certificate for livestock stockpond use. For the initial regulations, existing law requires that they be adopted as emergency regulations and provides that the emergency regulations remain in effect until revised by the state board. Existing law also exempts the initial regulations from the California Environmental Quality Act. This bill would require, until January 1, 2032, that all further regulations adopted by the state board pursuant to these provisions be adopted as emergency regulations and remain in effect until revised by the state board, and would exempt them from the California Environmental Quality Act. (Based on 03/26/2026 text)*	
SB 986	***Seyarto, R***	*Major regulations.*	*05/14/2026 - Failed Deadline pursuant to Rule 61(b)(8). (Last location was APPR. SUSPENSE FILE on 4/27/2026)*	*harm to the public peace, health, safety, or general welfare. This bill would prohibit a major regulation from taking effect until submission to, and expiration of a 60-day review period by, the Legislature, except as provided for emergency regulations. The bill would, prior to the expiration of the 60-day review period, require the Legislature to hold an informational hearing on the major regulation. (Based on 04/15/2026 text)*	
SB 994	**Cabaldon, D**	Local agencies: nondisclosure agreements.	SIGNED BY GOVERNOR	This bill would prohibit a local agency official, as defined, acting in their official capacity from entering into, or requesting that another individual enter into, a nondisclosure agreement relating to public business that precludes their ability to share information with fellow local agency officials serving on the same council, board, commission, district, or agency. The bill would require a local agency official in violation of that provision to, among other things, disclose the existence of the nondisclosure agreement, as specified, and would provide that these requirements imposed on a local agency official also apply to a local agency official acting in their official capacity who entered into, or requested that another individual enter into, a nondisclosure agreement described above before January 1, 2027. (Based on 04/23/2026 text)	
SB 1001	***Archuleta, D***	*Local agency, public utility, or mutual water company: personnel access: Personal Identity Verification-Interoperable.*	*05/14/2026 - Failed Deadline pursuant to Rule 61(b)(8). (Last location was APPR. SUSPENSE FILE on 4/27/2026)*	*Existing law authorizes officers of the Department of the This bill would, beginning on July 1, 2028, require the Office of Emergency Services, upon request, to issue a local agency, public utility, or mutual water company responsible for public works and critical infrastructure with specified credentialing to facilitate personnel access to an area during or following a natural disaster, act of terrorism, or other man-made disaster. The bill would specify that the credentialing, a Personal Identity Verification-Interoperable (PIV-I), would conform with the federal Personal Identity Verification standards pursuant to federal National Incident Management System guidelines. (Based on 04/21/2026 text)*	

Measure	Author	Topic	Status	Brief Summary	Position
SB 1085	**Durazo, D**	Water supply planning: housing developments.	SIGNED BY GOVERNOR	Existing law requires a city or county that determines a certain type of project is subject to the requirements of CEQA to identify any public water system that may supply water for the project and to request those public water systems to prepare a specified water supply assessment, as provided. This bill, among other things, would instead require a city or county, upon receipt of a preliminary application for a housing development project that meets certain conditions, or upon a development application for certain projects being determined as complete or deemed complete, to make that identification of public water systems. The bill would require a city or county, within 15 days of receiving an application that meets either of the above-mentioned criteria, to request each identified public water system to determine whether the projected water demand associated with the proposed project was included in the most recently adopted urban water management plan. (Based on 04/23/2026 text)	
SB 1123	***Wiener, D***	*Administrative Procedure Act: major regulations.*	*Did not get hearing in Assm*	*This bill would require an agency, in estimating the economic impact of adopting, amending, or repealing a regulation, to identify and calculate any offsetting benefits, impacts, or savings that might result directly or indirectly from that adoption, amendment, or repeal and factor those benefits, impacts, or savings into its economic impact estimate. (Based on 02/17/2026 text)*	
SB 1153	**Caballero, D**	Disaster preparedness: urban retail water suppliers and public water systems: wildfire.	SIGNED BY GOVERNOR	This bill, beginning January 1, 2028, would require all urban retail water suppliers, as defined, serving a high or very high fire hazard severity zone to include incident-specific response procedures for wildfires as part of their disaster preparedness plans, including any applicable emergency response plan as required by federal law. The bill would require these plans to include, among other things, mitigation actions, including actions, procedures, and equipment, that can obviate or significantly lessen the impact of a wildfire on the water system and the supply of drinking water provided by the water supplier. Because violation of these requirements by certain urban retail water suppliers would constitute a misdemeanor, the bill would expand the scope of a crime, thereby imposing a state-mandated local program. (Based on 04/28/2026 text)	
SB 1187	**Durazo, D**	Open meetings: majority.	SIGNED BY GOVERNOR	Existing law, the Ralph M. Brown Act, requires, with specified exceptions, that all meetings of a legislative body, as defined, of a local agency be open and public and that all persons be permitted to attend and participate. Existing law defines “meetings” for these purposes to mean any congregation of a majority of the members of a legislative body at the same time and location, as specified, to hear, discuss, deliberate, or take action on any item that is within the subject matter jurisdiction of the legislative body. This bill would define “majority” for purposes of the act to mean the number of members of the legislative body equaling more than half of the total number of seats on the legislative body. The bill would specify that if a seat on the legislative body is vacant, that seat is to still be counted as a seat on the legislative body. This bill contains other related provisions and other existing laws. (Based on 02/19/2026 text)	

The Metropolitan Water District of Southern California
State Legislative Matrix: Second Year of Legislative Session
September 14, 2026

Bill Number and Author	Amended Date and Location	Title – Summary	Metropolitan Position	Effects on Metropolitan
AB 35 **D. Alvarez** **(D – San Diego)** **Sponsor:** San Diego County	Chaptered Signed by the Governor, Chapter 89, Statutes of 2026	**Safe Drinking Water, Wildfire Prevention, Drought Preparedness, and Clean Air Bond Act of 2024: Administrative Procedure Act: exemption: program guidelines and selection criteria.** This bill exempts the Safe Drinking Water, Wildfire Prevention, Drought Preparedness, and Clean Air Bond Act of 2024 (Proposition 4) from the Administrative Procedure Act (APA), which establishes rulemaking procedures and standards for state agencies in California, to expedite funding allocations.	**Support** Based on 2026 Legislative Priorities and Principles.	AB 35 would streamline the funding process for Proposition 4 projects and allow Metropolitan, its member agencies, and partner agencies to access funds more quickly and accelerate project timelines. Proposition 4 funding includes multiple critical areas for Metropolitan, including funding for groundwater management, water recycling, Delta levees, and repairs to regional conveyance.
AB 259 **B. Rubio** **(D – Baldwin Park)** **Sponsors:** California Special Districts Association, Three Valleys Municipal Water District	Amended 04/21/2025 Two-Year Bill Dead	**Open meetings: local agencies: teleconferences.** This bill eliminates the sunset on provisions added to the Brown Act by AB 2449, a bill that provided additional flexibility with Brown Act meeting procedures in the event of a board member's physical absence in connection with a "just cause" or "emergency circumstances," allowing those members to participate in the meeting remotely consistent with the process detailed in the bill.	**Support** Based on 2026 Legislative Priorities and Principles.	By removing the sunset on the Brown Act provisions, AB 259 preserves flexibility for Metropolitan and member agency board members to meet remotely and continue providing the public with essential services.

The Metropolitan Water District of Southern California
State Legislative Matrix: Second Year of Legislative Session
September 14, 2026

Bill Number and Author	Amended Date and Location	Title – Summary	Metropolitan Position	Effects on Metropolitan
AB 794 **J. Gabriel** **(D – Encino)** **Sponsors:** Clean Water Action, Environmental Working Group	Amended 04/10/2025 Two-Year Bill Dead	**California Safe Drinking Water Act: emergency regulations** This bill would authorize the State Water Resources Control Board (SWRCB) to adopt an emergency regulation for water quality based on federal regulations in effect on January 19, 2025, regardless of whether the requirements were repealed or amended to be less stringent. The bill would prohibit an emergency regulation adopted pursuant to these provisions from implementing less stringent drinking water standards, as provided, and would authorize the regulation to include requirements that are more stringent than the requirements of the federal regulation. The bill would require, on or before January 1, 2026, the SWRCB to adopt an emergency regulation and to initiate a primary drinking water standard for perfluoroalkyl and polyfluoroalkyl substances (PFAS).	**Oppose Unless Amended** Based on 2026 Legislative Priorities and Principles.	While AB 794 aims to protect public health, its approach circumvents the established regulatory process for setting Maximum Contaminant Levels (MCLs). Metropolitan's Legislative Priorities and Principles call for using the best available science to protect public health and improve water quality when setting MCLs. The broad scope of this bill, which would allow the SWRCB to set through emergency action primary and secondary MCLs for any chemical with a federal MCL, sets a dangerous precedent and fails to align with well-established regulatory principles.

The Metropolitan Water District of Southern California
State Legislative Matrix: Second Year of Legislative Session
September 14, 2026

Bill Number and Author	Amended Date and Location	Title – Summary	Metropolitan Position	Effects on Metropolitan
AB 1881 **J. Ramos** **(D – Highland)** **Sponsor:** Indigenous Justice	Amended 08/27/2026 Enrolled	**California Indian Freedom Act of 2026** This bill requires all state governmental agencies, with the exception of the State Water Resources Control Board, to allow California Native American tribes to access sacred sites located on state lands for the exercise of their religious beliefs or spiritual practices, except as necessary to protect public safety and security. The bill would also require state governmental agencies to obtain prior, informed consent of a California Native American tribe before undertaking a project on state land that may pose a risk to tribal sacred sites. The bill would also prohibit state agencies from substantially burdening a tribe's spiritual practices on state lands unless the governmental agency demonstrates that application of the burden is both: (1) in furtherance of a compelling governmental interest; and (2) the least restrictive means of furthering that interest. California tribes would also have standing in any court or administrative proceeding to enforce this prohibition.	**Watch and Amend** Based on 2026 Legislative Priorities and Principles.	While AB 1881 would expand protections for California tribes engaging in religious practices on state land, its broad language would likely result in indirect impacts to Metropolitan's priority projects and programs. The prior consent provisions of the bill provide California tribes with the discretion to withhold consent for actions that may risk altering sacred sites, which could impact critical water projects and programs. The private right of action created to enforce the bill's prohibition on substantially burdening a tribe's right to religious practice on state land could be utilized in any court or administrative hearing, likely leading to increased litigation and administrative proceedings. Metropolitan staff have requested amendments to refine the scope of the bill to a more practical approach that includes clear definitions and timelines. Among other things, these amendments would define what qualifies as public infrastructure and public service under the bill's state lands exemption language.

The Metropolitan Water District of Southern California
State Legislative Matrix: Second Year of Legislative Session
September 14, 2026

Bill Number and Author	Amended Date and Location	Title – Summary	Metropolitan Position	Effects on Metropolitan
AB 1894 **B. Rubio** **(D - City of Industry)** **Sponsors:** Upper San Gabriel Valley Municipal Water District, San Gabriel Valley Municipal Water District	Passed in Senate 08/17/2026 Enrolled	**Fish and wildlife: invasive mussels: imported water** This bill would prevent a public agency from prohibiting imported water deliveries for groundwater replenishment, as defined, due to invasive mussels if the importation complies with a specified invasive mussel control plan and unless there is substantial, documented evidence of a proven health and safety risk as a result of the invasive mussels.	**Support** Based on July 2026 Board Action.	AB 1894 seeks to respond to member agency challenges with a current LA County prohibition on receiving imported water due to concerns around the spread of invasive mussels. This proposal seeks to balance the importance of controlling the spread of invasive species while continuing to allow for deliveries of critically needed groundwater replenishment supplies.
AB 2032 **R. Ransom** **(D – Stockton)** **Sponsor:** San Luis and Delta Mendota Water Authority	Amended 08/13/2026 Enrolled	**Fish and wildlife: invasive mussels: golden mussels** This bill would exempt a public or private entity that operates a water supply system from certain California Department of Fish and Wildlife (CDFW) invasive mussel permitting requirements until CDFW approves or denies the agency's control plan. This bill also requires the California Department of Food and Agriculture and the State Water Resources Control Board to quickly and efficiently respond to the threat of golden mussels.	**Support** Based on 2026 Legislative Priorities and Principles.	AB 2032 is an urgency measure that will help California water agencies respond rapidly and effectively to the growing threat posed by invasive mussels. Invasive mussels can spread quickly through water conveyance systems, threatening critical water infrastructure, water supply reliability, water quality, and aquatic ecosystems. AB 2032 provides water agencies with the regulatory flexibility necessary to implement invasive mussel control plans without unnecessary permitting delays while maintaining coordination with state regulatory agencies.

The Metropolitan Water District of Southern California
State Legislative Matrix: Second Year of Legislative Session
September 14, 2026

Bill Number and Author	Amended Date and Location	Title – Summary	Metropolitan Position	Effects on Metropolitan
AB 2218 **A. Kalra** **(D – San Jose)** **Sponsors:** Shingle Springs Band of Miwok Indians, Karuk Tribe.	Amended 07/02/2026 Enrolled	**Water policy: California Native American tribes.** This bill would establish a statewide policy addressing historic inequities in California Native American tribes' access to and control over water through financial assistance, consultation on water projects, plans, and policies, protection of tribal beneficial uses, and incorporation of indigenous knowledge to restore and protect ecosystems. AB 2218 would require state agencies to implement this policy when revising, establishing, or adopting permits, regulations, policies, and grant criteria to address identified inequities, as well as identify and offer financial assistance to the tribes. The bill creates a mediation process managed by the Governor's Office of Tribal Affairs should a dispute between a California Native American tribe and one of those state agencies arise over the implementation of this policy. It also requires the State Water Resources Control Board to consult with California Native American tribes when investigating water rights on tribal ancestral lands.	**Watch and Amend** Based on 2026 Legislative Priorities and Principles.	Under the existing CEQA process, Metropolitan engages in cooperative and productive consultations with California tribes to limit impacts of drinking water infrastructure projects and engage in mitigation when impacts do occur. AB 2218 would create an additional tribal consultation process for every state entity that issues a permit for a water-related project. This duplication risks confusion, delay, and increased costs for critical Metropolitan and State Water Project permits or projects. The bill is also silent on how it will fund the required financial assistance for California Native American tribes. Metropolitan staff have requested amendments to attempt to bring further clarity to the wide-ranging obligations the bill would place on water permitting and policy. The proposed amendments would require state agencies to consider implementing the bill's policies instead of mandating they implement the bill. The amendments additionally clarify that the bill's financial assistance requirement would not be imposed on state and local agencies and would ensure the bill does not result in impacts to existing water rights or permits.

The Metropolitan Water District of Southern California
State Legislative Matrix: Second Year of Legislative Session
September 14, 2026

Bill Number and Author	Amended Date and Location	Title – Summary	Metropolitan Position	Effects on Metropolitan
AB 2215 **L. Calderon** **(D – Whittier)** **Sponsor:** State Water Contractors	Amended 04/16/2026 Senate Natural Resources and Water Committee Dead	**Water rights: permits: State Water Project.** This bill would extend the timeline for the full development of the State Water Project water right permits to December 31, 2046, the same term as existing, validated contracts for the State Water Project water supply.	**Support** Based on 2026 Legislative Priorities and Principles.	AB 2215 would grant a necessary time extension to more fully modernize the State Water Project infrastructure in response to climate change. This bill is consistent with the Governor's Executive Order N-16-15 (CA EO), January 31, 2025, which ordered the minimization of administrative obstacles to maximize water supplies. This legislative proposal implements this order without weakening environmental protections and while protecting existing due process protections.
AB 2739 **E. Soria** **(D – Merced)** **Sponsors**: Irvine Ranch Water District, Rancho California Water District	Amended 08/21/2026 Enrolled	**Water: affordability and system stabilization.** This bill would require the Department of Water Resources (DWR), upon appropriation, to develop the Community Water Affordability Program and would establish the Community Water Affordability Assistance Fund within the State Treasury. The program would provide funding in the form of grants to local water suppliers for water system repairs, rehabilitation and enhancements, water safety and quality, and other local water system infrastructure projects, for the purpose of reducing the amount of local ratepayer funding required for those projects.	**Support** Based on 2026 Legislative Priorities and Principles.	AB 2739 aims to establish a durable statewide funding framework to address water affordability by targeting key cost drivers and by creating a Low-Income Rate Assistance (LIRA) program and a system stabilization fund that can be used when funding is identified. This bill would support ratepayer affordability for our member agency retailers and also includes a fund that supports local infrastructure projects, which could be used to support upgrades to Metropolitan's water supply system and reductions in energy costs.

The Metropolitan Water District of Southern California
State Legislative Matrix: Second Year of Legislative Session
September 14, 2026

Bill Number and Author	Amended Date and Location	Title – Summary	Metropolitan Position	Effects on Metropolitan
SB 601 **B. Allen** **(D – Santa Monica)** **Sponsors:** California Coastkeeper Alliance, Defenders of Wildlife	Amended 07/10/2025 Dead	**Water: waste discharge** The intent of this bill is to restore Clean Water Act protections in California that were removed per the U.S. Supreme Court's 2023 *Sackett v. Environmental Protection Agency (EPA)* decision. However, the bill goes beyond restoring statutory protections and includes several provisions that expand regulatory requirements without the benefit of scientific analysis.	**Oppose** Based on 2026 Legislative Priorities and Principles.	Currently, SB 601 poses risks to Metropolitan and its member agencies by: increasing costs of waste discharge requirements (WDRs) permits for discharges of water when dewatering or operating water supply infrastructure, potentially requiring all such water to be recycled regardless of cost to comply; exposing Metropolitan and its Member Agencies to citizen suits in state court, and, for certain nexus waters, both state and federal court; and creating uncertainty in discharge permitting as the bill's ambiguous provisions and implications are likely to be litigated.
SB 872 **J. McNerney** **(D – Pleasanton)**	Amended 08/13/2026 Enrolled	**Delta Levees and Canal Subsidence Fund.** This bill would establish the Delta Levees and Canal Subsidence Fund in the State Treasury and require funds, upon appropriation by the Legislature, to be provided to the Department of Water Resources (DWR) to support capital improvements to restore water conveyance capacity for state water conveyance systems affected by subsidence. Additionally, this bill would require funds, upon appropriation by the Legislature, to be provided to DWR for levee improvements that would improve the sustainability of local or state water supplies, and projects that improve instream, riparian, flood plain, and wetland habitat.	**Support** Based on 2026 Legislative Priorities and Principles.	Appropriations to the proposed fund would help offset the capital costs of subsidence repairs and could reduce State Water Project (SWP) charges to contractors. The total cost of SWP subsidence repairs is estimated at $3 billion. Subsidence in the Central Valley has been caused by decades of overpumping of groundwater and was not caused by Metropolitan or the State Water Contractors. However, in the absence of state and federal funding, the costs for these critical repairs will be shifted to our agencies. Appropriations for improvements to levees within the Delta and other actions to t improve instream, riparian, floodplain, and wetland habitat could benefit Metropolitan directly by providing additional funding streams for levee improvements along district properties and indirectly through improvements within the Delta region.

The Metropolitan Water District of Southern California
State Legislative Matrix: Second Year of Legislative Session
September 14, 2026

Bill Number and Author	Amended Date and Location	Title – Summary	Metropolitan Position	Effects on Metropolitan
SB 935 **S. Choi** **(R – Irvine)**	Chaptered Signed by the Governor, Chapter 102, Statutes of 2026	**Local agency design-build projects: authorization.** This bill would repeal the sunset date of January 1, 2031, authorizing local agencies to use the design- build procurement process for public works construction projects more than $1,000,000 indefinitely.	**Support** Based on 2026 Legislative Priorities and Principles.	Repealing the sunset date for alternative project delivery processes is aligned with Metropolitan's policy to streamline procurement of public works construction contracts.
SB 952 **J. Laird** **(D – Santa Cruz)** **Sponsor:** State Water Contractors	Amended 08/06/2026 Chaptered Signed by the Governor, Chapter 175, Statutes of 2026.	**State Water Project: renewable energy resources and zero-carbon resources.** Existing law mandates that the Department of Water Resources (DWR) achieve a power portfolio that consists of 100% of renewable and zero-carbon energy by 2035. This bill would require DWR to also consider portfolio diversity, resource type, location, and hours of typical peak operation when procuring eligible resources to satisfy state agency obligations imposed on the State Water Project; and allow DWR to shift energy credits from one year to the next if DWR procures more energy than necessary in a given year.	**Support** Based on 2026 Legislative Priorities and Principles.	SB 952 is an important affordability measure for the 27 million customers within the SWP service area, as it would clarify generation attributes DWR may consider for procurement and create certainty for DWR by allowing excess energy procured in low water years be applied to years when SWP energy needs are high. Metropolitan pays a significant portion of the State Water Project's energy cost. This proposal provides a continued commitment to environmental sustainability while adding flexibility that maintains affordability.
SB 1125 **C. Menjivar** **(D – San Fernando Valley)** **Sponsors:** Clean Water Action, Community Water Center, Leadership Council for Justice and Accountability.	Amended 08/19/2026 Enrolled	**Water Rate Assistance Program.** This bill would establish the Water Rate Assistance Program and the Water Rate Assistance Fund, upon appropriation by the Legislature, administered by the State Water Resources Control Board (State Board) to help provide water affordability assistance for drinking water to low-income residential ratepayers. This bill would authorize the State Board to provide for the deposit of the following moneys into the Fund: federal or state funding; voluntary contributions, including gifts, grants, or bequests; and returned funds. The bill also allows the State Board to move forward with a partial implementation of the program if they determine that the Legislature appropriated enough money for a partial program.	**Support** Based on 2026 Legislative Priorities and Principles.	SB 1125 proposes a viable, reasonable path forward for Low-Income Rate Assistance that protects existing programs and limits the administrative burden on water suppliers. This bill is intended to be a companion measure to AB 2739 (Soria) and would guide the State Board's implementation of a low-income water rate assistance program. Water rate assistance would provide needed relief at the local retail level, leading to improved revenue stability for local water systems.

The Metropolitan Water District of Southern California
State Legislative Matrix: Second Year of Legislative Session
September 14, 2026

Bill Number and Author	Amended Date and Location	Title – Summary	Metropolitan Position	Effects on Metropolitan
SB 1326 **A. Wahab** **(D – Hayward)** **Sponsors:** Federated Indians Graton Rancheria, United Auburn Indian Community, Habematolel Pomo of Upper Lake, Picayune Rancheria of the Chukchansi Indians.	Amended 06/11/2026 Dead	**California Environmental Quality Act: tribal cultural resources: mitigation measures** This bill would revise the existing AB 52 (Gatto, 2014) tribal consultation requirements under CEQA to expand the definition of a tribal cultural resource to include: anything listed in a local tribal register and provided to the lead agency, included or eligible for inclusion in the California Register of Historical Resources or National Register of Historic Places, included in a local register of historical resources, or locations identified by the Native American Heritage Commission as a sacred place, including tribal cemeteries or burial areas. The bill would also require, when requested by a tribe, a lead agency to consider avoidance and preservation of a tribal cultural resource in place. If avoidance and preservation of the resource in place are not possible, the bill would require the lead agency to document the basis for that determination with substantial evidence and, when feasible, to adopt mitigation measures to avoid or minimize significant adverse impacts and incorporate culturally appropriate mitigation in consultation with the tribe.	**Watch and Amend** Based on 2026 Legislative Priorities and Principles.	In its consultation with tribes, Metropolitan works to ensure tribal voices are heard in the CEQA consultation process. By adding resources identified in a local tribal register to the definition of tribal cultural resources in CEQA, without specifying standard criteria for identification or a definition of local tribal register, SB 1326 could greatly increase the number of resources subject to AB 52's heightened requirement to avoid and minimize significant adverse impacts to the resource, when feasible. Without defined eligibility criteria for a tribal culture resource in law, lead agencies and the public would not have the opportunity to understand the nature of the resource. Metropolitan staff have requested amendments to include eligibility requirements for designating cultural landscapes and sites and objects included in a local tribal register as tribal cultural resources under CEQA.

Agenda Item No.10

STAFF REPORT

To:	**Board of Directors**	**Meeting Date: October 22, 2026**
From:	**Sherri Seitz, Public Affairs Manager**	
Subject:	**Public Education and Outreach Report`**	

Laguna Woods Village Television (LWVT)

Staff will provide an update on ETWD's monthly appearances on Laguna Woods Village Television's "This Day" program. The interviews provide an ongoing opportunity to share District news, programs, and timely water-related information with Laguna Woods Village residents.

Gate 4 Hydraulic Improvement Project Construction Alert

Staff distributed a construction alert flyer to residents in the immediate vicinity of the Gate 4 Hydraulic Improvement Project. A copy follows this report. ETWD also coordinated with Laguna Woods Village staff to broaden notification through the Village's email e-blast and website.

Community Advisory Group (CAG)

The next ETWD Community Advisory Group (CAG) meeting is scheduled for Thursday, November 12, 2026. General Manager Dennis Cafferty will provide an overview of ETWD's water supply sources, followed by a presentation from Harvey De La Torre, General Manager of the Municipal Water District of Orange County (MWDOC), who will discuss the current Colorado River water supply challenges and their potential impacts on Southern California's water supply.

Community/Speaking Engagement Events

H20 for HOA's – October 15, 2026

ETWD serves on the planning committee for H2O for HOAs and will host an informational booth at the October 15, 2026, event, scheduled from 8:00 a.m. to noon at the Bell Tower

Regional Community Center in Rancho Santa Margarita. The 2027 event is scheduled for Thursday, October 28, 2027, at Laguna Woods Village Clubhouse 5.

City of Disaster Preparedness Expo – October 17, 2026

ETWD staff will participate in the City of Mission Viejo's Disaster Preparedness Expo on October 17, 2026, at the Norman P. Murray Community and Senior Center. The District will provide its water trailer to offer complimentary drinking water and engage attendees in conversations about emergency preparedness and water service.

PROJECT ALERT

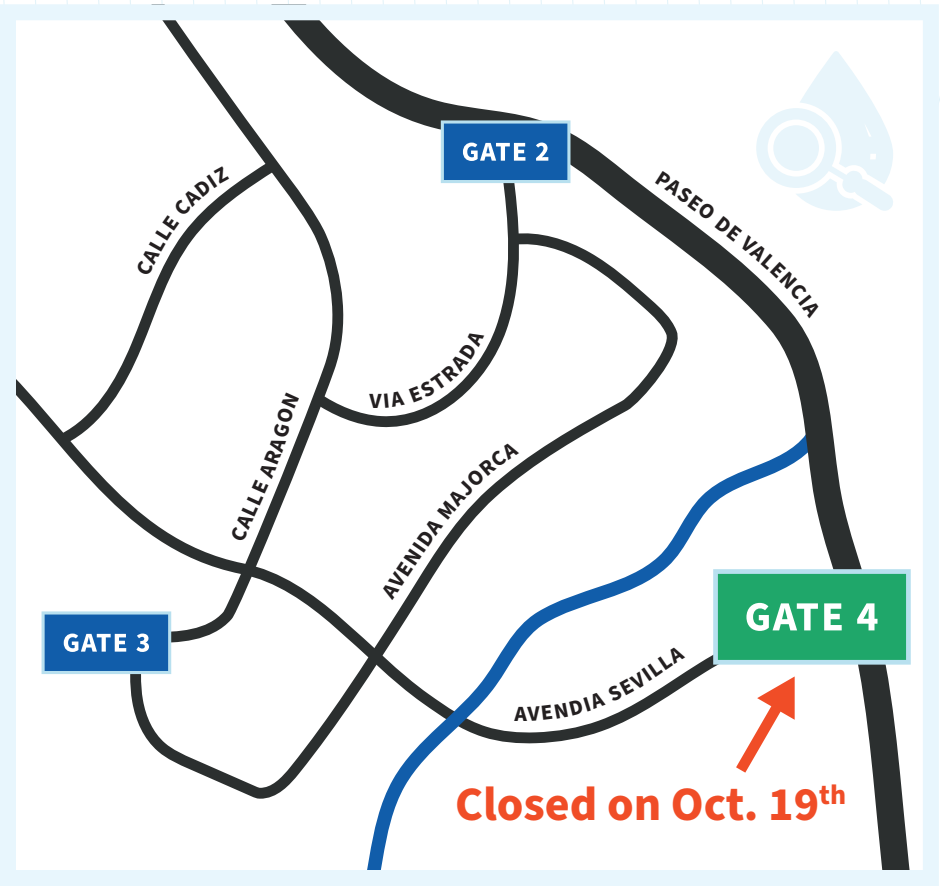
HYDRAULIC MODIFICATION PROJECT

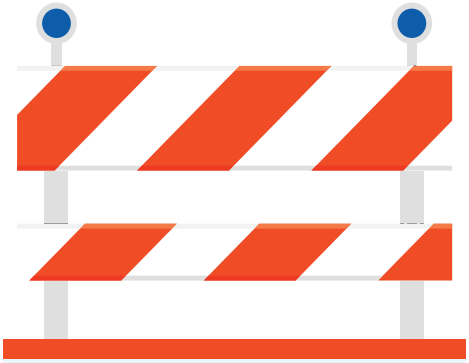
GATE 4 EXIT CLOSURE

Monday, October 19th from 8 am - 3 pm

About the Project

The Laguna Woods Village Gate 4 exit onto Paseo de Valencia will be closed for the full day on Monday, October 19 to allow El Toro Water District to perform utility investigation work in support of its emergency pressure improvement project. Residents should use alternate Gates 2 and 3 during the closure. ETWD appreciates the community's patience as this work is completed.





Questions

If you have any questions regarding the gate closure, you are encouraged to contact us.

(949) 837-7050

district@etwd.com

etwd.com

We thank you for your patience.

THERE WILL BE NO IMPACT TO RESIDENTS' WATER SERVICE DURING THE PROJECT.

Agenda Item No. 11

STAFF REPORT

To: Board of Directors **Meeting Date: October 22, 2026**

From: Vu Chu, Water Resources Supervisor

Subject: Water Use Efficiency Report

Rebate Programs:

The SoCal WaterSmart regional rebate program is available to ETWD customers through the collaboration of the Metropolitan Water District of Southern California, the Municipal Water District of Orange County, and ETWD.

Eligible device purchases may qualify for rebates, contingent on meeting eligibility criteria and subject to fund availability. Detailed residential and commercial rebate information is accessible at:

www.etwd.com/conservation/rebates
www.etwd.com/commercial-rebates

Actual Customer Rebates Analysis:

The following ETWD residential customer and commercial customer device rebates were approved by the Metropolitan Water District and the Municipal Water District of Orange County in September 2026.

The table below also shows the ETWD residential and commercial rebates approved for September 2026 and FY 2026-2027.

Rebate Program	September 2026	FY 2026/27
Spray to Drip – Residential		1,670 sq. ft.
Turf Replacement – Residential		1,491 sq. ft.
Turf Replacement – Commercial	2,438 sq. ft.	2,438 sq. ft.

Low Flow Showerheads		2
Irrigation Controller - Residential	1	1

Water Use Efficiency Plan Update:

The District Water Budget-Based Tiered Conservation Rate Structure (WBBTCRS) pricing structure is the primary plan that gives customers the incentive needed to be efficient. The Plan efforts initially will concentrate on those customers continually in the Inefficient and Excessive Tiers (Tiers 3 and 4). During September 2026, residential customers accounted for 57.3% of Tier 3 usage and dedicated irrigation accounted for 42.7%. For Tier 4, residential customers accounted for 43.2% and dedicated irrigation accounted for 56.8% during the same period.

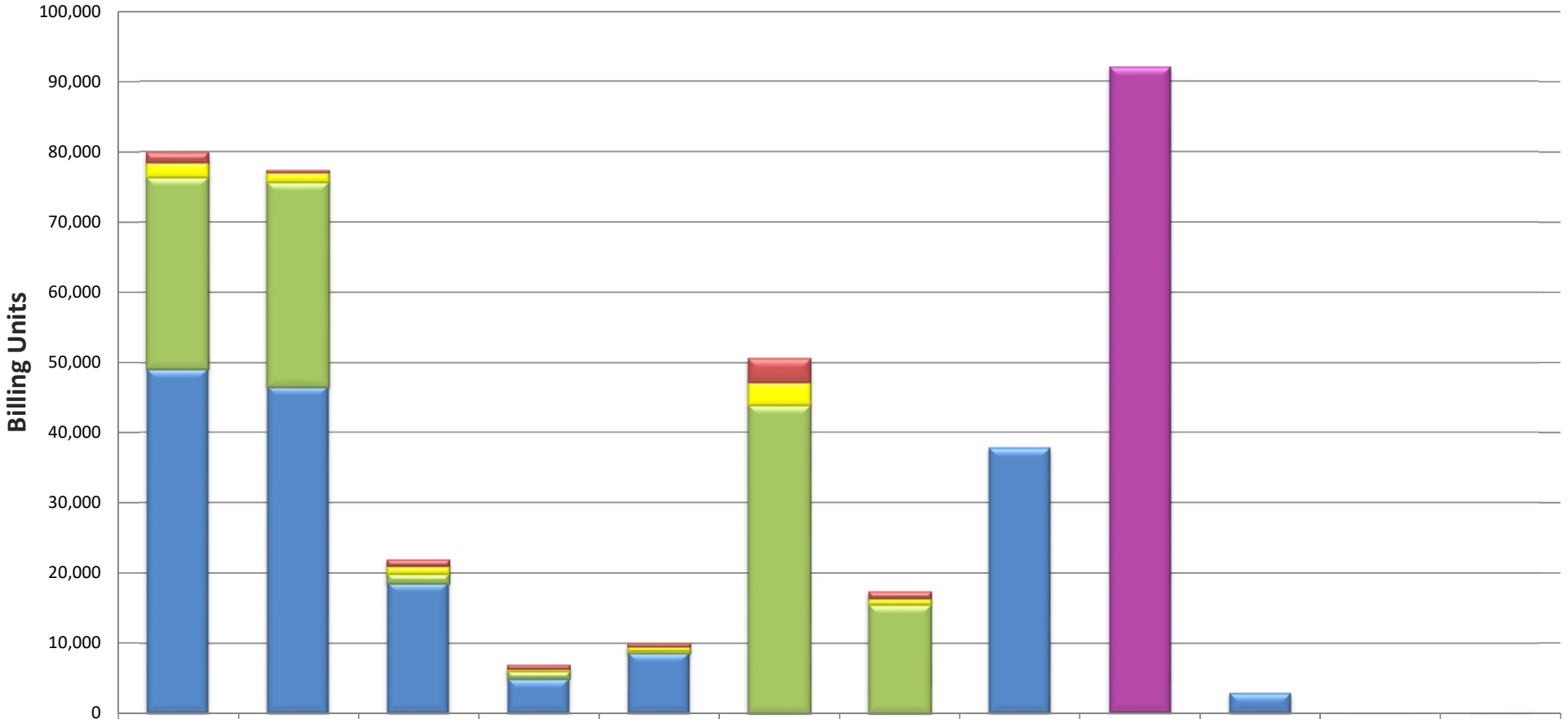
Total Consumption Comparison to Evapotranspiration (ET) Factor:

Included in this month's Water Use Efficiency Report is a chart comparing the current fiscal year consumption and ET factor to the fiscal 2025/26 consumption and ET factor. Total potable water consumption decreased by 1.00% in September 2026 compared to September 2025. On a year-to-date basis, potable water consumption through September is 3.24% higher compared to FY 2025–2026. During the same period, reference evapotranspiration (ETo) increased from 4.72 inches to 4.98 inches.

ETWD Tier Consumption Information and Usage Information Compared to Previous Years:

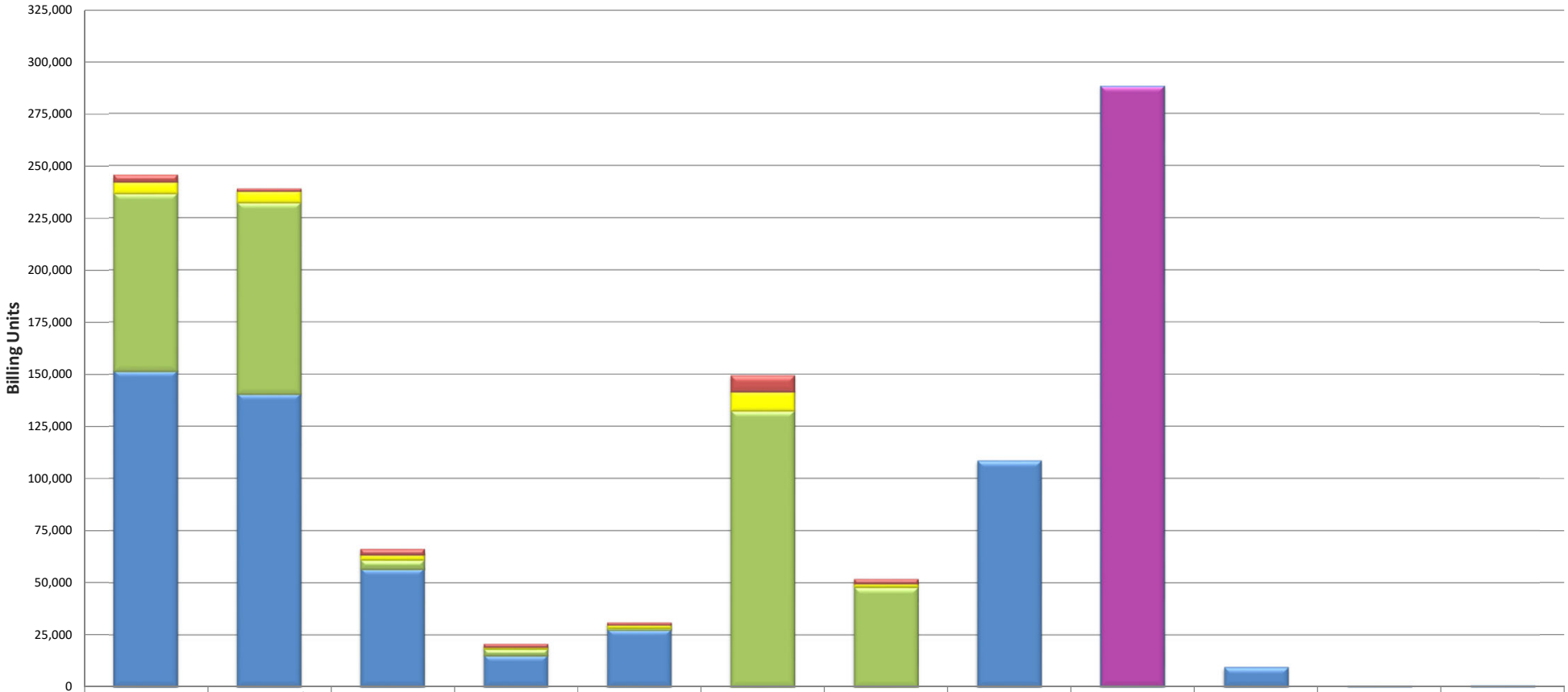
The following graphs highlight ETWD year-to-date consumption and consumption by tier for the current fiscal year compared to the 2025-2026 fiscal year. ETWD water consumption compared to 2013 and 2020 are also included.

September 2026 Water Sales

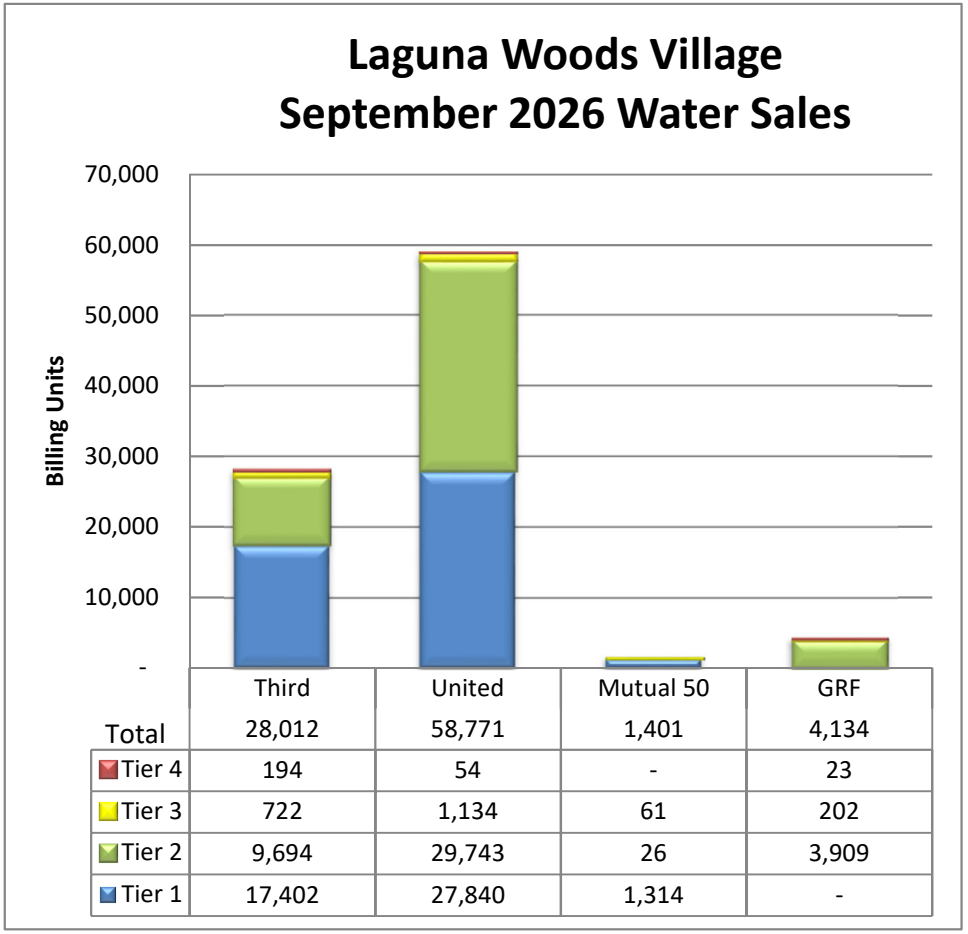


	Residential	Laguna Woods Village	Multi Family	Trailer Parks	Condo	Irrigation - Non-Functional	Irrigation - Functional	Commercial	Recycled Water	Public Authority	Private Fire	Flooding
Tier IV	1,345	239	828	442	338	3,335	864	0	0	0	0	0
Tier III	2,146	1,395	968	342	605	3,293	765	0	0	0	0	0
Tier II	27,178	29,044	1,335	1,013	221	43,873	15,601	0	0	0	0	0
Tier I	49,109	46,556	18,642	5,001	8,680	0	0	37,799	92,094	2,977	22	129

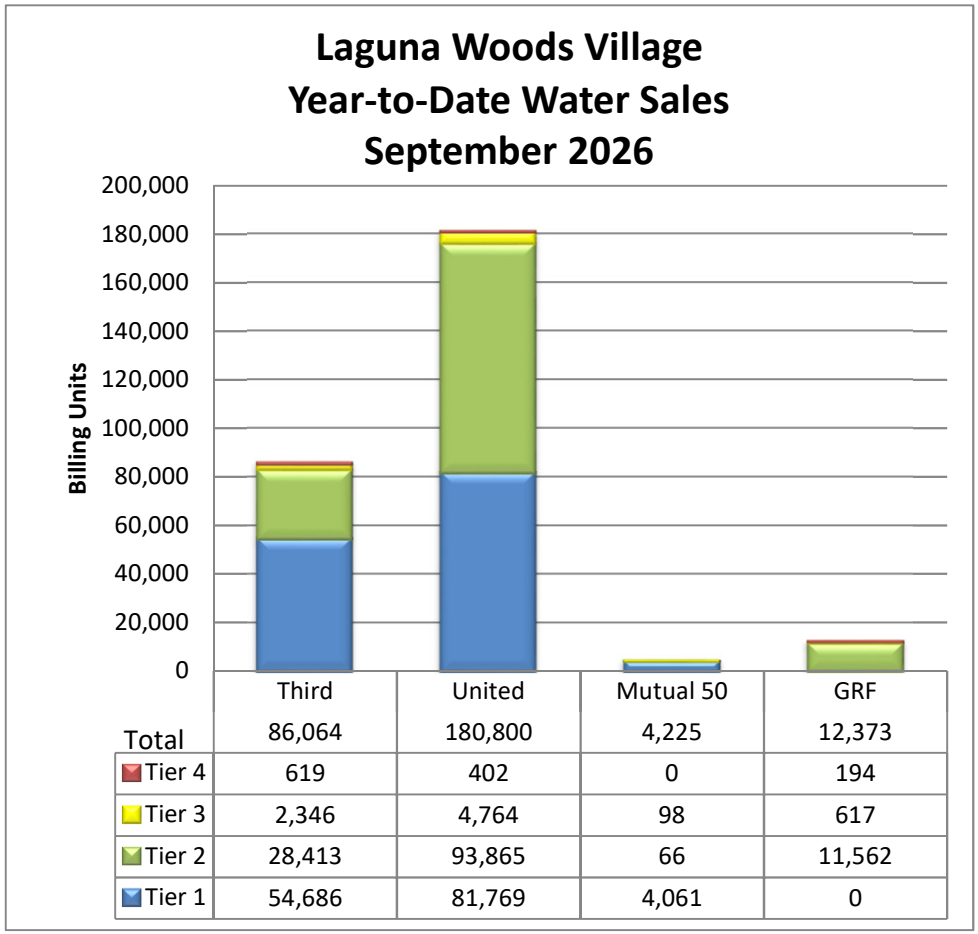
Year-to-Date Water Sales as of September 2026



	Residential	Laguna Woods Village	Multi Family	Trailer Parks	Condo	Irrigation - Non-Functional	Irrigation - Functional	Commercial	Recycled Water	Public Authority	Private Fire	Flooding
Tier IV	3,281	894	2,502	1,307	860	7,614	1,936	0	0	0	0	0
Tier III	5,554	5,548	2,830	911	1,750	9,286	2,016	0	0	0	0	0
Tier II	85,024	91,616	4,339	3,109	667	132,548	48,095	0	0	0	0	0
Tier I	151,447	140,516	56,806	15,129	27,566	0	0	108,337	287,987	9,212	53	317

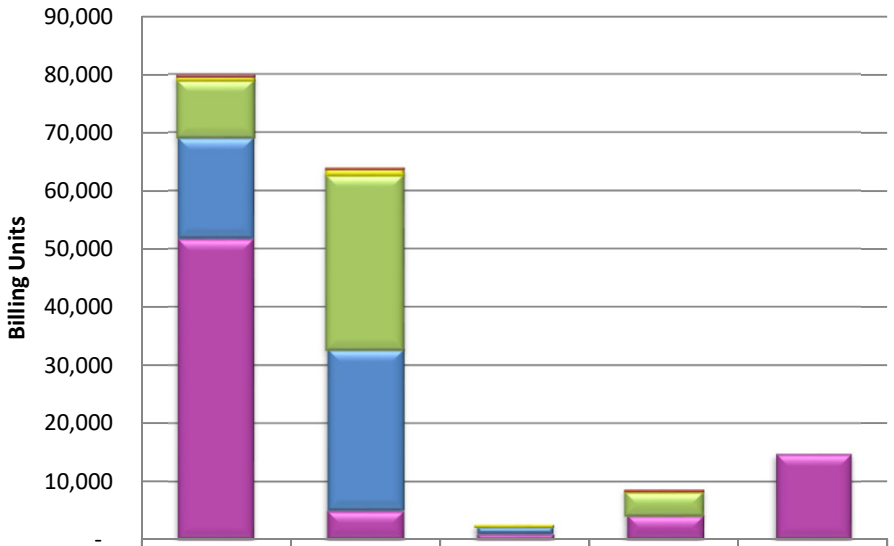


	Third	United	Mutual 50	GRF
Total	28,012	58,771	1,401	4,134
Tier 4	194	54	-	23
Tier 3	722	1,134	61	202
Tier 2	9,694	29,743	26	3,909
Tier 1	17,402	27,840	1,314	-



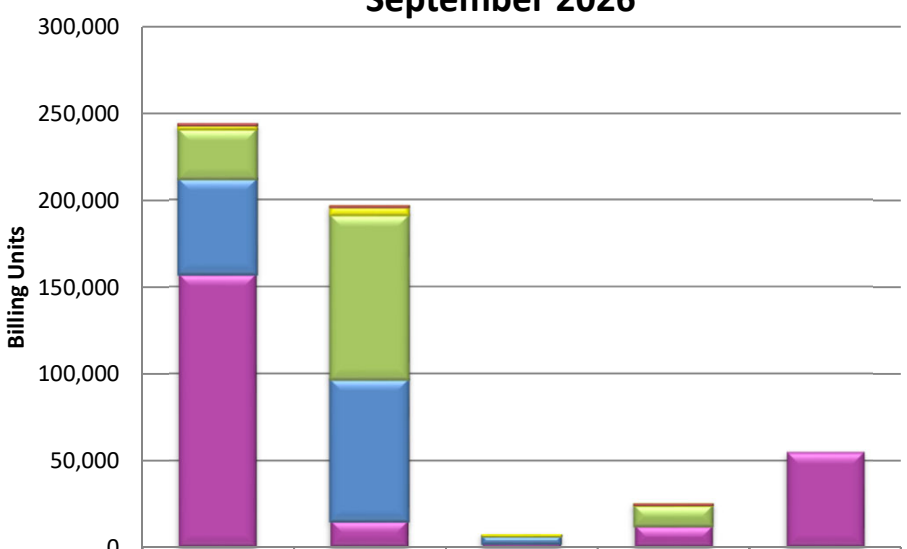
	Third	United	Mutual 50	GRF
Total	86,064	180,800	4,225	12,373
Tier 4	619	402	0	194
Tier 3	2,346	4,764	98	617
Tier 2	28,413	93,865	66	11,562
Tier 1	54,686	81,769	4,061	0

Laguna Woods Village
September 2026 Water & RW Sales

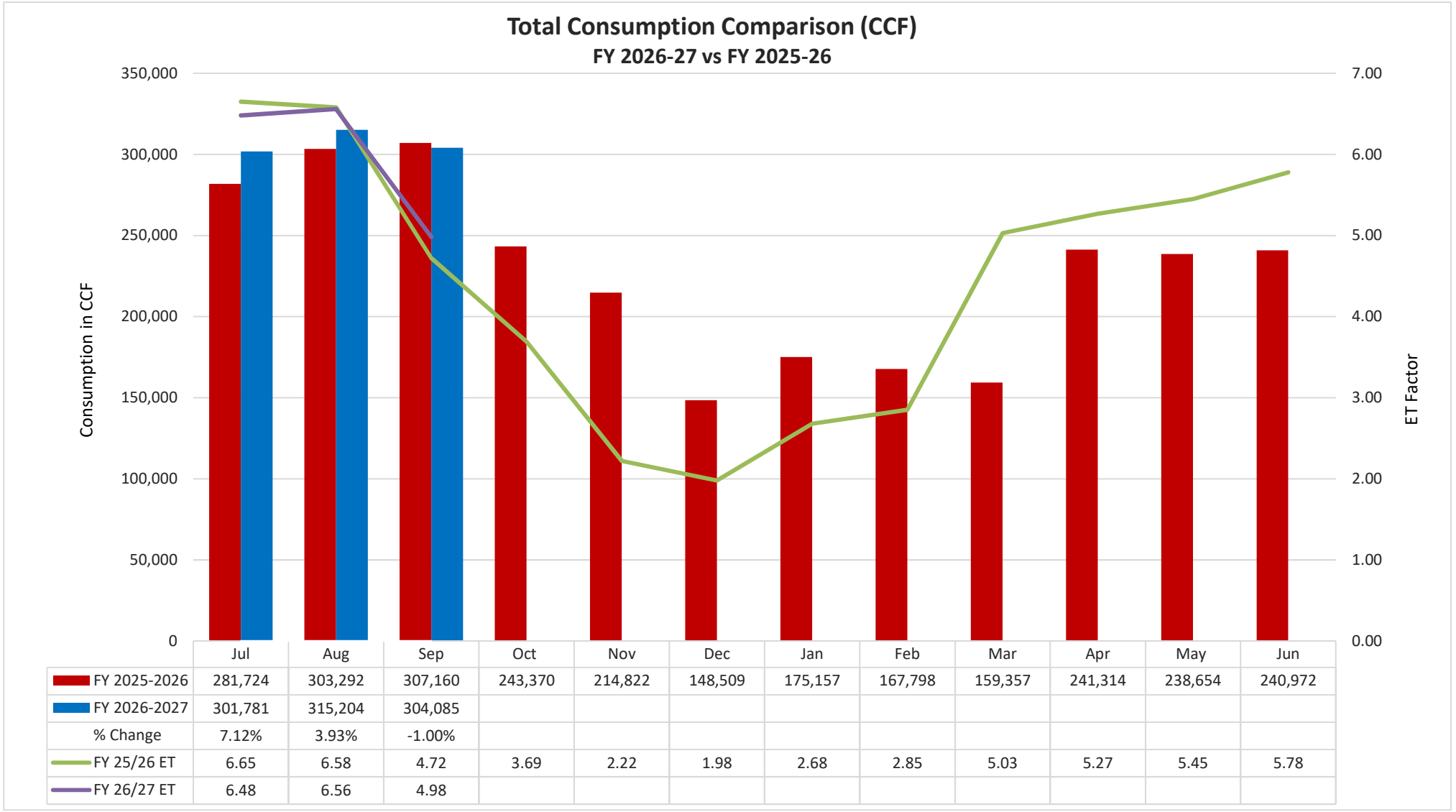


	Total	Third	United	Mutual 50	GRF	LWV Golf Course
	79,721	79,721	63,732	2,316	8,348	14,794
Tier 4	194	194	54	-	23	
Tier 3	722	722	1,134	61	202	
Tier 2	9,694	9,694	29,743	26	3,909	
Tier 1	17,402	17,402	27,840	1,314	-	
RW	51,709	51,709	4,961	915	4,214	14,794

Laguna Woods Village
Year-to-Date Water & RW Sales
September 2026

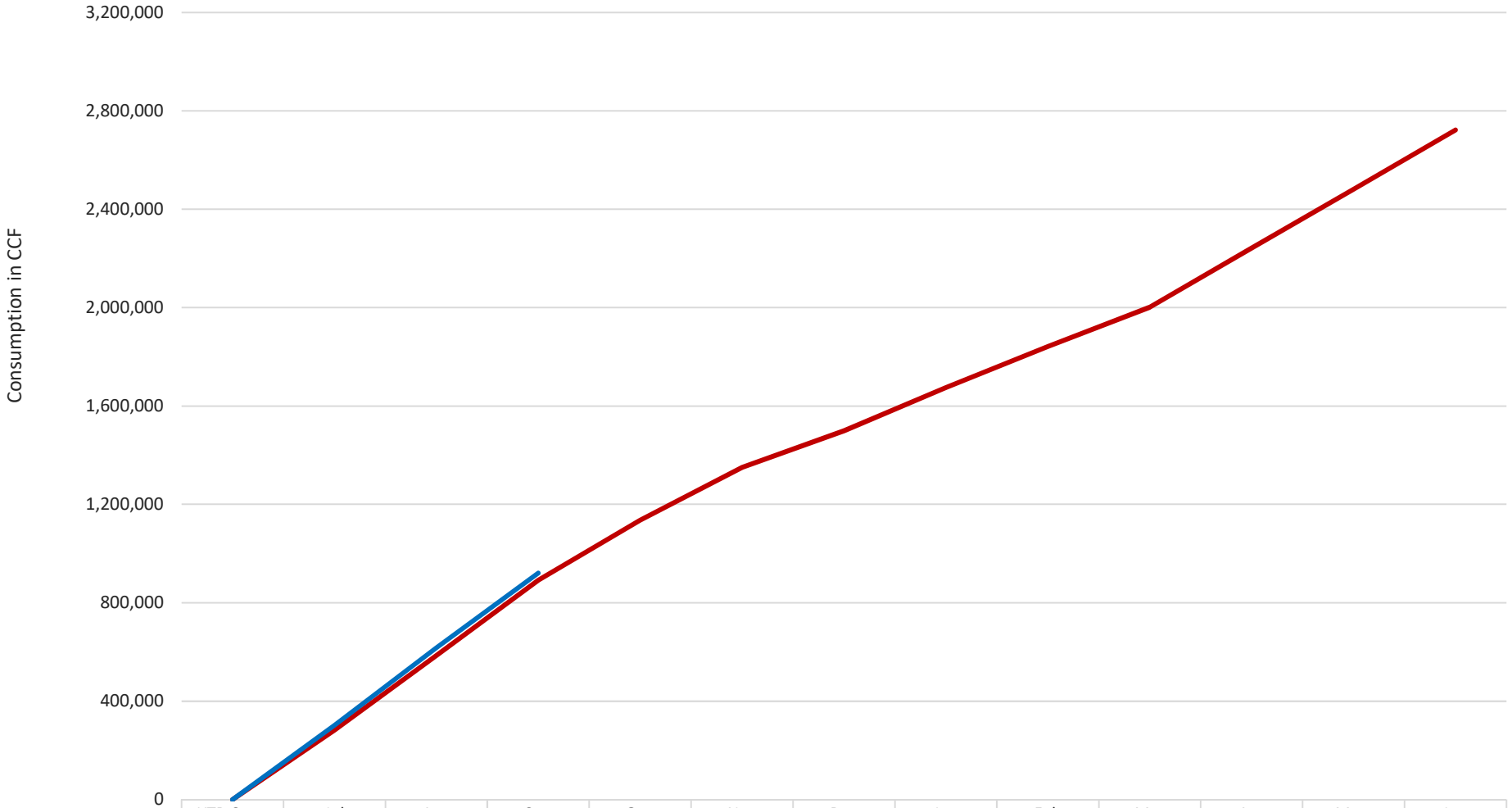


	Total	Third	United	Mutual 50	GRF	LWV Golf Course
	243,157	243,157	196,128	6,737	24,786	54,797
Tier 4	619	619	402	0	194	
Tier 3	2,346	2,346	4,764	98	617	
Tier 2	28,413	28,413	93,865	66	11,562	
Tier 1	54,686	54,686	81,769	4,061	0	
RW	157,093	157,093	15,328	2,512	12,413	54,797



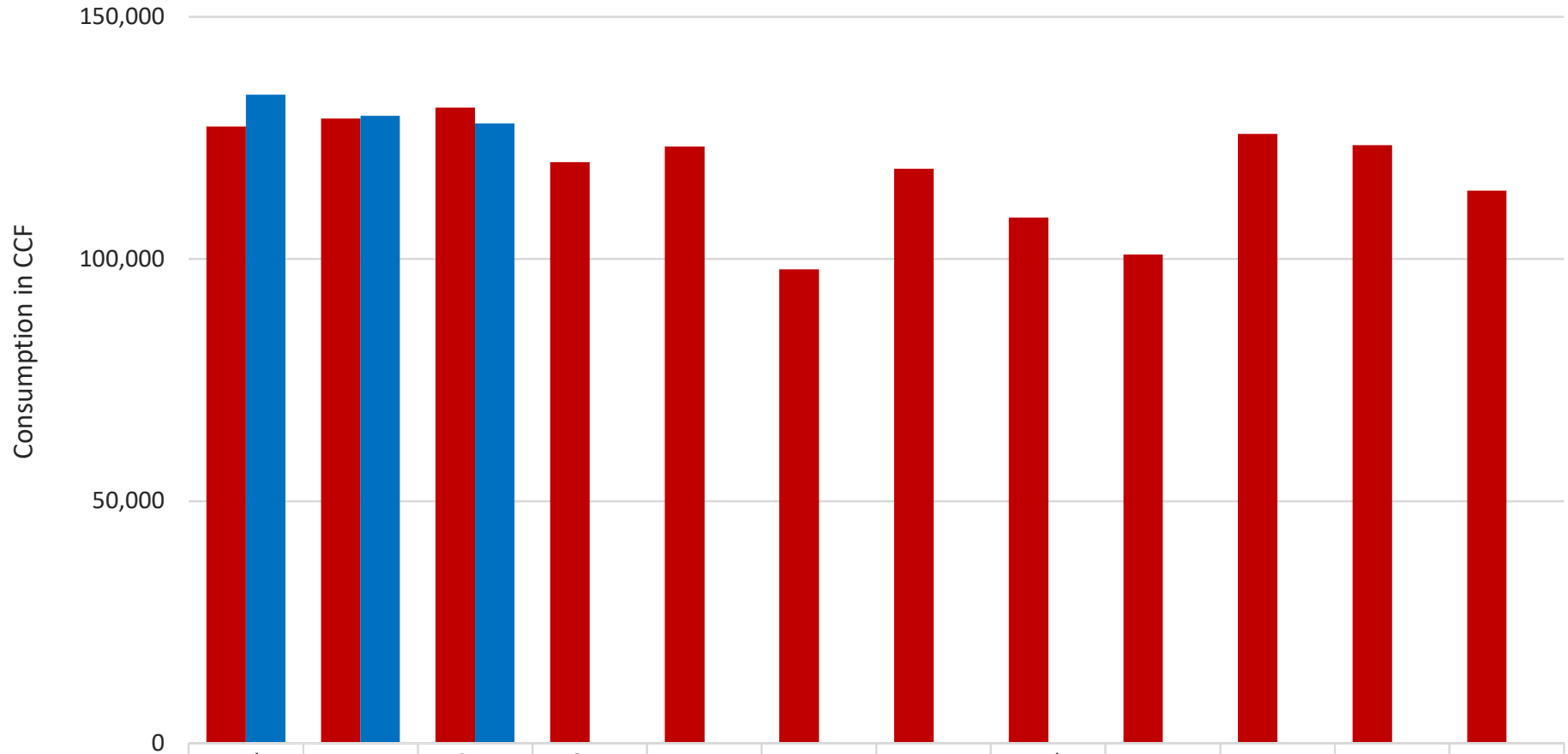
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
FY 2025-2026	281,724	303,292	307,160	243,370	214,822	148,509	175,157	167,798	159,357	241,314	238,654	240,972
FY 2026-2027	301,781	315,204	304,085									
% Change	7.12%	3.93%	-1.00%									
FY 25/26 ET	6.65	6.58	4.72	3.69	2.22	1.98	2.68	2.85	5.03	5.27	5.45	5.78
FY 26/27 ET	6.48	6.56	4.98									

ETWD Fiscal YTD Consumption
FY 2026-27 vs FY 2025-26



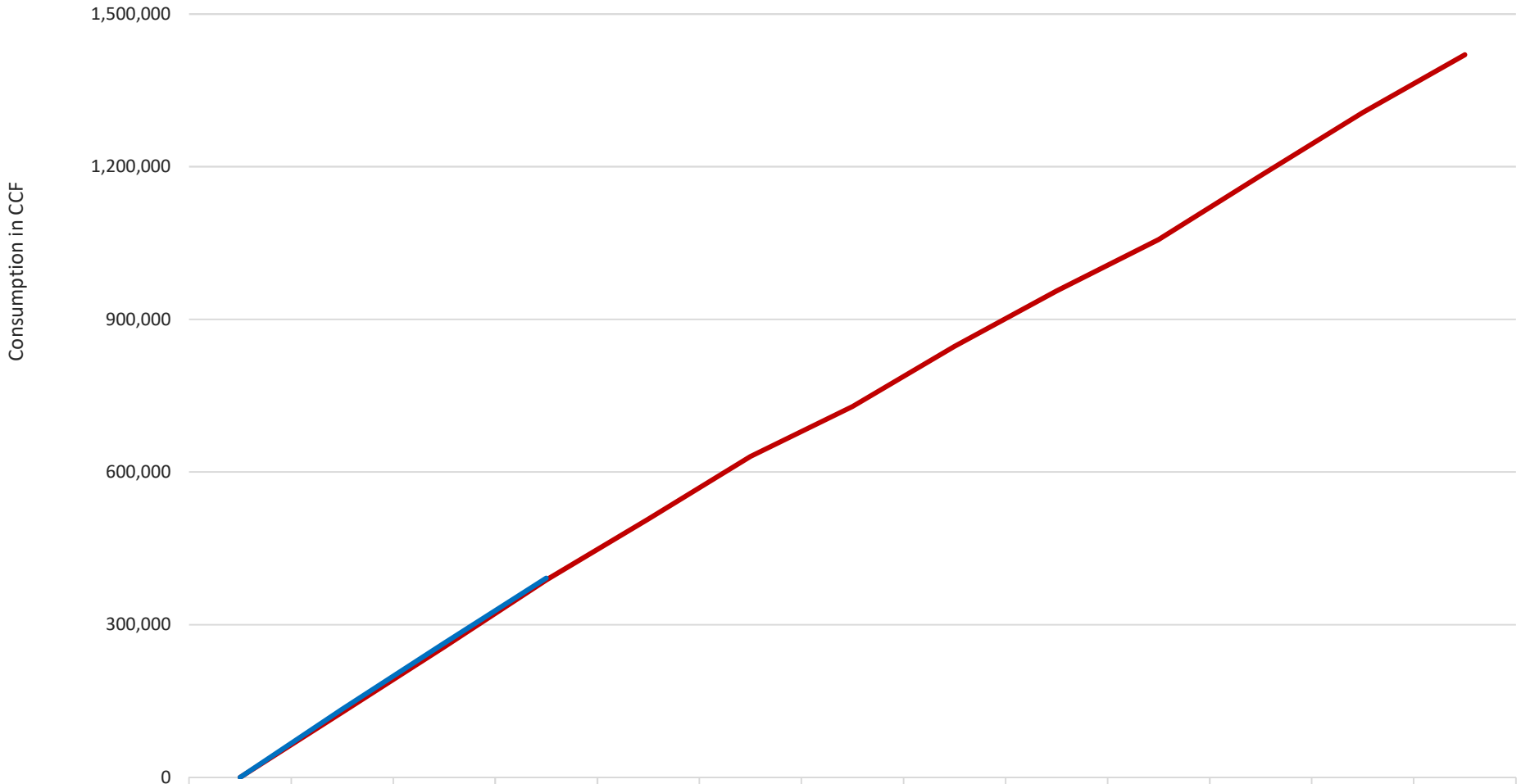
	YTD Start	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2025-2026	0	281,724	585,016	892,176	1,135,546	1,350,368	1,498,877	1,674,034	1,841,832	2,001,189	2,242,503	2,481,157	2,722,129
2026-2027	0	301,781	616,985	921,070									
% Change		7.12%	5.46%	3.24%									

Tier I Consumption



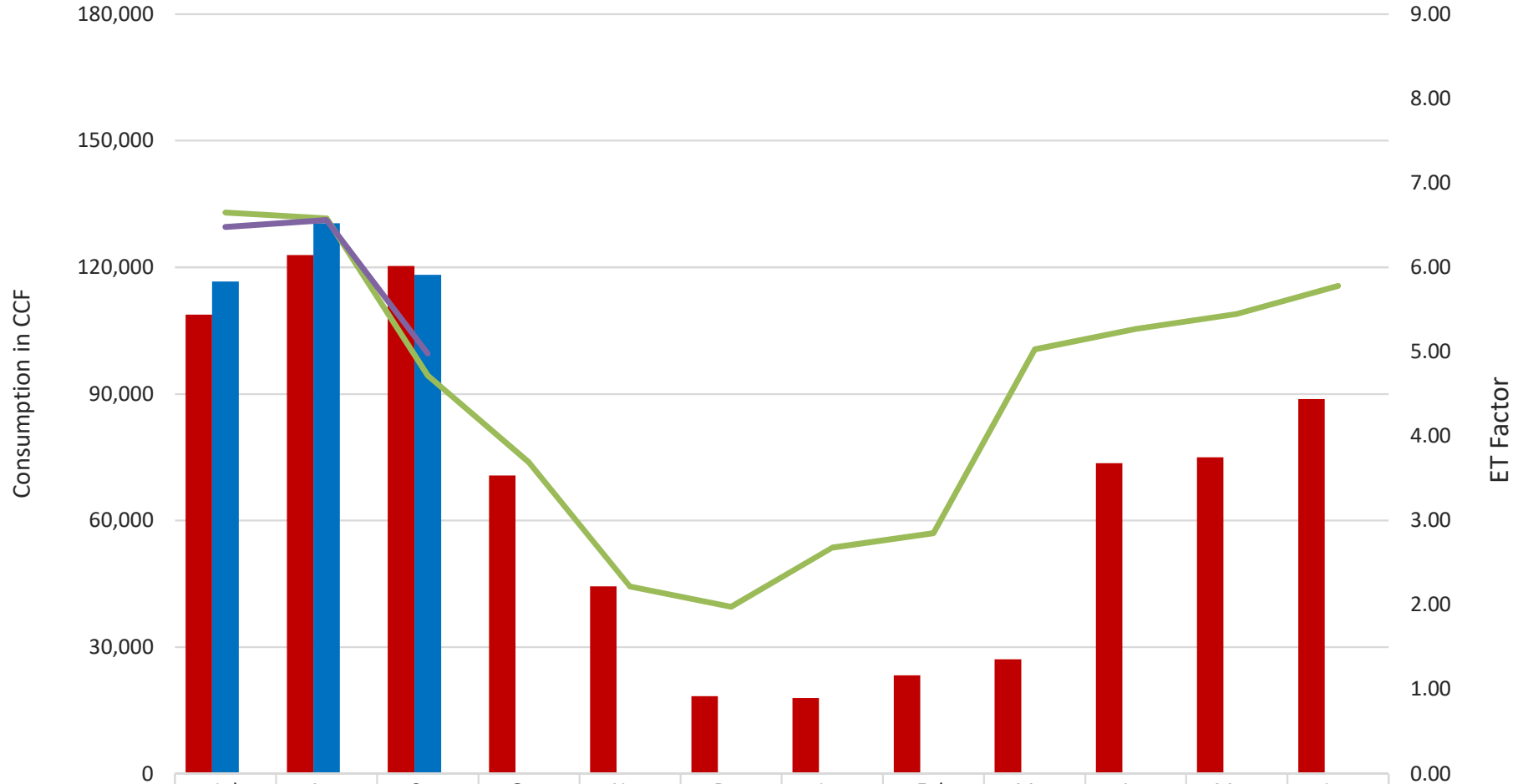
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2025-2026	127,358	128,996	131,302	119,965	123,195	97,859	118,616	108,523	100,899	125,873	123,511	114,116
2026-2027	133,939	129,537	127,988									
% Change	5.17%	0.42%	-2.52%									

Tier I Fiscal YTD Consumption



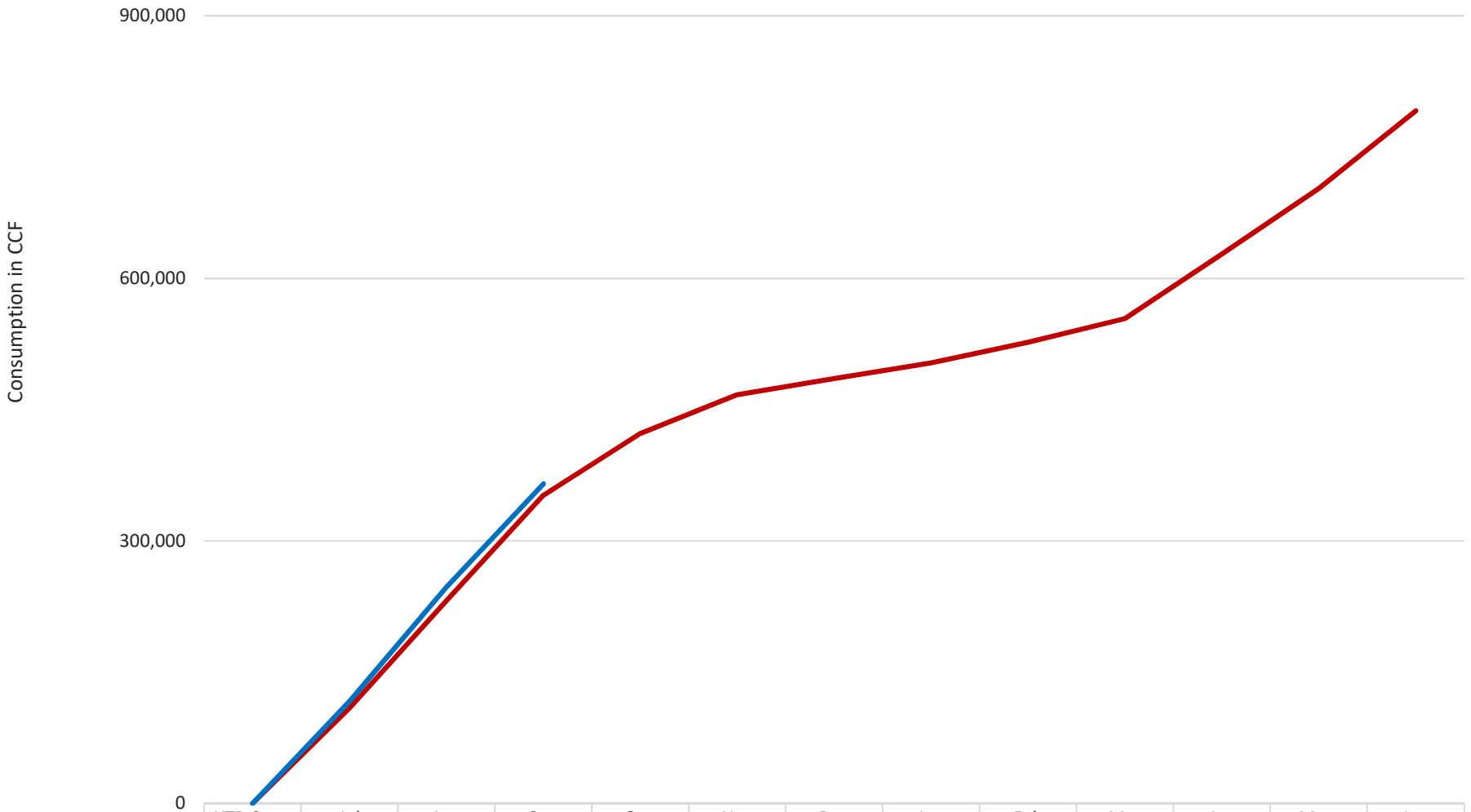
	YTD Start	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2025-2026	0	127,358	256,354	387,656	507,621	630,816	728,675	847,291	955,814	1,056,713	1,182,586	1,306,097	1,420,213
2026-2027	0	133,939	263,476	391,464									
% Change		5.17%	2.78%	0.98%									

Tier II Consumption



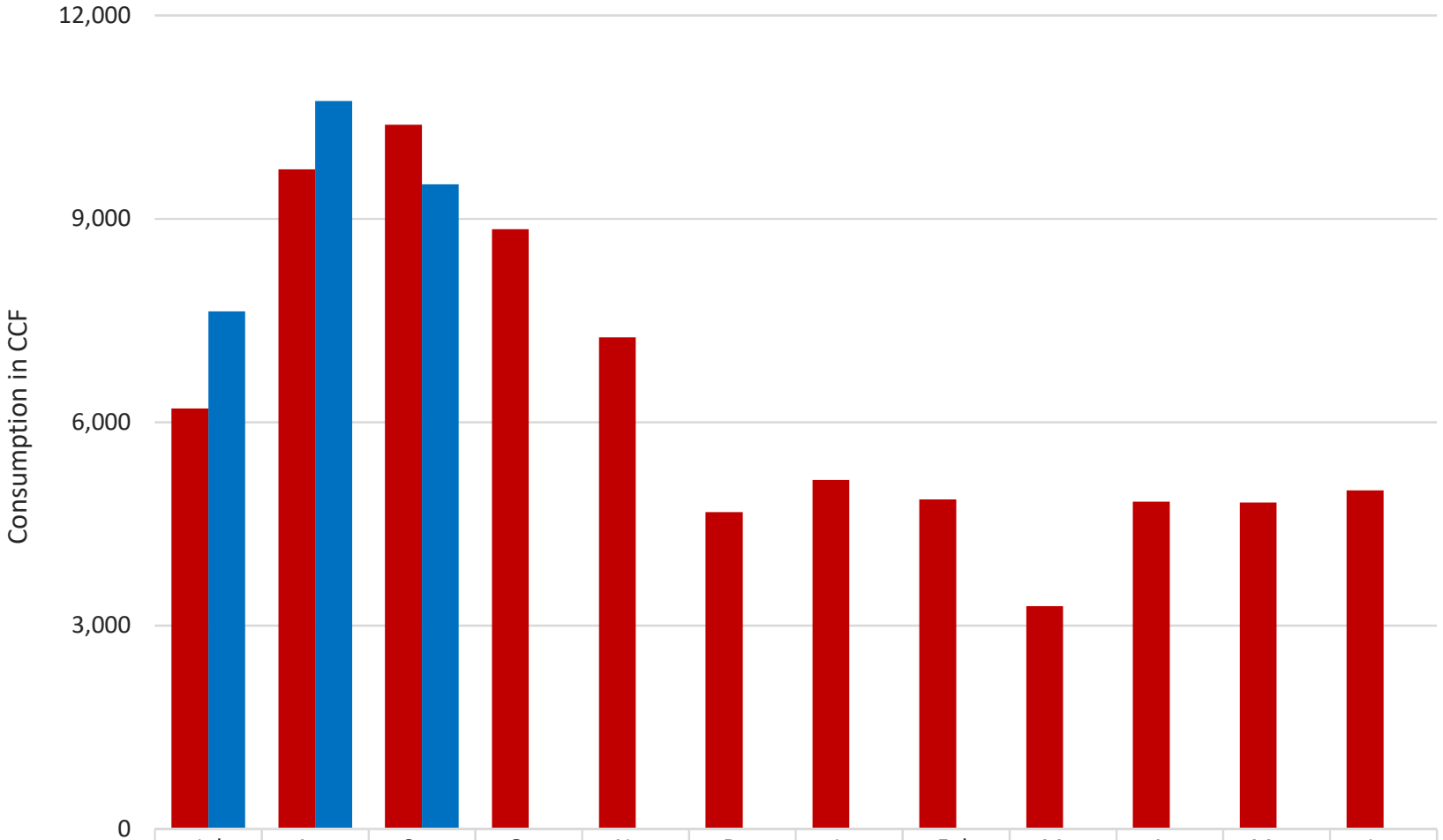
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2025-2026	108,802	122,934	120,334	70,731	44,415	18,409	17,923	23,389	27,144	73,604	75,011	88,806
2026-2027	116,653	130,480	118,265									
% Change	7.22%	6.14%	-1.72%									
25/26 ET	6.65	6.58	4.72	3.69	2.22	1.98	2.68	2.85	5.03	5.27	5.45	5.78
26/27 ET	6.48	6.56	4.98									

Tier II Fiscal YTD Consumption



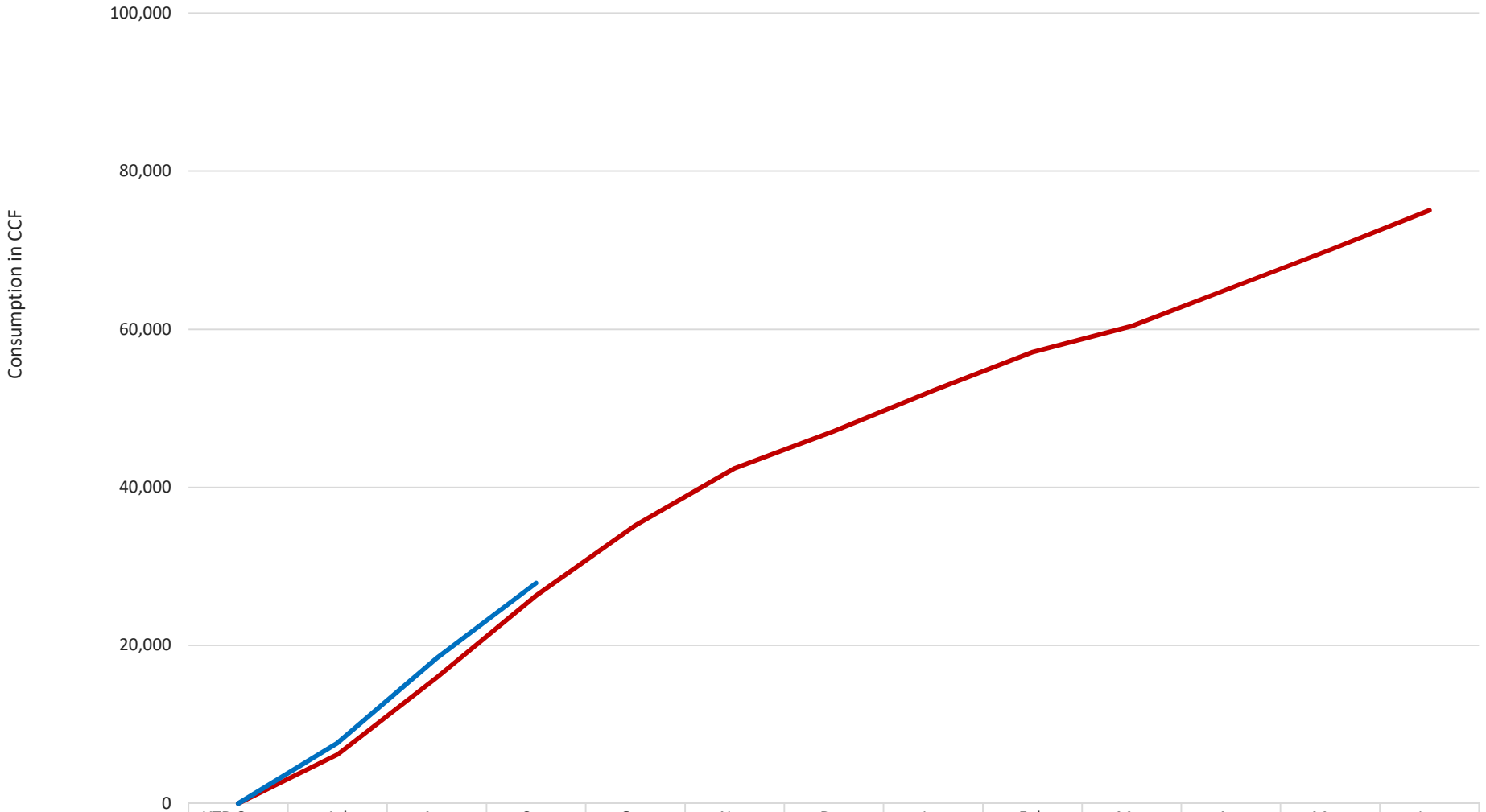
	YTD Start	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2025-2026	0	108,802	231,736	352,070	422,801	467,216	485,625	503,548	526,937	554,081	627,685	702,696	791,502
2026-2027	0	116,653	247,133	365,398									
% Change		7.22%	6.64%	3.79%									

Tier III Consumption



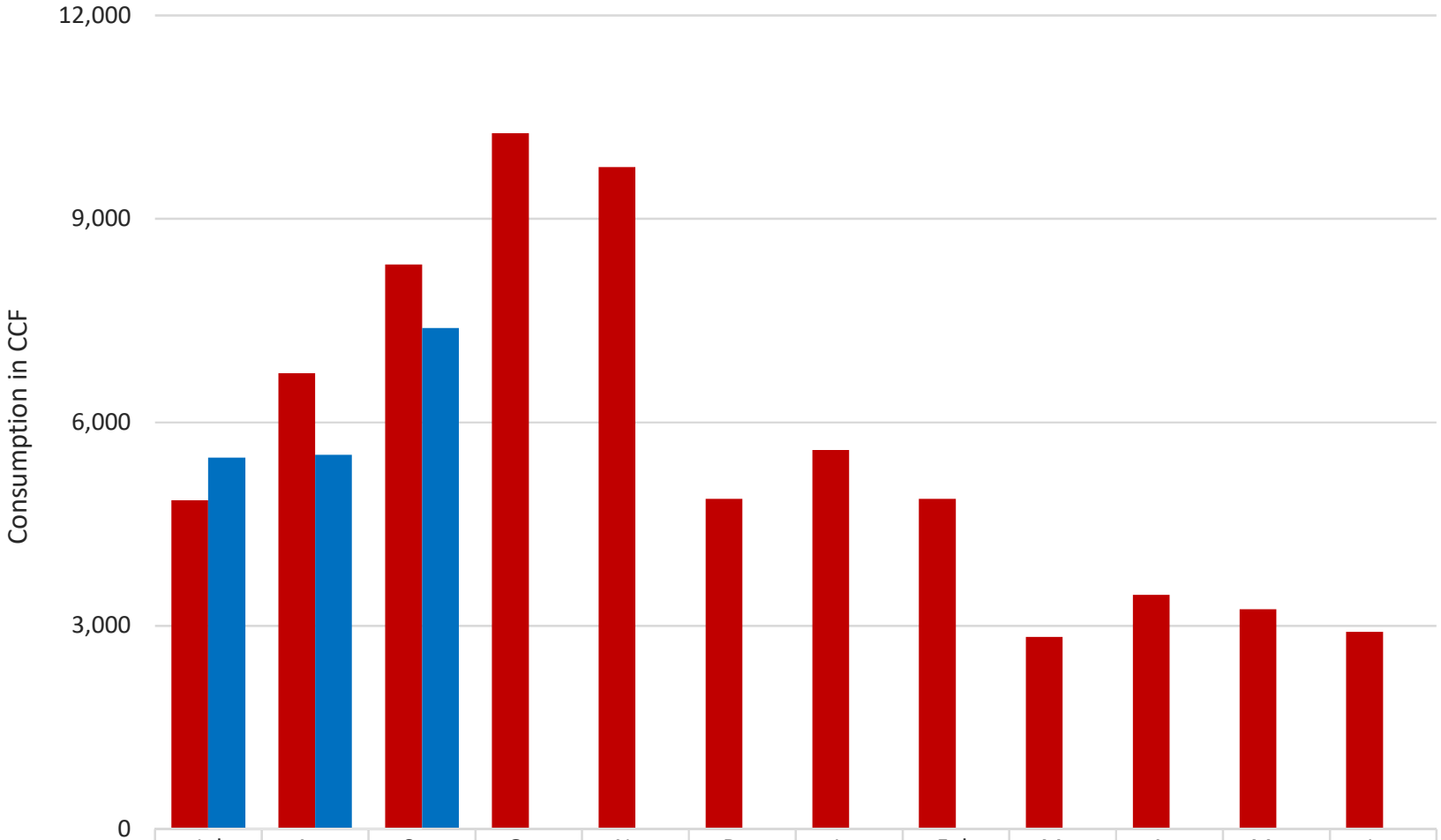
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2025-2026	6,207	9,731	10,387	8,848	7,255	4,673	5,149	4,866	3,285	4,829	4,818	4,999
2026-2027	7,639	10,742	9,514									
% Change	23.07%	10.39%	-8.40%									

Tier III Fiscal YTD Consumption



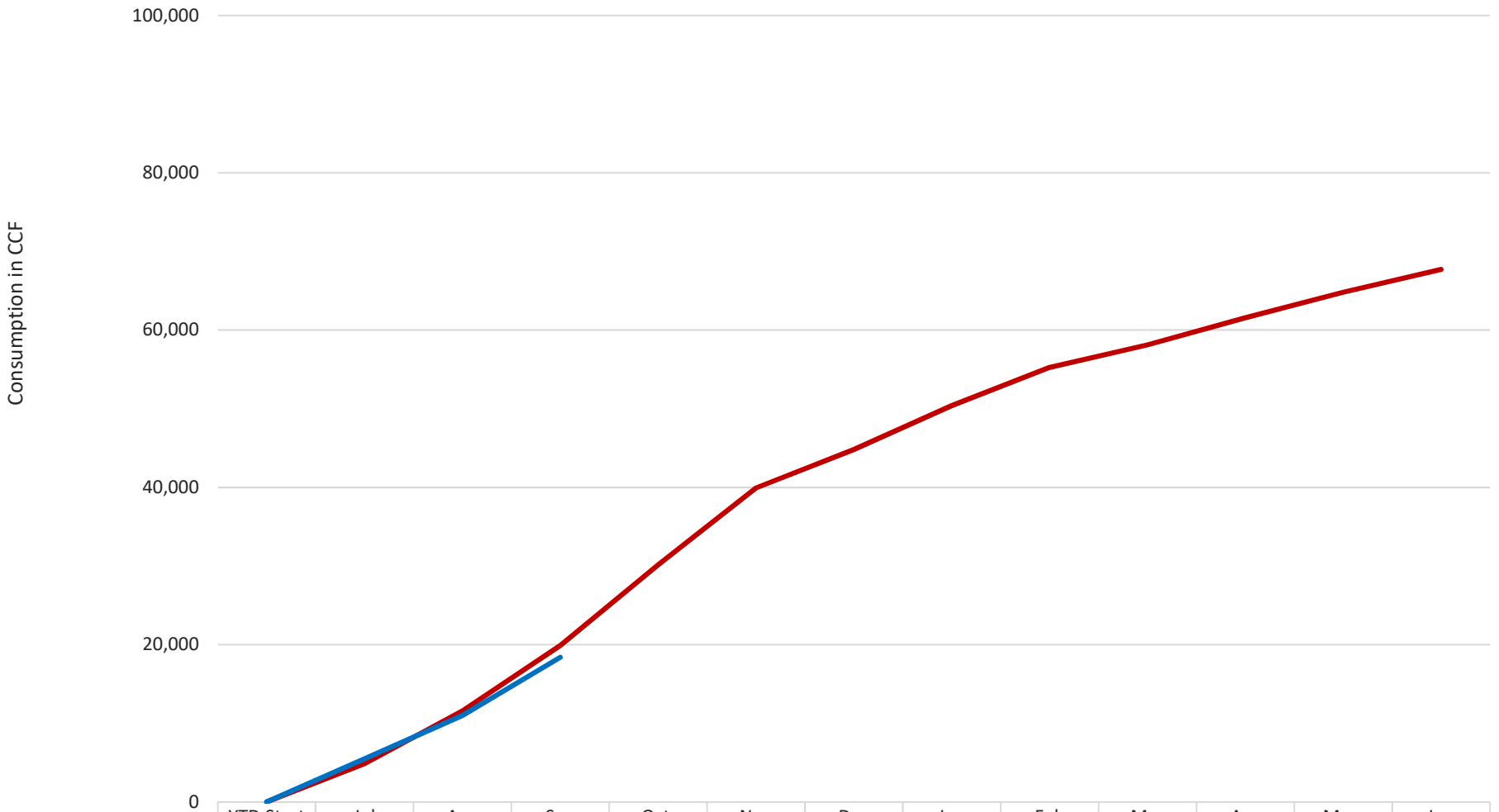
	YTD Start	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2025-2026	0	6,207	15,938	26,325	35,173	42,428	47,101	52,250	57,116	60,401	65,230	70,048	75,047
2026-2027	0	7,639	18,381	27,895									
% Change		23.07%	15.33%	5.96%									

Tier IV Consumption



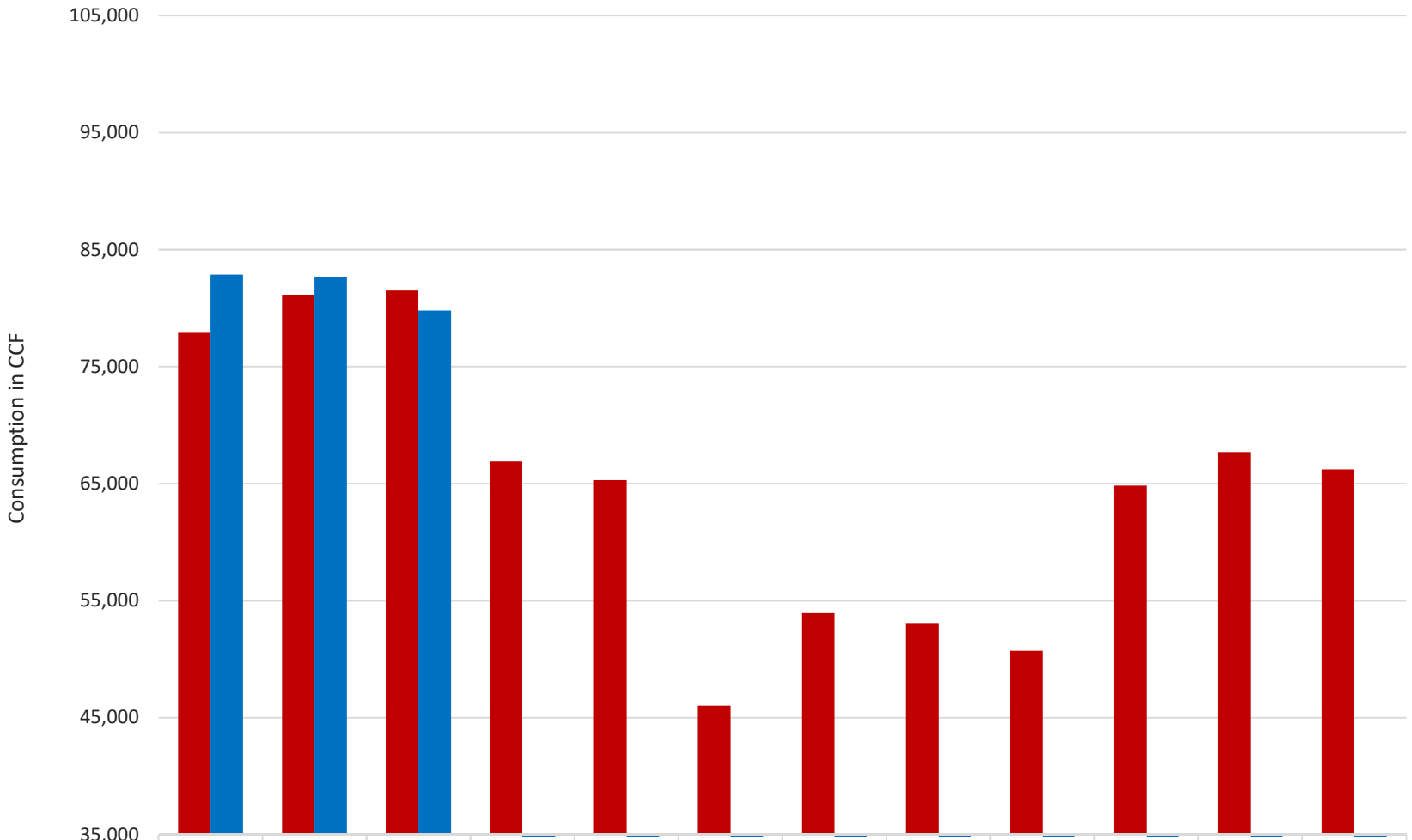
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2025-2026	4,851	6,723	8,328	10,265	9,766	4,871	5,594	4,872	2,836	3,452	3,245	2,911
2026-2027	5,482	5,521	7,391									
% Change	13.01%	-17.88%	-11.25%									

Tier IV Fiscal YTD Consumption



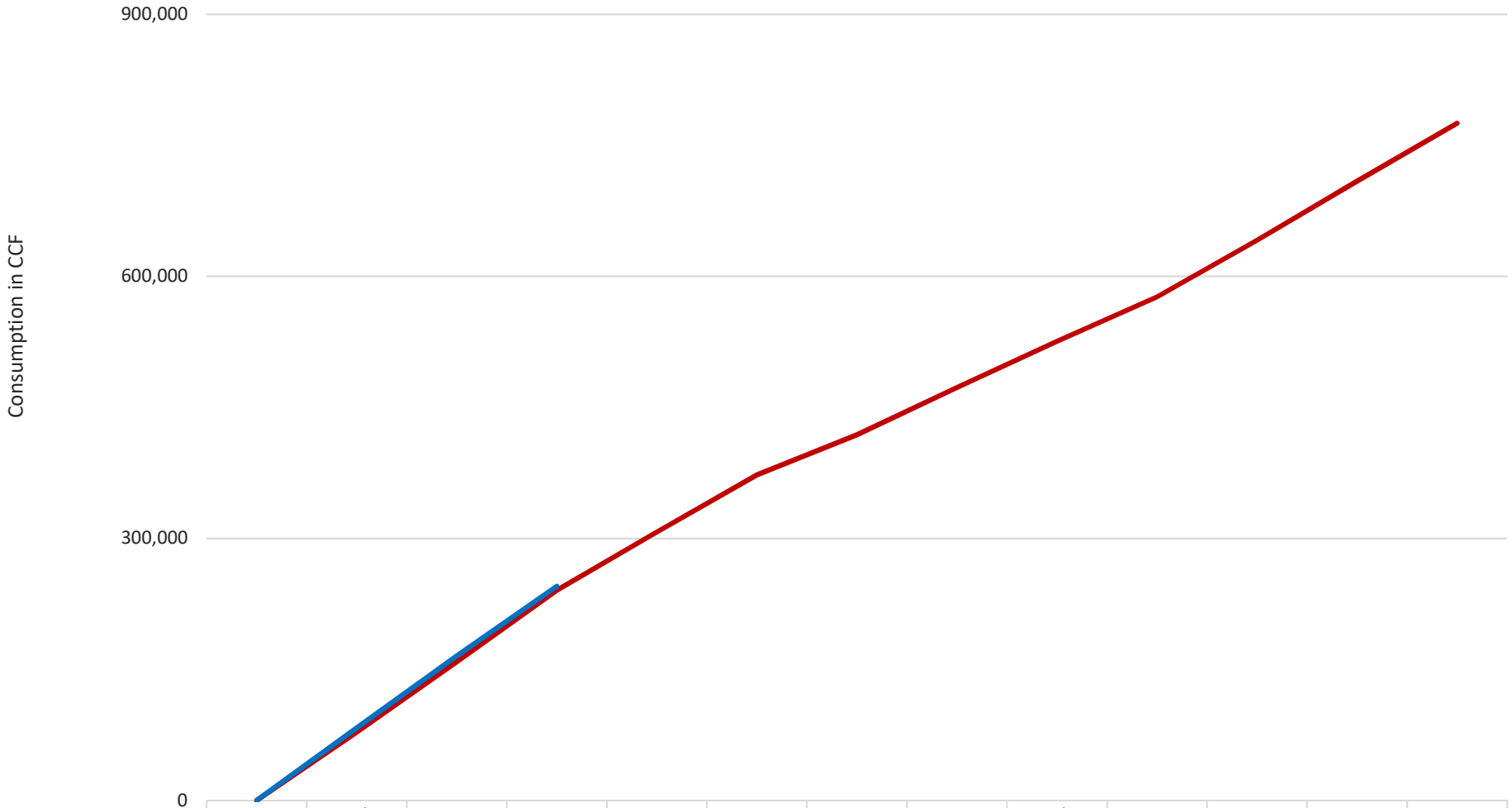
	YTD Start	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2025-2026	0	4,851	11,574	19,902	30,167	39,933	44,804	50,398	55,270	58,106	61,558	64,803	67,714
2026-2027	0	5,482	11,003	18,394									
% Change		13.01%	-4.93%	-7.58%									

Single Family Residents Consumption



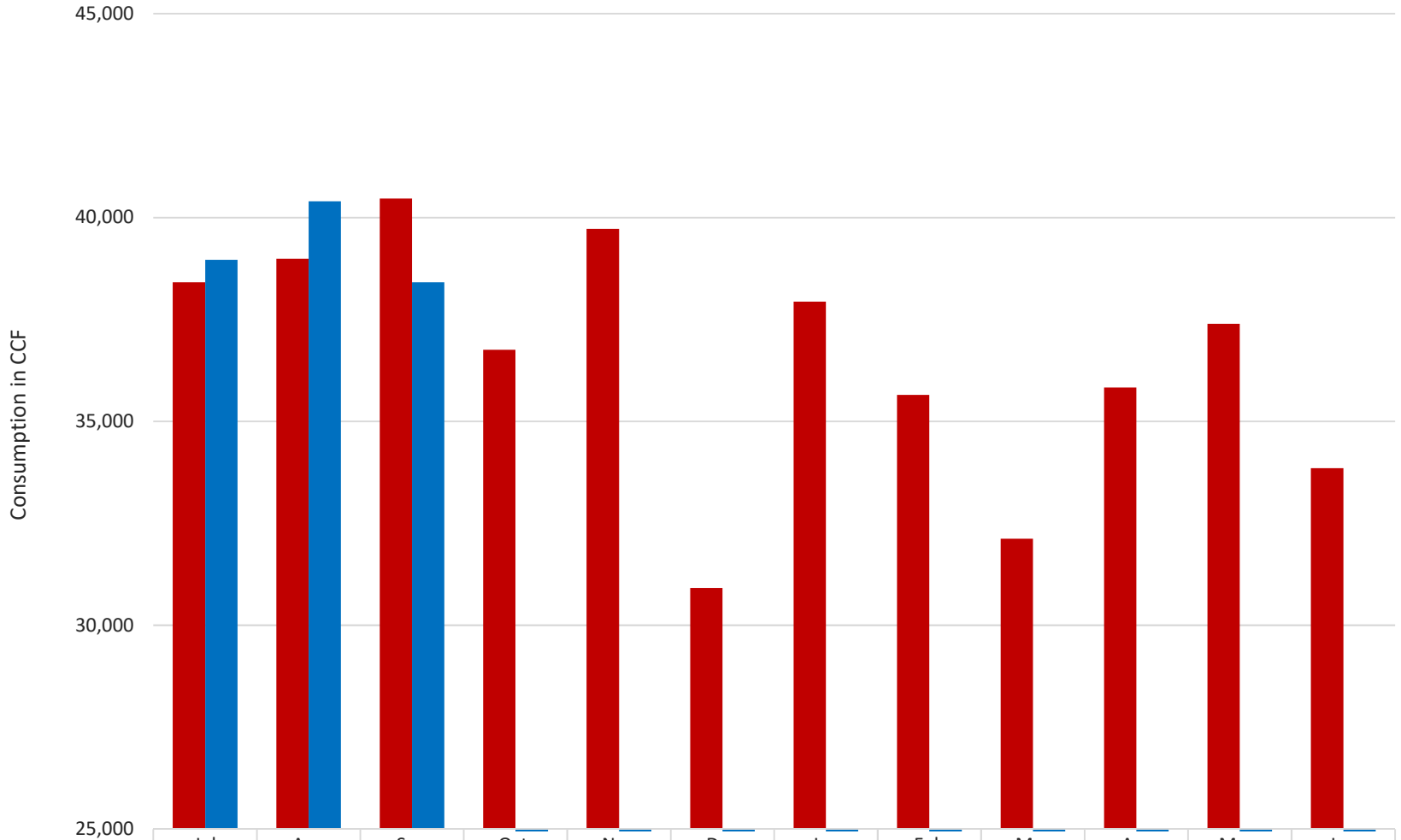
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2025-2026	77,907	81,112	81,491	66,913	65,316	46,039	53,951	53,104	50,719	64,824	67,703	66,220
2026-2027	82,877	82,651	79,778									
% Change	6.38%	1.90%	-2.10%									

Single Family Residents YTD Consumption



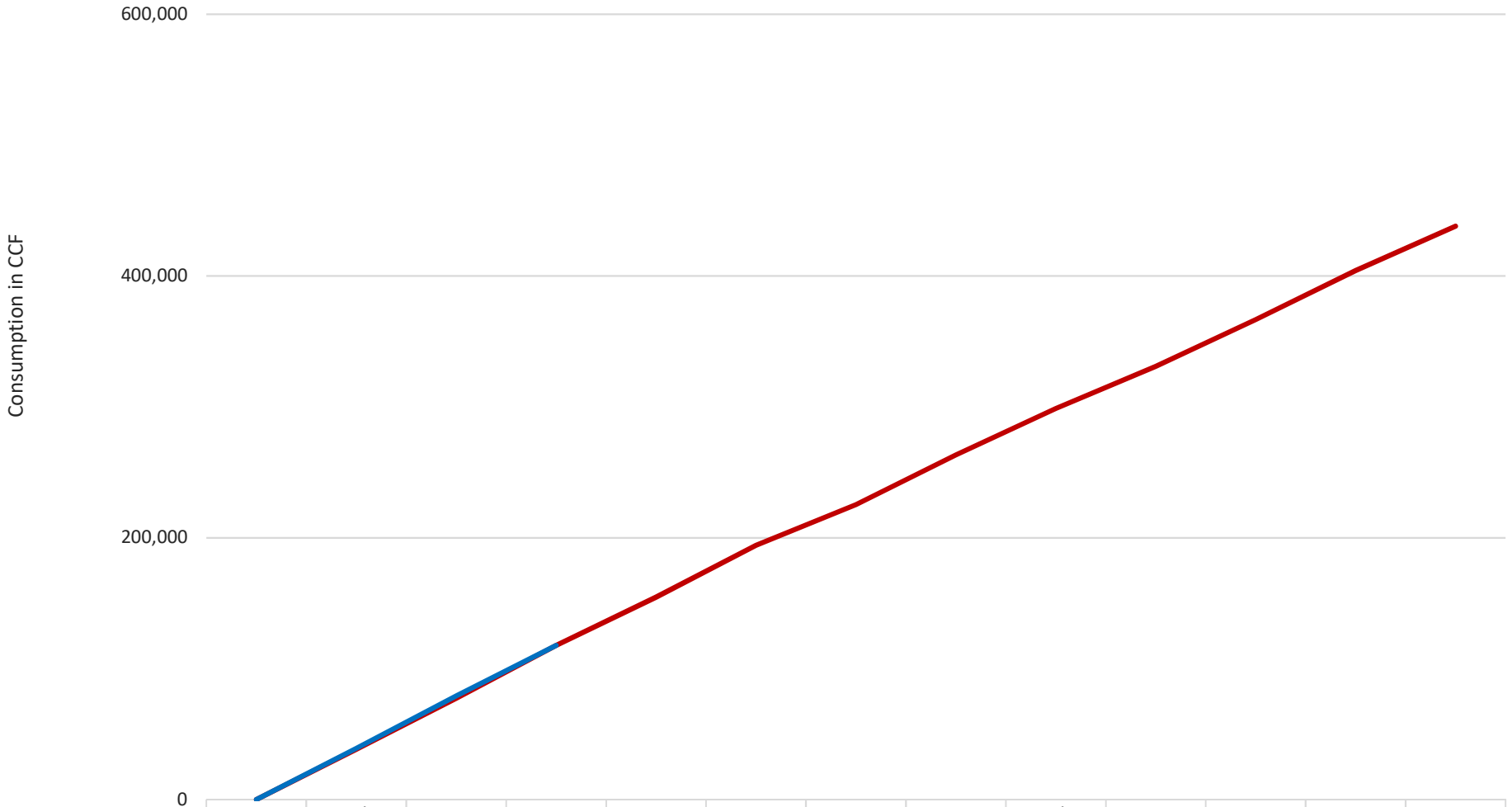
	YTD Start	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2025-2026	0	77,907	159,019	240,510	307,423	372,739	418,778	472,729	525,833	576,552	641,376	709,079	775,299
2026-2027	0	82,877	165,528	245,306									
% Change		6.38%	4.09%	1.99%									

Multi Family Residents Consumption



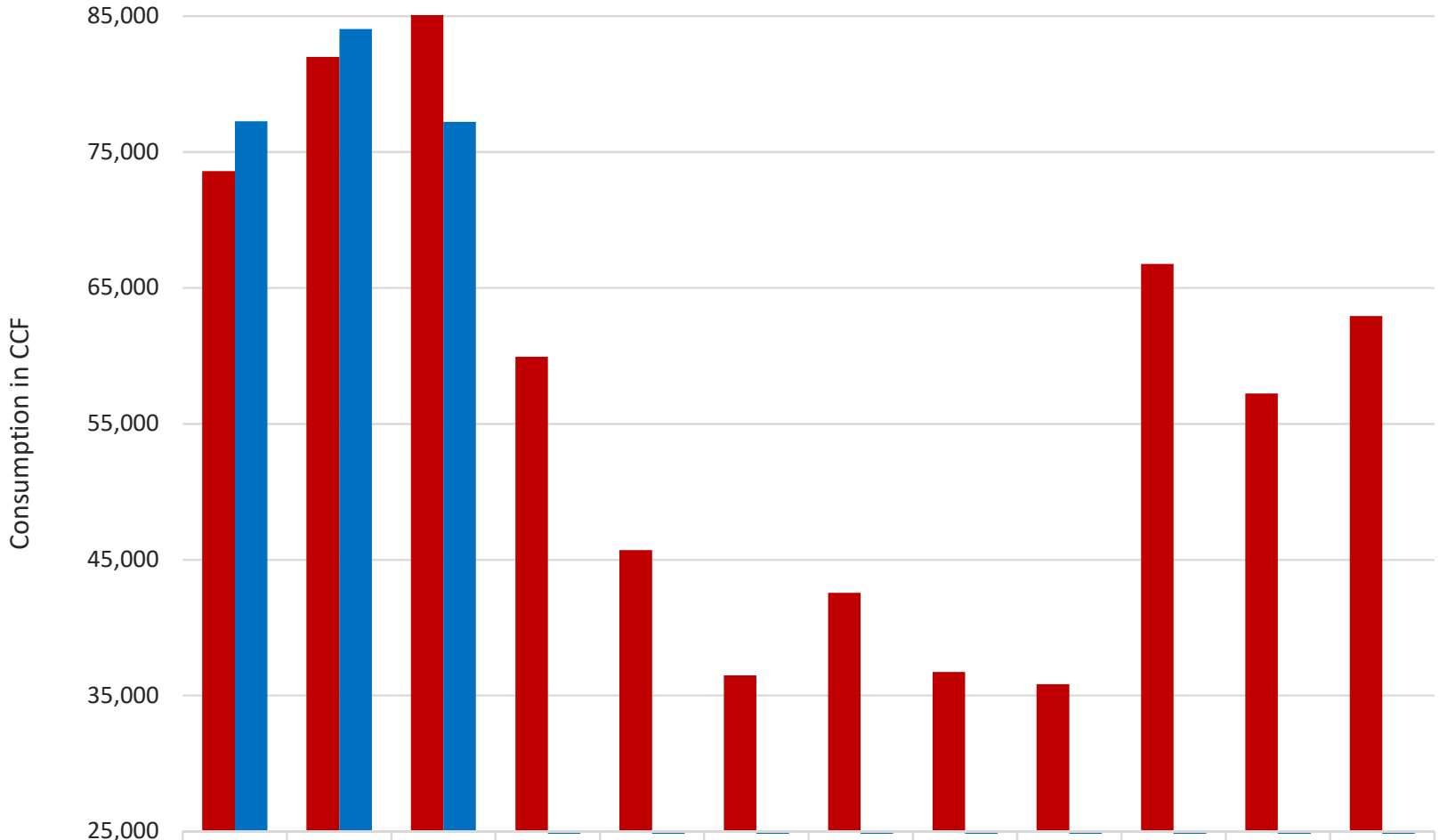
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2025-2026	38,413	38,991	40,467	36,756	39,720	30,918	37,934	35,646	32,126	35,837	37,394	33,858
2026-2027	38,961	40,400	38,415									
% Change	1.43%	3.61%	-5.07%									

Multi Family Residents YTD Consumption



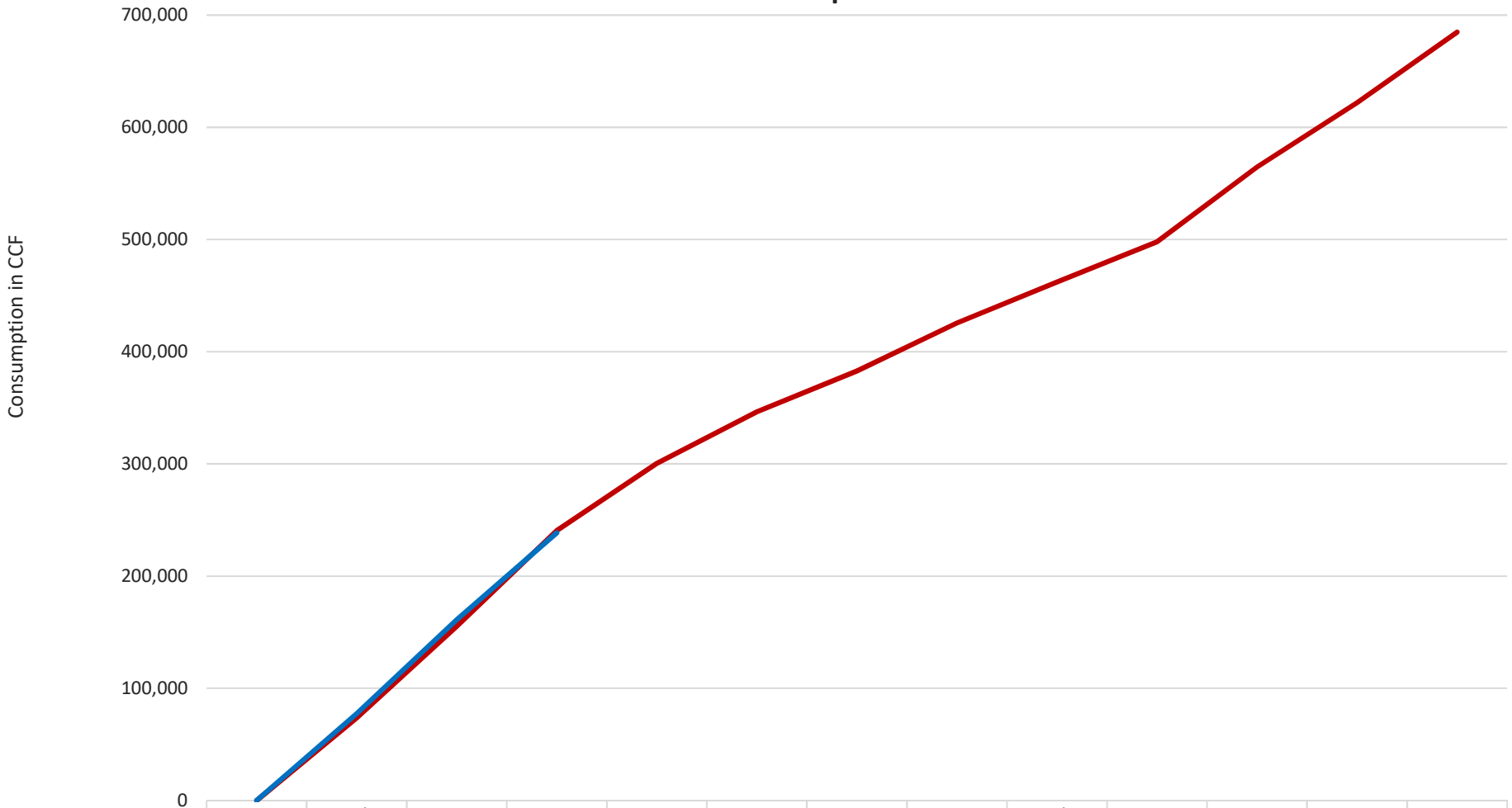
	YTD Start	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2025-2026	0	38,413	77,404	117,871	154,627	194,347	225,265	263,199	298,845	330,971	366,808	404,202	438,060
2026-2027	0	38,961	79,361	117,776									
% Change		1.43%	2.53%	-0.08%									

Laguna Woods Village Consumption (Excluding Dedicated Irrigation)



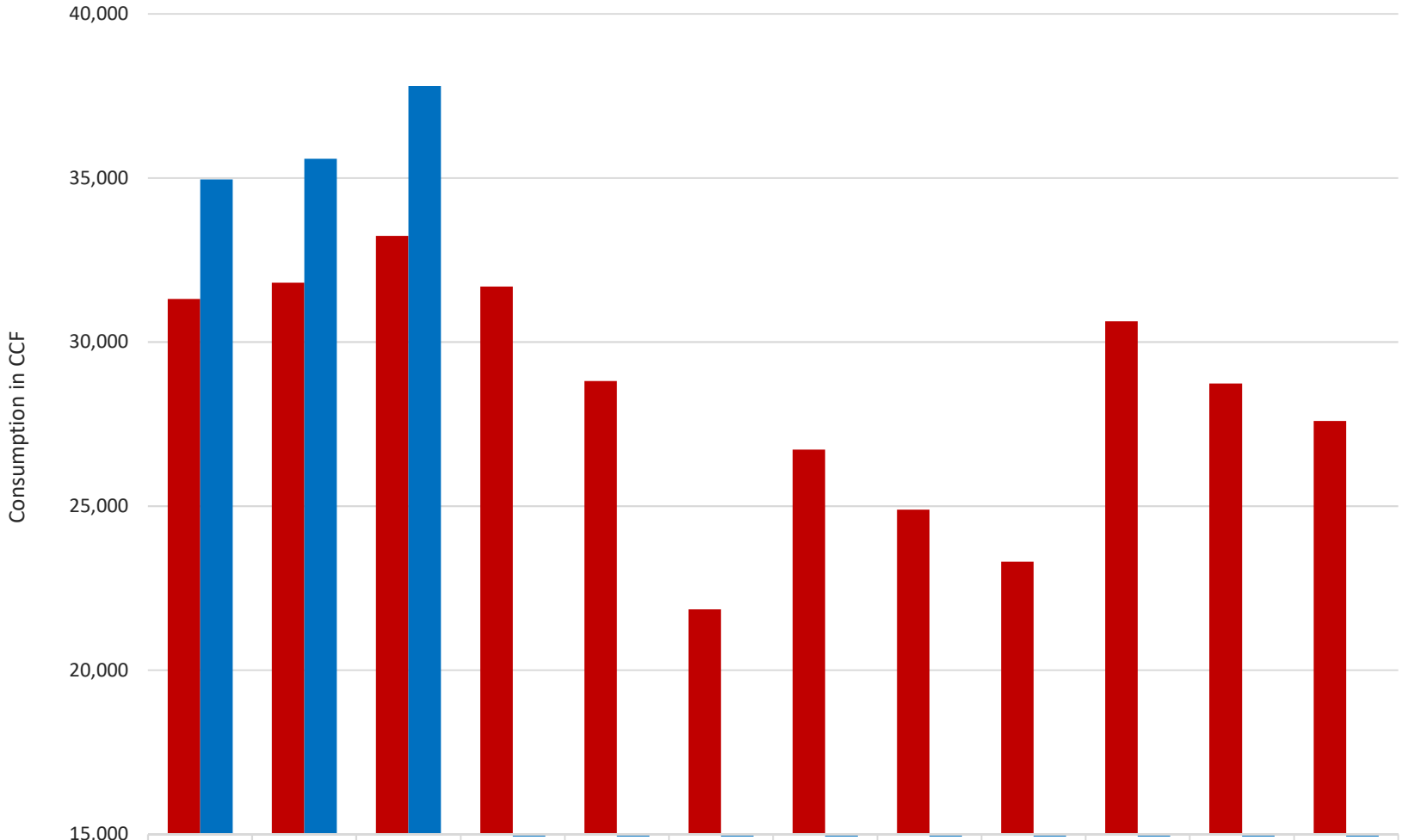
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2025-2026	73,586	82,006	85,095	59,933	45,731	36,485	42,560	36,744	35,843	66,776	57,229	62,945
2026-2027	77,286	84,054	77,234									
% Change	5.03%	2.50%	-9.24%									

Laguna Woods Village (Excluding Dedicated Irrigation)
YTD Consumption



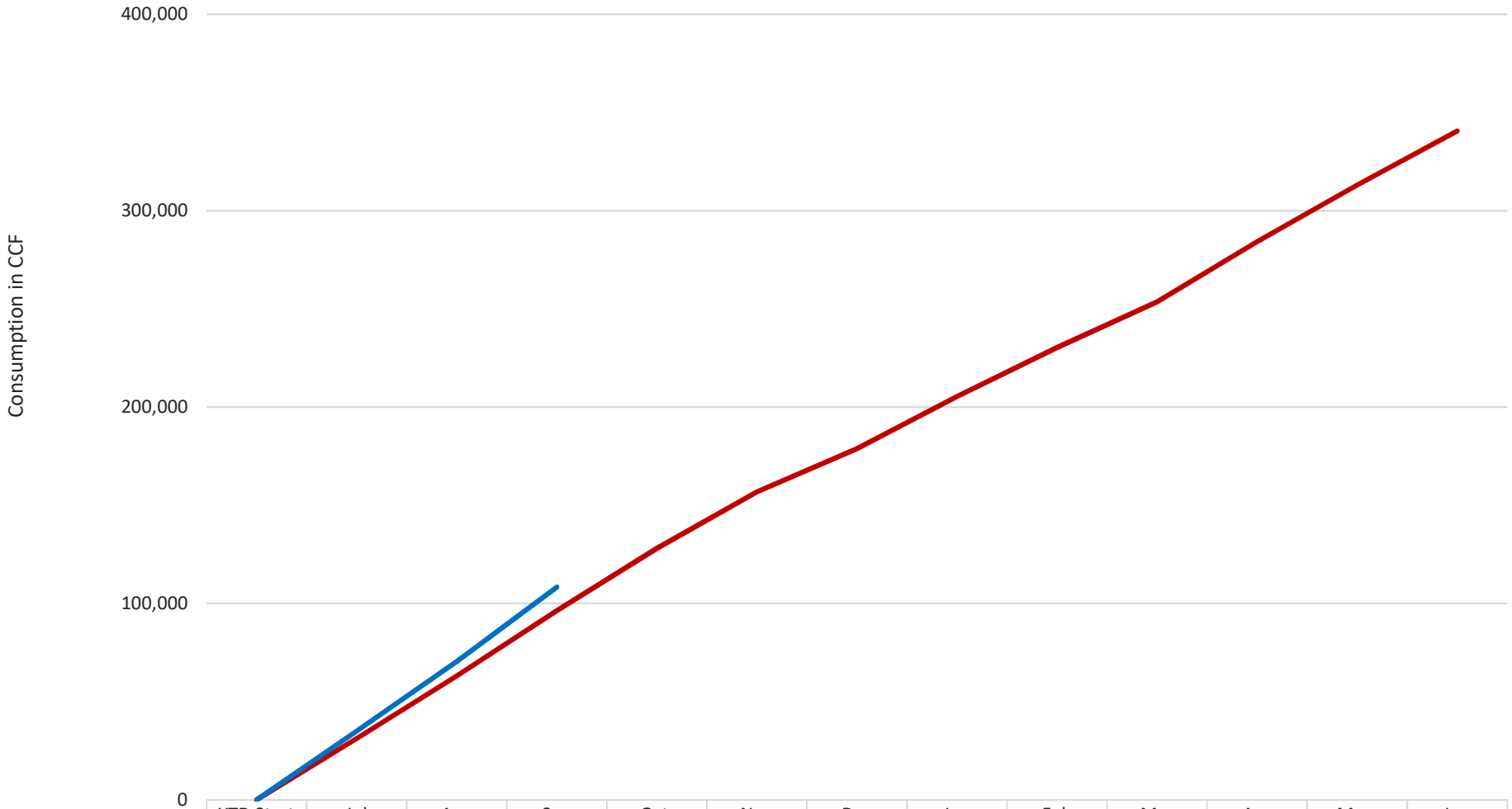
	YTD Start	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2025-2026	0	73,586	155,592	240,687	300,620	346,351	382,836	425,396	462,140	497,983	564,759	621,988	684,933
2026-2027	0	77,286	161,340	238,574									
% Change		5.03%	3.69%	-0.88%									

Commercial Consumption



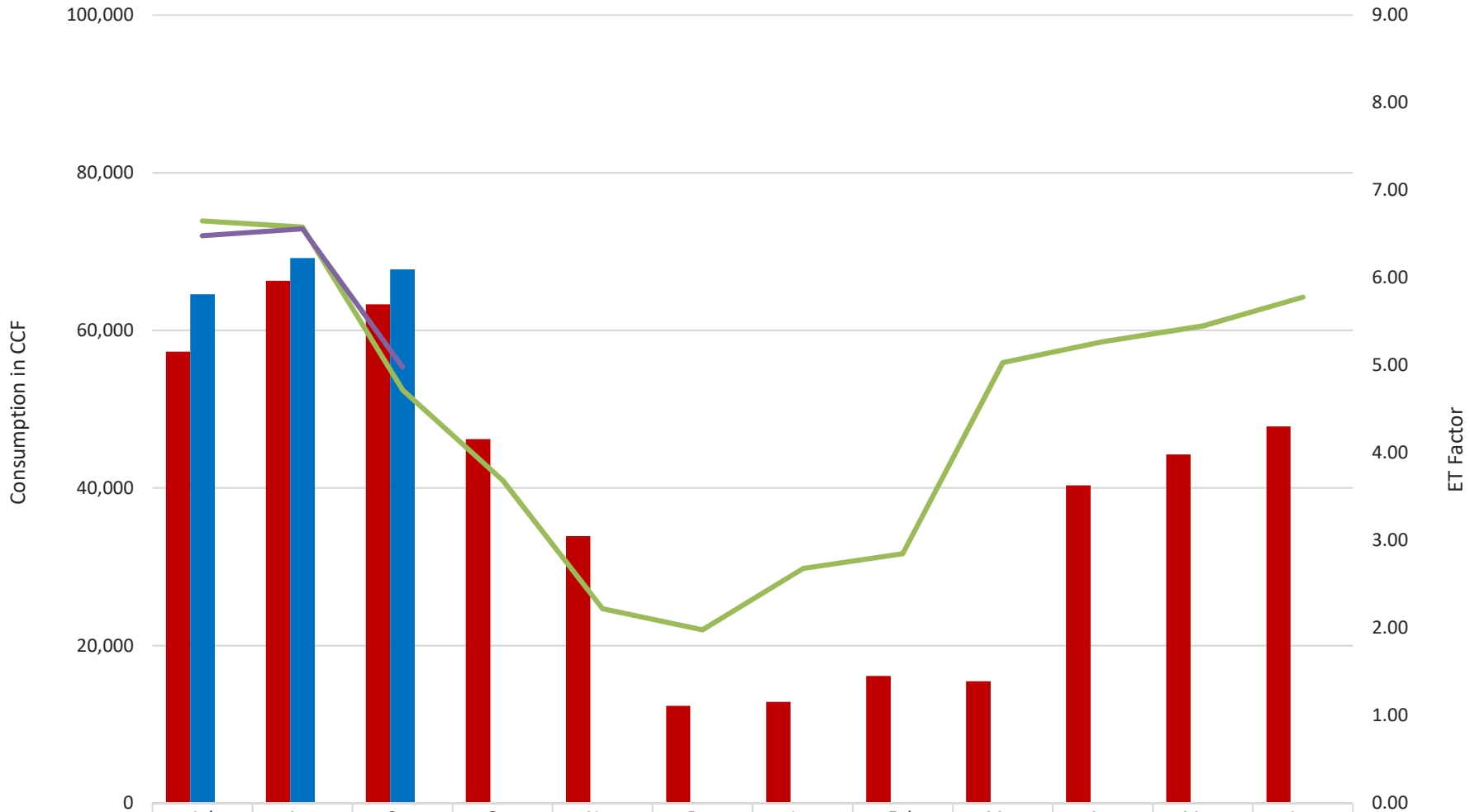
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2025-2026	31,308	31,814	33,231	31,690	28,815	21,852	26,728	24,895	23,314	30,637	28,746	27,592
2026-2027	34,955	35,583	37,799									
% Change	11.65%	11.85%	13.75%									

Commercial YTD Consumption



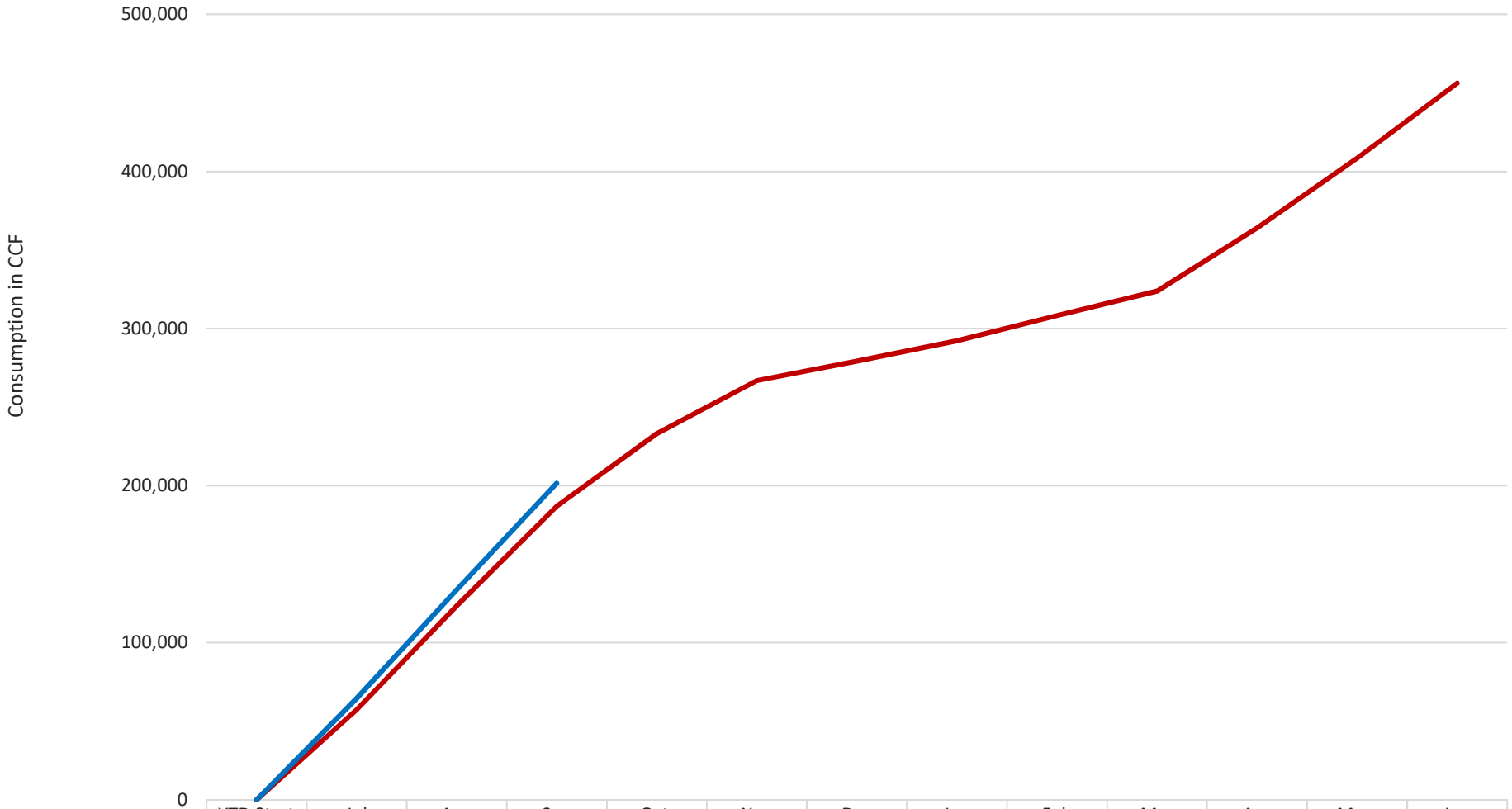
	YTD Start	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2025-2026	0	31,308	63,122	96,353	128,043	156,858	178,710	205,438	230,333	253,647	284,284	313,030	340,622
2026-2027	0	34,955	70,538	108,337									
% Change		11.65%	11.75%	12.44%									

Dedicated Irrigation Consumption (including LWV)



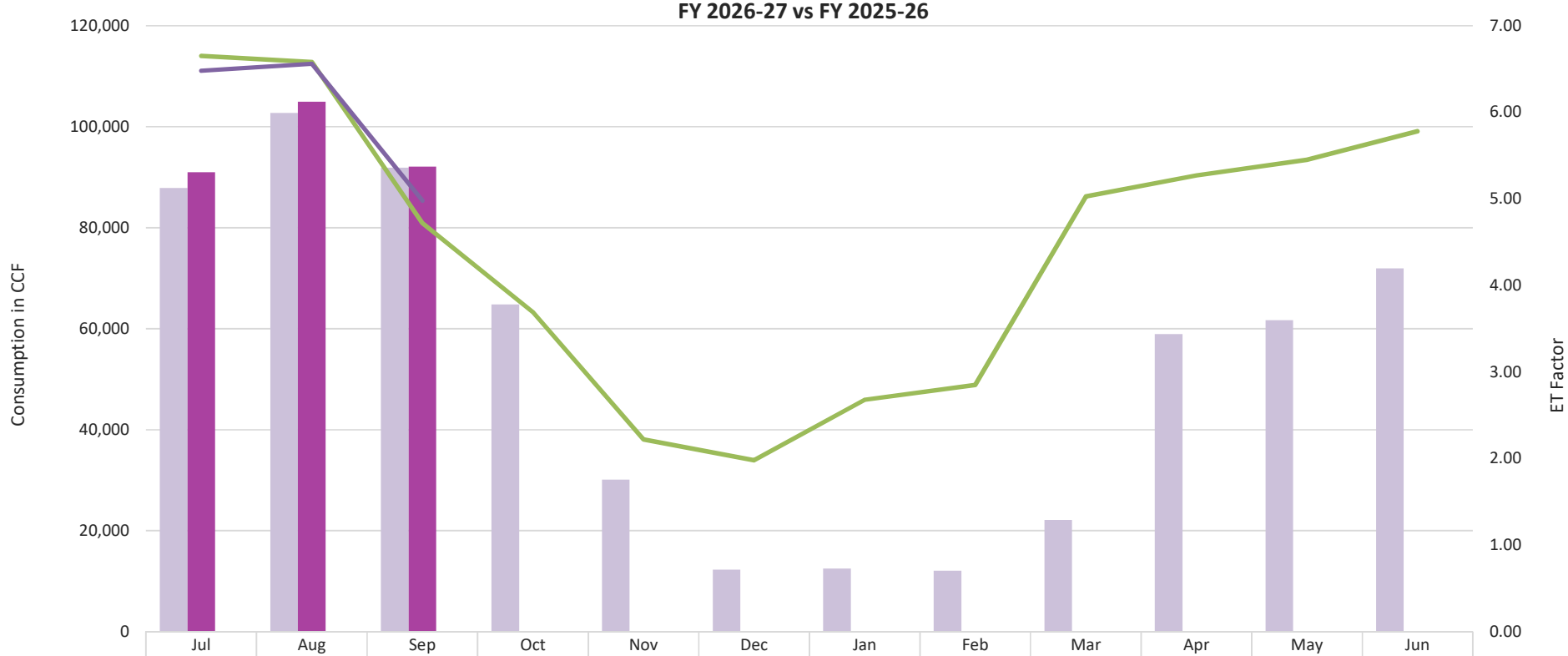
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2025-2026	57,312	66,275	63,298	46,207	33,864	12,370	12,837	16,156	15,476	40,321	44,259	47,809
2026-2027	64,589	69,175	67,731									
% Change	12.70%	4.38%	7.00%									
25/26 ET	6.65	6.58	4.72	3.69	2.22	1.98	2.68	2.85	5.03	5.27	5.45	5.78
26/27 ET	6.48	6.56	4.98									

Dedicated Irrigation Consumption (including LWV)
YTD Consumption



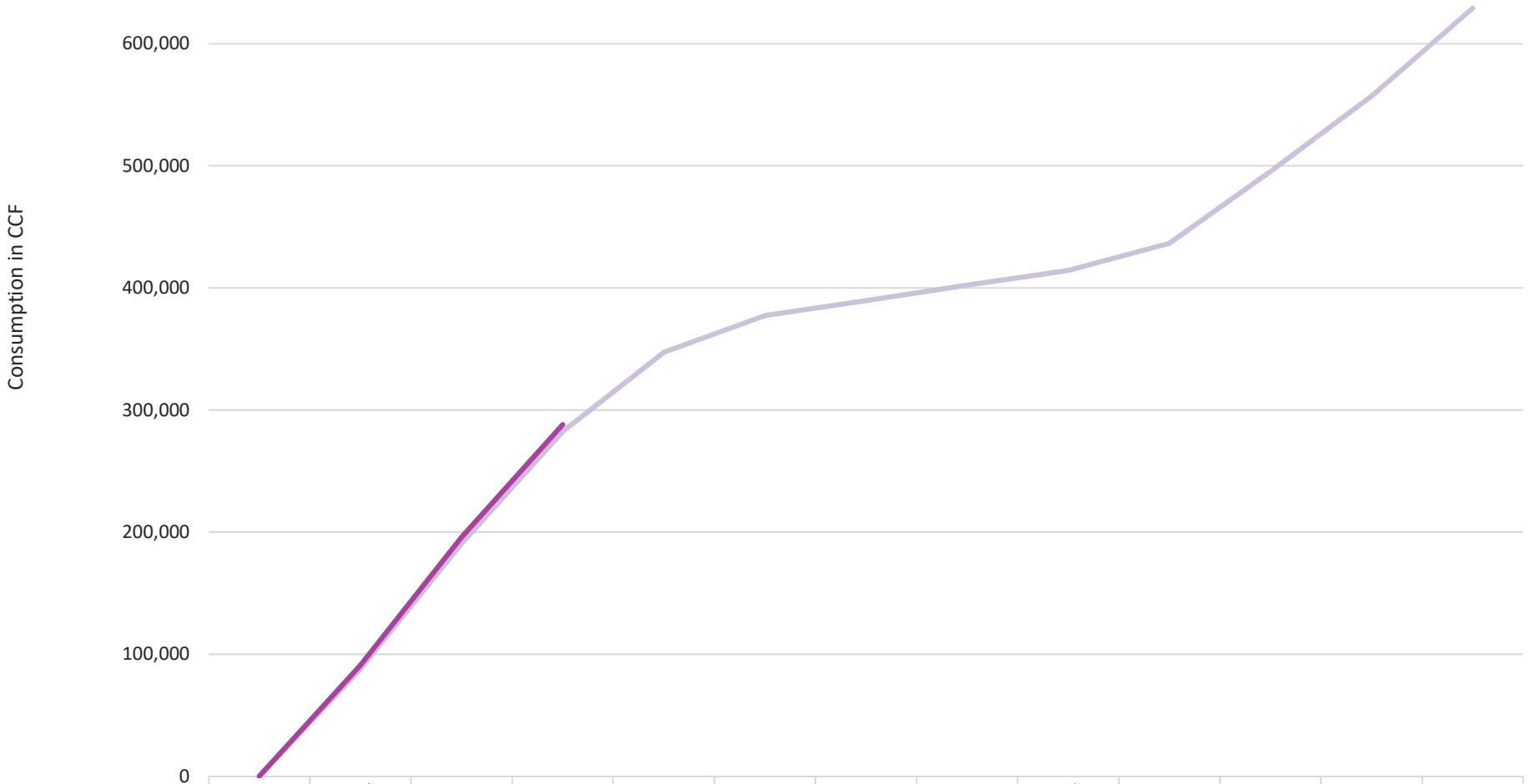
	YTD Start	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2025-2026	0	57,312	123,587	186,885	233,092	266,956	279,326	292,163	308,319	323,795	364,116	408,375	456,184
2026-2027	0	64,589	133,764	201,495									
% Change		12.70%	8.23%	7.82%									

Recycled Water Consumption
FY 2026-27 vs FY 2025-26



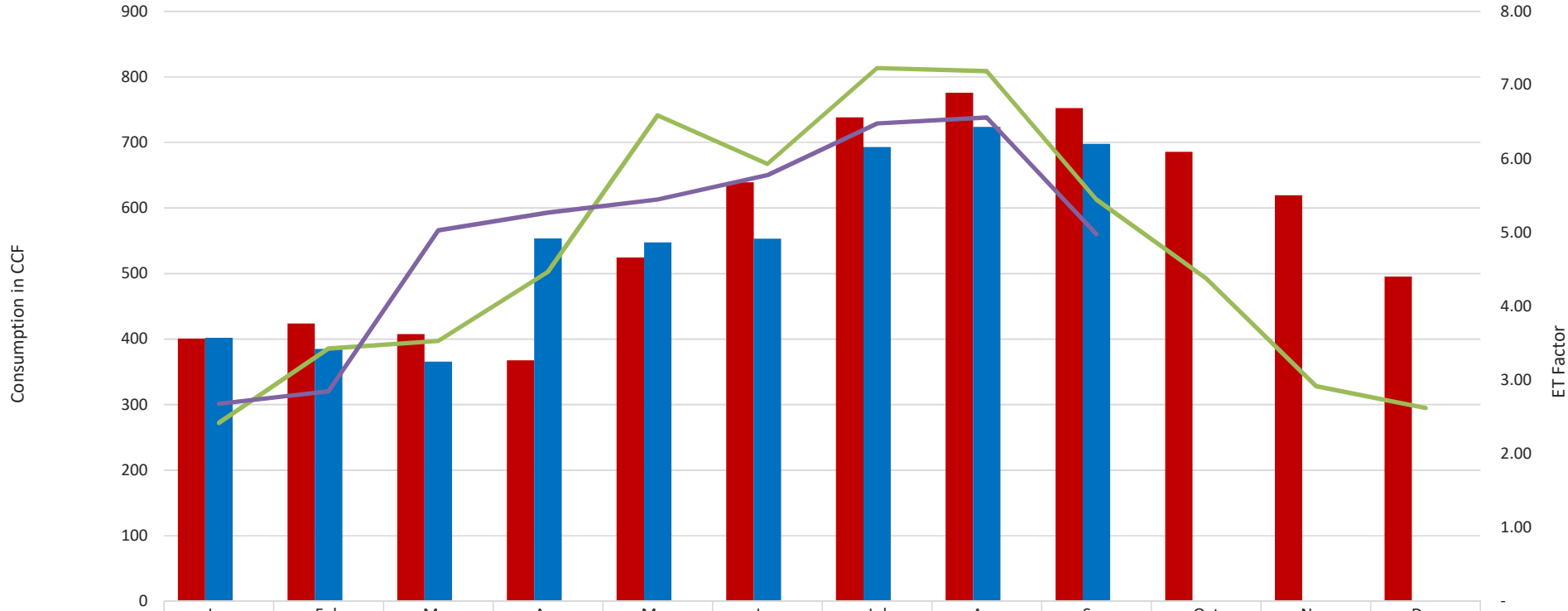
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
FY 2025-2026	87,896	102,736	91,867	64,788	30,130	12,319	12,501	12,078	22,156	58,935	61,692	71,957
FY 2026-2027	90,967	104,926	92,094									
% Change	3.49%	2.13%	0.25%									
FY 25/26 ET	6.65	6.58	4.72	3.69	2.22	1.98	2.68	2.85	5.03	5.27	5.45	5.78
FY 26/27 ET	6.48	6.56	4.98									

Recycled Water YTD Consumption



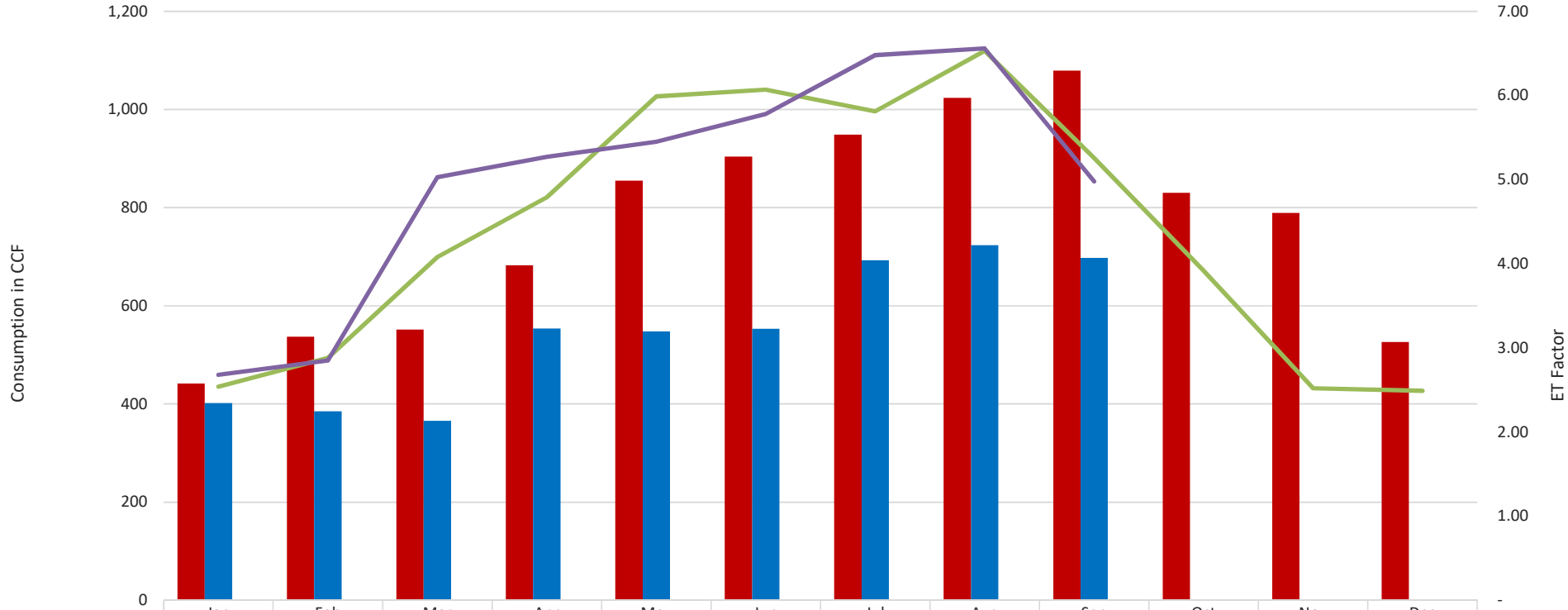
	YTD Start	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2025-2026	0	87,896	190,632	282,499	347,287	377,417	389,736	402,237	414,315	436,471	495,406	557,098	629,055
2026-2027	0	90,967	195,893	287,987									
% Change		3.49%	2.76%	1.94%									

ETWD Customer Consumption vs 2020 (Potable AF)



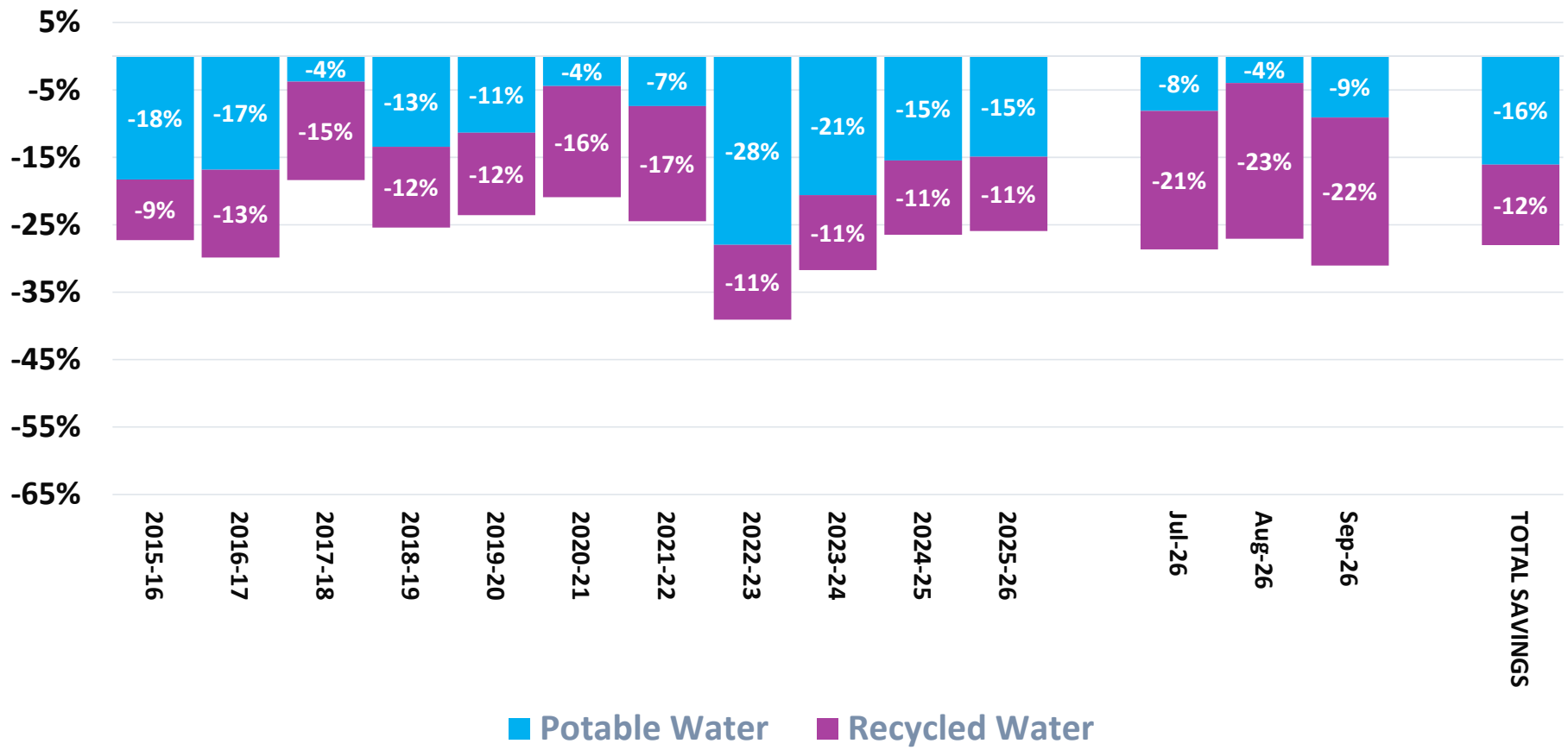
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2020 Potable	400.80	423.80	407.54	367.77	524.43	639.41	738.29	775.67	752.37	685.68	619.43	495.20
2026 Potable	402.11	385.21	365.83	553.98	547.87	553.20	692.79	723.61	698.08			
Potable % Change	0.33%	-9.11%	-10.23%	50.63%	4.47%	-13.48%	-6.16%	-6.71%	-7.22%			
2020 ET	2.42	3.43	3.53	4.47	6.59	5.93	7.23	7.19	5.45	4.38	2.92	2.62
2026 ET	2.68	2.85	5.03	5.27	5.45	5.78	6.48	6.56	4.98			

ETWD Customer Consumption vs 2013 (Potable AF)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2013 Potable	441.82	537.37	551.75	682.75	855.14	903.87	948.61	1023.72	1079.11	830.36	789.23	526.37
2026 Potable	402.11	385.21	365.83	553.98	547.87	553.20	692.79	723.61	698.08			
Potable % Change	-8.99%	-28.32%	-33.70%	-18.86%	-35.93%	-38.80%	-26.97%	-29.32%	-35.31%			
2013 ET	2.54	2.88	4.08	4.79	5.99	6.07	5.81	6.53	5.26	3.92	2.52	2.49
2026 ET	2.68	2.85	5.03	5.27	5.45	5.78	6.48	6.56	4.98			

ETWD WATER USAGE COMPARED TO 2013



I hereby certify that the following Agenda was posted at least 72 hours prior to the time of the Board Meeting so noticed below at the usual agenda posting location of the South Orange County Wastewater Authority (SOCWA) and at www.socwa.com.

Lynda May, Assistant Secretary
SOCWA and the Board of Directors thereof

REVISED

Regular Meeting of The
South Orange County Wastewater Authority
Board of Directors

October 1, 2026
8:30 a.m.

PHYSICAL MEETING LOCATION:
South Orange County Wastewater Authority
34156 Del Obispo Street
Dana Point, CA 92629

THE BOARD OF DIRECTORS MEETING ROOM IS WHEELCHAIR ACCESSIBLE. IF YOU REQUIRE ANY SPECIAL DISABILITY RELATED ACCOMMODATIONS, PLEASE CONTACT THE SOUTH ORANGE COUNTY WASTEWATER AUTHORITY SECRETARY'S OFFICE AT (949) 234-5400 AT LEAST SEVENTY-TWO (72) HOURS PRIOR TO THE SCHEDULED MEETING TO REQUEST SUCH ACCOMMODATIONS. THIS AGENDA CAN BE OBTAINED IN ALTERNATE FORMAT UPON REQUEST TO THE SOUTH ORANGE COUNTY WASTEWATER AUTHORITY'S SECRETARY AT LEAST SEVENTY-TWO (72) HOURS PRIOR TO THE SCHEDULED MEETING. MEMBERS OF THE PUBLIC HAVE THE OPTION TO PARTICIPATE IN AND MAY JOIN THE MEETING REMOTELY VIA VIDEO CONFERENCE FOR VISUAL INFORMATION ONLY (USE ZOOM LINK BELOW) AND BY TELECONFERENCE FOR AUDIO PARTICIPATION (USE PHONE NUMBERS BELOW). THIS IS A PHONE-CALL MEETING AND NOT A WEB-CAST MEETING, SO PLEASE REFER TO AGENDA MATERIALS AS POSTED ON THE WEBSITE AT WWW.SOCWA.COM. ON YOUR REQUEST, EVERY EFFORT WILL BE MADE TO ACCOMMODATE PARTICIPATION. FOR PARTIES PARTICIPATING REMOTELY, PUBLIC COMMENTS WILL BE TAKEN DURING THE MEETING FOR ORAL COMMUNICATION IN ADDITION TO PUBLIC COMMENTS RECEIVED BY PARTIES PARTICIPATING IN PERSON. COMMENTS MAY BE SUBMITTED PRIOR TO THE MEETING VIA EMAIL TO ASSISTANT SECRETARY LYNDA MAY AT LMAY@SOCWA.COM WITH THE SUBJECT LINE "REQUEST TO PROVIDE PUBLIC COMMENT." IN THE EMAIL, PLEASE INCLUDE YOUR NAME, THE ITEM YOU WISH TO SPEAK ABOUT, AND THE TELEPHONE NUMBER YOU WILL BE CALLING FROM SO THAT THE COORDINATOR CAN UN-MUTE YOUR LINE WHEN YOU ARE CALLED UPON TO SPEAK. THOSE MAKING PUBLIC COMMENT REQUESTS REMOTELY VIA TELEPHONE IN REAL-TIME WILL BE ASKED TO PROVIDE YOUR NAME, THE ITEM YOU WISH TO SPEAK ABOUT, AND THE TELEPHONE NUMBER THAT YOU ARE CALLING FROM SO THE COORDINATOR CAN UNMUTE YOUR LINE WHEN YOU ARE CALLED UPON TO SPEAK. ONCE THE MEETING HAS COMMENCED, THE CHAIR WILL INVITE YOU TO SPEAK AND ASK THE COORDINATOR TO UNMUTE YOUR LINE AT THE APPROPRIATE TIME.

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South Orange County Wastewater Authority
Board of Directors Meeting
October 1, 2026

Agenda

Director Scott Goldman, South Coast Water District, will be appearing remotely in compliance with Senate Bill 707.

1. CALL TO ORDER

2. PLEDGE OF ALLEGIANCE

3. ORAL COMMUNICATIONS

Members of the public may address the Board regarding an item on the agenda or may reserve this opportunity during the meeting at the time the item is discussed by the Board. There will be a three-minute limit for public comments.

4. APPROVAL OF BOARD MEMBER REQUEST FOR REMOTE PARTICIPATION

ACTION Board Discussion/Direction and Action.

PAGE NO.

5. CONSENT CALENDAR

A. Minutes of Board of Directors 1

- Board of Directors Special Meeting of September 10, 2026

ACTION The Board will be requested to approve the subject Minutes.

B. Minutes of Finance Committee 6

- Finance Committee Meeting of April 21, 2026

ACTION The Board will be requested to receive and file the subject Minutes.

C. August 2026 Operations Report 9

1. Monthly Operational Report
2. SOCWA Ocean Outfall Discharges by Agency
3. Beach Ocean Monitoring Report
4. Recycled Water Report
5. Pretreatment Report (September)

ACTION The Board will be requested to receive and file subject reports as submitted.

D. Capital Improvement Construction Projects Progress and Change Order Report (September) [Project Committees 2 and 15] 49

ACTION Information Item.

E. Capital Improvement Program Workplan 54

ACTION Information Item.

F. Financial Report June 2026 56

ACTION The Finance Committee recommends the Board of Directors receive and file the June 2026 Financial Reports.

Agenda

6. ENGINEERING MATTERS

   A. JBL Digester Underground Piping Replacement Construction Management Services [Project Committee 2] 57

      ACTION Board Discussion, Direction, or Action.

   B. JBL Plant 1 Generator Updates [Project Committee 2] 130

      ACTION Board Discussion, Direction, or Action.

7. GENERAL MANAGER'S REPORT

   A. Use Audit Flows and Solids FY 25-26 132

      ACTION Staff requests that the Board of Directors the approve the Use Audit calculated results for the close of the Use Audit for disbursement or collection of additional funds in FY 25-26.

   B. Legal RFP Award 135

      ACTION Staff recommends that the Board of Directors authorize the General Manager to sign the Snell and Wilmer Agreement for Legal Counsel Services.

   C. Orbis Public Affairs Contract 143

      ACTION Board Discussion, Direction, or Action.

   D. General Manager's Report 160

      ACTION Board Discussion, Direction, or Action.

   E. General Counsel's Report

      ACTION Board Discussion, Direction, or Action.

   F. Government Affairs Report 235

      ACTION Board Discussion, Direction, or Action.

   G. Upcoming Meetings Schedule:

      - November 5, 2026 – Board of Directors Meeting
      - October 13, 2026 – Executive Committee Meeting
      - October 15, 2026 – Engineering Committee Meeting
      - October 20, 2026 – Finance Committee Meeting

      ACTION Information Item.

8. CLOSED SESSION

   Initiation of litigation pursuant to Government Code § 54956.9(d)(4)
   Conference with Legal Counsel - Anticipated Litigation
   One Potential Case

Agenda

9. OTHER MATTERS

   Determine the need to take action on the following item(s) introduced by the General Manager, which arose after the posted agenda. [Adoption of this action requires a two-thirds vote of the Board, or if less than two-thirds are present, a unanimous vote.]

10. ADJOURNMENT

THE NEXT BOARD MEETING IS NOVEMBER 5, 2026

REVISED

NOTICE OF REGULAR MEETING
OF THE
SOUTH ORANGE COUNTY WASTEWATER AUTHORITY

EXECUTIVE COMMITTEE

October 13, 2026

1:30 p.m.

NOTICE IS HEREBY GIVEN that a Regular Meeting of the South Orange County Wastewater Authority (SOCWA) Executive Committee was called to be held on **October 13, 2026, at 1:30 p.m.** SOCWA staff will be present and conducting the meeting at SOCWA Administrative Office located at 34156 Del Obispo Street, Dana Point, California.

THE SOCWA MEETING ROOM IS WHEELCHAIR ACCESSIBLE. IF YOU REQUIRE ANY SPECIAL DISABILITY RELATED ACCOMMODATIONS, PLEASE CONTACT THE SOUTH ORANGE COUNTY WASTEWATER AUTHORITY SECRETARY'S OFFICE AT (949) 234-5400 AT LEAST SEVENTY-TWO (72) HOURS PRIOR TO THE SCHEDULED MEETING TO REQUEST SUCH ACCOMMODATIONS. THIS AGENDA CAN BE OBTAINED IN ALTERNATE FORMAT UPON REQUEST TO THE SOUTH ORANGE COUNTY WASTEWATER AUTHORITY'S SECRETARY AT LEAST SEVENTY-TWO (72) HOURS PRIOR TO THE SCHEDULED MEETING. MEMBERS OF THE PUBLIC HAVE THE OPTION TO PARTICIPATE IN AND MAY JOIN THE MEETING REMOTELY VIA VIDEO CONFERENCE FOR VISUAL INFORMATION ONLY (USE ZOOM LINK BELOW) AND BY TELECONFERENCE FOR AUDIO PARTICIPATION (USE PHONE NUMBERS BELOW). THIS IS A PHONE-CALL MEETING AND NOT A WEB-CAST MEETING, SO PLEASE REFER TO AGENDA MATERIALS AS POSTED ON THE WEBSITE AT WWW.SOCWA.COM. ON YOUR REQUEST, EVERY EFFORT WILL BE MADE TO ACCOMMODATE PARTICIPATION. FOR PARTIES PARTICIPATING REMOTELY, PUBLIC COMMENTS WILL BE TAKEN DURING THE MEETING FOR ORAL COMMUNICATION IN ADDITION TO PUBLIC COMMENTS RECEIVED BY PARTIES PARTICIPATING IN PERSON. COMMENTS MAY BE SUBMITTED PRIOR TO THE MEETING VIA EMAIL TO ASSISTANT SECRETARY LYNDA MAY AT LMAY@SOCWA.COM WITH THE SUBJECT LINE "REQUEST TO PROVIDE PUBLIC COMMENT." IN THE EMAIL, PLEASE INCLUDE YOUR NAME, THE ITEM YOU WISH TO SPEAK ABOUT, AND THE TELEPHONE NUMBER YOU WILL BE CALLING FROM SO THAT THE COORDINATOR CAN UN-MUTE YOUR LINE WHEN YOU ARE CALLED UPON TO SPEAK. THOSE MAKING PUBLIC COMMENT REQUESTS REMOTELY VIA TELEPHONE IN REAL-TIME WILL BE ASKED TO PROVIDE YOUR NAME, THE ITEM YOU WISH TO SPEAK ABOUT, AND THE TELEPHONE NUMBER THAT YOU ARE CALLING FROM SO THE COORDINATOR CAN UN-MUTE YOUR LINE WHEN YOU ARE CALLED UPON TO SPEAK. ONCE THE MEETING HAS COMMENCED, THE CHAIR WILL INVITE YOU TO SPEAK AND ASK THE COORDINATOR TO UN-MUTE YOUR LINE AT THE APPROPRIATE TIME.

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REGULAR MEETING – EXECUTIVE COMMITTEE
October 13, 2026

AGENDA

1. Call Meeting to Order

2. Public Comments

   THOSE WISHING TO ADDRESS THE EXECUTIVE COMMITTEE ON ANY ITEM LISTED ON THE AGENDA WILL BE REQUESTED TO IDENTIFY AT THE OPENING OF THE MEETING AND PRIOR TO THE CLOSE OF THE MEETING. THE AUTHORITY REQUESTS THAT YOU STATE YOUR NAME WHEN MAKING THE REQUEST IN ORDER THAT YOUR NAME MAY BE CALLED TO SPEAK ON THE ITEM OF INTEREST. THE CHAIR OF THE MEETING WILL RECOGNIZE SPEAKERS FOR COMMENT AND GENERAL MEETING DECORUM SHOULD BE OBSERVED IN ORDER THAT SPEAKERS ARE NOT TALKING OVER EACH OTHER.

3. SOCWA Vision and Strategic Plan 1

   Recommended Action: Committee Discussion/Direction and Action.

4. Innovation Activities 3

   Recommended Action: Committee Discussion/Direction and Action.

5. Capital Program and Capital Asset Lifecycle Board Oversight Policy 5

   Recommended Action: Committee Discussion/Direction and Action

6. Public Advocacy 6

   Recommended Action: Committee Discussion/Direction and Action.

7. El Nino Preparedness Meetings 7

   Recommended Action: Committee Discussion/Direction and Action.

8. Open Discussion

9. Adjournment

   I hereby certify that the foregoing Notice was personally emailed or mailed to each member of the Executive Committee at least 72 hours prior to the scheduled time of the Regular Meeting referred to above.

   I hereby certify that the foregoing Notice was posted at least 72 hours prior to the time of the above-referenced Executive Committee at the usual agenda posting location of the South Orange County Wastewater Authority and at www.socwa.com.

Dated this 8th day of October 2026.

Lynda May

Lynda May, Assistant Secretary
SOUTH ORANGE COUNTY WASTEWATER AUTHORITY

NOTICE OF REGULAR MEETING
OF THE
SOUTH ORANGE COUNTY WASTEWATER AUTHORITY
ENGINEERING COMMITTEE
October 15, 2026
8:30 a.m.

Physical Address	Remote Address
34156 Del Obispo Street Dana Point, CA 92629	El Toro Water District Office: 24251 Los Alisos Blvd. Lake Forest, CA 92630

NOTICE IS HEREBY GIVEN that a Regular Meeting of the South Orange County Wastewater Authority (SOCWA) Engineering Committee was called to be held on **October 15, 2026, at 8:30 a.m.** SOCWA staff will be present and conducting the meeting at the SOCWA Administrative Office located at 34156 Del Obispo Street, Dana Point, California.

THE SOCWA MEETING ROOM IS WHEELCHAIR ACCESSIBLE. IF YOU REQUIRE ANY SPECIAL DISABILITY RELATED ACCOMMODATIONS, PLEASE CONTACT THE SOUTH ORANGE COUNTY WASTEWATER AUTHORITY SECRETARY'S OFFICE AT (949) 234-5400 AT LEAST SEVENTY-TWO (72) HOURS PRIOR TO THE SCHEDULED MEETING TO REQUEST SUCH ACCOMMODATIONS. THIS AGENDA CAN BE OBTAINED IN ALTERNATE FORMAT UPON REQUEST TO THE SOUTH ORANGE COUNTY WASTEWATER AUTHORITY'S SECRETARY AT LEAST SEVENTY-TWO (72) HOURS PRIOR TO THE SCHEDULED MEETING. MEMBERS OF THE PUBLIC HAVE THE OPTION TO PARTICIPATE IN AND MAY JOIN THE MEETING REMOTELY VIA VIDEO CONFERENCE FOR VISUAL INFORMATION ONLY (USE ZOOM LINK BELOW) AND BY TELECONFERENCE FOR AUDIO PARTICIPATION (USE PHONE NUMBERS BELOW). THIS IS A PHONE-CALL MEETING AND NOT A WEB-CAST MEETING, SO PLEASE REFER TO AGENDA MATERIALS AS POSTED ON THE WEBSITE AT WWW.SOCWA.COM. ON YOUR REQUEST, EVERY EFFORT WILL BE MADE TO ACCOMMODATE PARTICIPATION. FOR PARTIES PARTICIPATING REMOTELY, PUBLIC COMMENTS WILL BE TAKEN DURING THE MEETING FOR ORAL COMMUNICATION IN ADDITION TO PUBLIC COMMENTS RECEIVED BY PARTIES PARTICIPATING IN PERSON. COMMENTS MAY BE SUBMITTED PRIOR TO THE MEETING VIA EMAIL TO ASSISTANT SECRETARY LYNDA MAY AT LMAY@SOCWA.COM WITH THE SUBJECT LINE "REQUEST TO PROVIDE PUBLIC COMMENT." IN THE EMAIL, PLEASE INCLUDE YOUR NAME, THE ITEM YOU WISH TO SPEAK ABOUT, AND THE TELEPHONE NUMBER YOU WILL BE CALLING FROM SO THAT THE COORDINATOR CAN UN-MUTE YOUR LINE WHEN YOU ARE CALLED UPON TO SPEAK. THOSE MAKING PUBLIC COMMENT REQUESTS REMOTELY VIA TELEPHONE IN REAL-TIME WILL BE ASKED TO PROVIDE YOUR NAME, THE ITEM YOU WISH TO SPEAK ABOUT, AND THE TELEPHONE NUMBER THAT YOU ARE CALLING FROM SO THE COORDINATOR CAN UN-MUTE YOUR LINE WHEN YOU ARE CALLED UPON TO SPEAK. ONCE THE MEETING HAS COMMENCED, THE CHAIR WILL INVITE YOU TO SPEAK AND ASK THE COORDINATOR TO UN-MUTE YOUR LINE AT THE APPROPRIATE TIME.

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Engineering Committee Meeting
October 15, 2026

AGENDA

1. Call Meeting to Order

2. Public Comments

THOSE WISHING TO ADDRESS THE ENGINEERING COMMITTEE ON ANY ITEM LISTED ON THE AGENDA WILL BE REQUESTED TO IDENTIFY AT THE OPENING OF THE MEETING AND PRIOR TO THE CLOSE OF THE MEETING. THE AUTHORITY REQUESTS THAT YOU STATE YOUR NAME WHEN MAKING THE REQUEST IN ORDER THAT YOUR NAME MAY BE CALLED TO SPEAK ON THE ITEM OF INTEREST. THE CHAIR OF THE MEETING WILL RECOGNIZE SPEAKERS FOR COMMENT AND GENERAL MEETING DECORUM SHOULD BE OBSERVED IN ORDER THAT SPEAKERS ARE NOT TALKING OVER EACH OTHER DURING THE CALL.

PAGE NO.

3. Approval of Minutes.....1

- Engineering Committee Minutes of June 18, 2026

Recommended Action: Staff requests that the Engineering Committee approve the subject Minutes as submitted.

4. General Manager's Report 4

Recommended Action: Committee Discussion, Direction, and Action.

5. Cost Allocation Policy.....7

Recommended Action: Staff recommends that the Engineering Committee accept the redline changes to the Cost Allocation Policy and recommends the approval of the Cost Allocation Policy to the SOCWA Board of Directors.

6. Operations Report

Recommended Action: Information Item.

7. Capital Improvement Workplan FY 26-27 (October).....30

Recommended Action: Information Item.

8. Capital Improvement Construction Projects Progress and Change Order Report (October) [Project Committees 2 and 15] 34

Recommended Action: Information Item.

9. Proposed Capital Project Chartering Process to Support Capital Improvement Planning 42

Recommended Action: Staff recommends to the Engineering Committee to recommend to the SOCWA Board of Directors, SOCWA's staff utilization of the Project Charter for immediate implementation in the Capital Improvement Program.

10. Draft CTP Regional Flow Study Update [Project Committee 15] 55

Recommended Action: Committee Discussion, Direction, and Action.

11. Template Report for Large CIP Projects..... 169

Recommended Action: Committee Discussion, Direction, and Action.

12. Adjournment

I hereby certify that the foregoing Notice was personally emailed or mailed to each member of the SOCWA Engineering Committee at least 72 hours prior to the scheduled time of the Regular Meeting referred to above.

I hereby certify that the foregoing Notice was posted at least 72 hours prior to the time of the above-referenced Engineering Committee meeting at the usual agenda posting location of the South Orange County Wastewater Authority and at www.socwa.com.

Dated this 11th day of October 2026.

Lynda May

Lynda May, Assistant Secretary
SOUTH ORANGE COUNTY WASTEWATER AUTHORITY

MEETING OF THE BOARD OF DIRECTORS OF THE
MUNICIPAL WATER DISTRICT OF ORANGE COUNTY
Jointly with the
PLANNING & OPERATIONS COMMITTEE
18700 Ward Street, Conference Room 101, Fountain Valley, CA 92708
October 5, 2026, 8:30 a.m.

Teleconference Sites:
17420 Walnut Street, Fountain Valley, CA 92708
1961 Aliso Avenue, Costa Mesa, CA 92627
25652 Paseo De La Paz, San Juan Capistrano, CA 92675

This meeting will be held in person at 18700 Ward Street, Fountain Valley, California, 92708 (Conference Room 101). As a convenience for the public, the meeting may also be accessed by Zoom Webinar and will be available by either computer or telephone audio as indicated below. Because this is an in-person meeting and the Zoom component is not required, but rather is being offered as a convenience, if there are any technical issues during the meeting, this meeting will continue and will not be suspended.

Computer Audio: You can join the Zoom meeting by clicking on the following link:
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Telephone Audio: **(669) 900 9128**
Webinar ID: **882 866 5300#**

P&O Committee:
Director Seckel, Chair
Director McVicker
Director Yoo Schneider

Staff: H. De La Torre, M. Baum-Haley, A. Crespi, C. Busslinger, V. Osborn, K. Pham

Ex Officio Member: President Dick

MWDOC Committee meetings are noticed and held as joint meetings of the Committee and the entire Board of Directors, and all members of the Board of Directors may attend and participate in the discussion. Each Committee has designated Committee members, and other members of the Board are designated alternate committee members. If less than a quorum of the full Board is in attendance, the Board meeting will be adjourned for lack of a quorum and the meeting will proceed as a meeting of the Committee with those Committee members and alternate members in attendance acting as the Committee.

ROLL CALL

PUBLIC COMMENTS
Public comments on agenda items and items under the jurisdiction of the Committee should be made at this time.

ITEMS RECEIVED TOO LATE TO BE AGENDIZED
Determine need and take action to agendize item(s), which arose subsequent to the posting of the Agenda. (Requires a unanimous vote of the Committee).

ITEMS DISTRIBUTED TO THE BOARD LESS THAN 72 HOURS PRIOR TO THE MEETING
Pursuant to Government Code section 54957.5, non-exempt public records that relate to open session agenda items and are distributed to a majority of the Board less than 72 hours prior to the meeting will be available for public inspection in the lobby of the District's business office located at 18700 Ward Street, Fountain Valley, California 92708, during regular business hours. When practical, these public records will also be made available on the District's Internet Website, accessible at http://www.mwdoc.com.

PRESENTATION ITEM

1. SUMMARY OF ORANGE COUNTY FISCAL YEAR 2025-26 USAGE AND MWDOC ANNUAL SALES

ACTION ITEMS

2. AMENDMENT TO AN AGREEMENT WITH GARDENSOFT CORPORATION FOR THE ORANGE COUNTY WATER SMART GARDENS WEBSITE

3. CALIFORNIA WATER EFFICIENCY PARTNERSHIP (CALWEP) DIRECT DISTRIBUTION PROGRAM

INFORMATION ITEMS

4. ORANGE COUNTY WATER SUMMIT RECAP

5. QUARTERLY K-12 CHOICE SCHOOL PROGRAMS UPDATE

6. PUBLIC AFFAIRS HIGHLIGHTS

7. DEPARTMENT ACTIVITIES REPORTS
   a. Ongoing MWDOC Reliability and Engineering/Planning Projects
   b. WEROC
   c. Water Use Efficiency
   d. Water Loss Control
   e. Public and Government Affairs

8. REVIEW OF ISSUES RELATED TO PLANNING OR ENGINEERING PROJECTS, WEROC, WATER USE EFFICIENCY, FACILITY AND EQUIPMENT MAINTENANCE, WATER STORAGE, WATER QUALITY, CONJUNCTIVE USE PROGRAMS, EDUCATION, PUBLIC AFFAIRS PROGRAMS AND EVENTS, PUBLIC INFORMATION PROJECTS, PUBLIC INFORMATION CONSULTANTS, DISTRICT FACILITIES, AND MEMBER AGENCY RELATIONS

ADJOURNMENT

NOTE: At the discretion of the Committee, all items appearing on this agenda, whether or not expressly listed for action, may be deliberated, and may be subject to action by the Committee. On those items designated for Board action, the Committee reviews the items and makes a recommendation for final action to the full Board of Directors; final action will be taken by the Board of Directors. Agendas for Committee and Board meetings may be obtained from the District Secretary. Members of the public are advised that the Board consideration process includes consideration of each agenda item by one or more Committees indicated on the Board Action Sheet. Attendance at Committee meetings and the Board meeting considering an item consequently is advised.

Accommodations for the Disabled. Any person may make a request for a disability-related modification or accommodation needed for that person to be able to participate in the public meeting by telephoning Angela Crespi, District Secretary, at (714) 963-3058, or writing to Municipal Water District of Orange County at 18700 Ward Street, Unit B, Fountain Valley, CA 92708. Requests must specify the nature of the disability and the type of accommodation requested. A telephone number or other contact information should be included so that District staff may discuss appropriate arrangements. Persons requesting a disability-related accommodation should make the request with adequate time before the meeting for the District to provide the requested accommodation.

WORKSHOP MEETING OF THE
MUNICIPAL WATER DISTRICT OF ORANGE COUNTY
BOARD OF DIRECTORS WITH METROPOLITAN DIRECTORS
18700 Ward Street, Conference Room 101, Fountain Valley, California
October 7, 2026, 8:30 a.m.

Teleconference Sites:
17420 Walnut Street, Fountain Valley, CA 92708
1961 Aliso Avenue, Costa Mesa, CA 92627
25652 Paseo De La Paz, San Juan Capistrano, CA 92675

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Telephone Audio: **(669) 900 9128**
Webinar ID: **882 866 5300#**

AGENDA

PLEDGE OF ALLEGIANCE

ROLL CALL

PUBLIC COMMENTS
At this time members of the public will be given an opportunity to address the Board concerning items within the subject matter jurisdiction of the Board. Members of the public may also address the Board about a particular Agenda item at the time it is considered by the Board and before action is taken.

The Board requests, but does not require, that members of the public who want to address the Board complete a voluntary "Request to be Heard" form available from the Board Secretary prior to the meeting.

ITEMS RECEIVED TOO LATE TO BE AGENDIZED
Determine need and take action to agendize item(s), which arose subsequent to the posting of the Agenda. (ROLL CALL VOTE: Adoption of this recommendation requires a two-thirds vote of the Board members present or, if less than two-thirds of the Board members are present a unanimous vote).

ITEMS DISTRIBUTED TO THE BOARD LESS THAN 72 HOURS PRIOR TO THE MEETING
Pursuant to Government Code Section 54957.5, non-exempt public records that relate to open session agenda items and are distributed to a majority of the Board less than 72 hours prior to the meeting will be available for public inspection in the lobby of the District's business office located at 18700 Ward Street, Fountain Valley, California 92708, during regular business hours. When practical, these public records will also be made available on the District's Internet Website, accessible at http://www.mwdoc.com.

NEXT RESOLUTION NO. 2181

PRESENTATION ITEM

1. INVITATION FOR METROPOLITAN CHAIR CANDIDATE

Recommendation: Receive and file the presentation.

DISCUSSION ITEMS

2. LEGISLATIVE ACTIVITIES

a. Federal Legislative Report (Natural Resource Results)
b. State Legislative Report (West Coast Advisors)
c. Legal and Regulatory Report (Ackerman)
d. County Legislative Report (Whittingham)
e. MWDOC Legislative Matrix
f. Metropolitan Legislative Matrix

Recommendation: Review and discuss the information presented.

3. QUESTIONS OR INPUT ON METROPOLITAN ISSUES FROM THE MEMBER AGENCIES/METROPOLITAN DIRECTOR REPORTS REGARDING METROPOLITAN COMMITTEE PARTICIPATION

Recommendation: Receive input and discuss the information presented.

INFORMATION ITEMS

4. METROPOLITAN ITEMS CRITICAL TO ORANGE COUNTY

a. Metropolitan's Finances
b. Metropolitan's Water Supply Condition Update
c. Metropolitan's Water Quality Update
d. Colorado River Issues
e. Delta Conveyance Activities and State Water Project Issues

5. METROPOLITAN BOARD AGENDA DISCUSSION ITEMS

a. Summary regarding September Metropolitan Board Meeting
b. Review items of significance for the Metropolitan Board Agenda

ADJOURNMENT

Note: Accommodations for the Disabled. Any person may make a request for a disability-related modification or accommodation needed for that person to be able to participate in the public meeting by contacting Angela Crespi, District Secretary, at (714) 963-3058, or writing to Municipal Water District of Orange County at 18700 Ward Street, Unit B, Fountain Valley, CA 92708. Requests must specify the nature of the disability and the type of accommodation requested. A telephone number or other contact information should be included so that District staff may discuss appropriate arrangements. Persons requesting a disability-related accommodation should make the request with adequate time before the meeting for the District to provide the requested accommodation.

MEETING OF THE BOARD OF DIRECTORS OF THE
MUNICIPAL WATER DISTRICT OF ORANGE COUNTY
Jointly with the
ADMINISTRATION & FINANCE COMMITTEE
18700 Ward Street, Conference Room 101, Fountain Valley, CA 92708
October 14, 2026, 8:30 a.m.

Teleconference Sites:
17420 Walnut Street, Fountain Valley, CA 92708
25652 Paseo De La Paz, San Juan Capistrano, CA 92675

This meeting will be held in person at 18700 Ward Street, Fountain Valley, California, 92708 (Conference Room 101). As a convenience for the public, the meeting may also be accessed by Zoom Webinar and will be available by either computer or telephone audio as indicated below. Because this is an in-person meeting and the Zoom component is not required, but rather is being offered as a convenience, if there are any technical issues during the meeting, this meeting will continue and will not be suspended.

Computer Audio: You can join the Zoom meeting by clicking on the following link:
https://zoom.us/j/8828665300

Telephone Audio: **(669) 900 9128**
Webinar ID: **882 866 5300#**

A&F Committee:
Director Thomas, Chair
Director Nederhood
Director Crane

Staff: H. De La Torre, M. Baum-Haley, A. Crespi, C. Harris, H. Chumpitazi, K. Pham

Ex Officio Member: President Dick

MWDOC Committee meetings are noticed and held as joint meetings of the Committee and the entire Board of Directors and all members of the Board of Directors may attend and participate in the discussion. Each Committee has designated Committee members, and other members of the Board are designated alternate committee members. If less than a quorum of the full Board is in attendance, the Board meeting will be adjourned for lack of a quorum and the meeting will proceed as a meeting of the Committee with those Committee members and alternate members in attendance acting as the Committee.

ROLL CALL

PUBLIC COMMENTS
Public comments on agenda items and items under the jurisdiction of the Committee should be made at this time.

ITEMS RECEIVED TOO LATE TO BE AGENDIZED
Determine need and take action to agendize item(s), which arose subsequent to the posting of the Agenda. (Requires a unanimous vote of the Committee).

ITEMS DISTRIBUTED TO THE BOARD LESS THAN 72 HOURS PRIOR TO THE MEETING
Pursuant to Government Code section 54957.5, non-exempt public records that relate to open session agenda items and are distributed to a majority of the Board less than 72 hours prior to the meeting will be available for public inspection in the lobby of the District's business office located at 18700 Ward Street, Fountain Valley, California 92708, during regular business hours. When practical, these public records will also be made available on the District's Internet Website, accessible at http://www.mwdoc.com.

PROPOSED BOARD CONSENT CALENDAR ITEMS

1. TREASURER'S REPORT
   a. Revenue/Cash Receipt Report – September 2026
   b. Disbursement Approval Report for the month of October 2026
   c. Disbursement Ratification Report for the month of September 2026
   d. GM Approved Disbursement Report for the month of September 2026
   e. Consolidated Summary of Cash and Investment – August 2026
   f. OPEB and Pension Trust Fund statement

2. FINANCIAL REPORT
   a. Combined Financial Statements and Budget Comparative for the Period Ending August 31, 2026

PRESENTATION ITEM

3. OTHER POST-EMPLOYMENT BENEFITS (OPEB) TRUST AND PENSION RATE STABILIZATION PROGRAM (PRESENTATION BY PUBLIC AGENCY RETIREMENT SERVICES)

ACTION ITEMS

4. ADOPT A RESOLUTION OF INTENTION TO APPROVE AN AMENDMENT TO THE CONTRACT WITH THE CALIFORNIA PUBLIC EMPLOYEES' RETIREMENT SYSTEM (CALPERS)

5. MINOR SAFETY AND PROTECTION POLICY

6. 2027 HEALTH SAVINGS ACCOUNT CONTRIBUTIONS

7. APPROVAL OF ON-CALL ENTERPRISE RESOURCE PLANNING (ERP) POST-IMPLEMENTATION SUPPORT SERVICES PRE-QUALIFIED CONSULTANTS

8. ASSOCIATION OF CALIFORNIA WATER AGENCIES (ACWA) PROPOSED AMENDED AND RESTATED BYLAWS – AUTHORIZATION TO VOTE

INFORMATION ITEMS

9. INDIVIDUAL CHARGES DISCLOSURE REPORT

10. CALIFORNIA PUBLIC EMPLOYEES' RETIREMENT SYSTEM (CALPERS) ANNUAL VALUATION REPORT AS OF JUNE 30, 2025

11. OTHER POST-EMPLOYMENT BENEFITS (OPEB) ACTUARIAL REPORT AS OF JUNE 30, 2026

12. DEPARTMENT ACTIVITIES REPORTS
    a. Administration
    b. Finance and Information Technology

OTHER ITEMS

13. REVIEW ISSUES REGARDING DISTRICT ORGANIZATION, PERSONNEL MATTERS, EMPLOYEE BENEFITS FINANCE, AND INSURANCE

ADJOURNMENT

NOTE: At the discretion of the Committee, all items appearing on this agenda, whether or not expressly listed for action, may be deliberated, and may be subject to action by the Committee. On those items designated for Board action, the Committee reviews the items and makes a recommendation for final action to the full Board of Directors; final action will be taken by the Board of Directors. Agendas for Committee and Board meetings may be obtained from the District Secretary. Members of the public are advised that the Board consideration process includes consideration of each agenda item by one or more Committees indicated on the Board Action Sheet. Attendance at Committee meetings and the Board meeting considering an item consequently is advised.

Accommodations for the Disabled. Any person may make a request for a disability-related modification or accommodation needed for that person to be able to participate in the public meeting by telephoning Angela Crespi, District Secretary, at (714) 963-3058, or writing to Municipal Water District of Orange County at 18700 Ward Street, Unit B, Fountain Valley, CA 92708. Requests must specify the nature of the disability and the type of accommodation requested. A telephone number or other contact information should be included so that District staff may discuss appropriate arrangements. Persons requesting a disability-related accommodation should make the request with adequate time before the meeting for the District to provide the requested accommodation.

SOUTH ORANGE COUNTY AGENCIES GROUP JOINT MEETING with Municipal Water District of Orange County (MWDOC) and Orange County Water District (OCWD)

SANTA MARGARITA WATER DISTRICT
26111 ANTONIO PARKWAY, RANCHO SANTA MARGARITA, CA 92688
THURSDAY, SEPTEMBER 24, 2026
12:00 PM to 1:30 PM

AGENDA

1. **WELCOME AND INTRODUCTIONS**
2. **SPECIAL GUEST: Assemblymember Diane Dixon**
3. **SPEAKER: ORANGE COUNTY FIRE AUTHORITY**
   a. **OCFA to share priorities as we head into fire season**
   b. **Collaboration between OCFA and water agency efforts.**
4. **WHOLESALE AGENCY UPDATES (MWD, MWDOC, OCWD)**
   a. MWDOC / MET Update
   b. OCWD Update
5. **SOUTH ORANGE COUNTY UPDATES**
6. **LEGISLATIVE/REGULATORY UPDATES**
7. **FUTURE MEETINGS**
   a. Next Meeting: Tuesday, November 24th at 12:00 pm
8. **ADJOURNMENT**

ORANGE COUNTY LAFCO

2677 North Main Street | Suite 1050
Santa Ana, CA 92705
Phone: 714.640.5100 | **Fax:** 714.640.5139

LOCAL AGENCY FORMATION COMMISSION OF ORANGE COUNTY

REGULAR MEETING AGENDA

Wednesday, October 14, 2026
8:15 a.m.

County Administrative North (CAN)
First Floor Multipurpose Room 101
400 W. Civic Center Drive, Santa Ana, CA 92701
Members of the public may access the audio/video live-streamed meeting at
https://youtube.com/live/DWL6Zbd-BHI?feature=share

Any member of the public may request to speak on any agenda item at the time the Commission is considering the item.

1. **CALL THE MEETING TO ORDER**

2. **PLEDGE OF ALLEGIANCE**

3. **ROLL CALL**

4. **ANNOUNCEMENT OF SUPPLEMENTAL COMMUNICATION**
   (Communications received after agenda distribution for agendized items.)

5. **PUBLIC COMMENT**
   This is an opportunity for members of the public to address the Commission on items not on the agenda, provided that the subject matter is within the jurisdiction of the Commission and that no action may be taken by the Commission on off-agenda items unless authorized by law.

6. **CONSENT CALENDAR**

   a.) **September 9 – Regular Commission Meeting Minutes**
   The Commission will consider approval of the September 9, 2026 meeting minutes.

7. **PUBLIC HEARING**
   No public hearing items scheduled.

8. COMMISSION DISCUSSION AND ACTION

a.) Legislative Report (October 2026)

The Commission will receive an update on the legislative items reviewed by the Commission during the 2026 legislative cycle, recent activity by the Alliance of LAFCOs Legislative Committee, and the amicus brief.

b.) OCERS 2027-28 Contribution Rates

The Commission will consider adoption of the approved OCERS FY 2027-28 retirement contribution rates.

c.) Fiscal Year 2026-27 Quarterly Financial Report (First Quarter)

The Commission will receive the first quarter financial report for Fiscal Year 2026-27.

9. COMMISSIONER COMMENTS

This is an opportunity for Commissioners to comment on issues not listed on the agenda, provided that the subject matter is within the jurisdiction of the Commission. No discussion or action may occur or be taken except to place the item on a future agenda if approved by the Commission majority.

10. EXECUTIVE OFFICER'S REPORT

Executive Officer's announcement of upcoming events and a brief report on activities of the Executive Officer since the last meeting.

11. INFORMATIONAL ITEMS & ANNOUNCEMENTS

No informational items or announcements.

12. CLOSED SESSION

a.) PUBLIC EMPLOYEE PERFORMANCE EVALUATION
Pursuant to Government Code section 54957
Title: Executive Officer

b.) CONFERENCE WITH LABOR NEGOTIATORS
Pursuant to Government Code Section 54957.6
Agency designated representatives: Commission Chair Wendy Bucknum and William Kelly of Kelly Associates Management Group LLC
Unrepresented employee: Executive Officer

13. ADJOURNMENT OF REGULAR COMMISSION MEETING

The next Regular Commission Meeting will be held on Wednesday, November 18, 2026, at 8:15 a.m. at the County Administrative North (CAN), First Floor Multipurpose Room 101, 400 W. Civic Center Drive, Santa Ana, CA 92701.

PUBLIC PARTICIPATION:

The Local Agency Formation Commission of Orange County welcomes your participation. The public may share general comments or comments on agenda items through the following options:

1) **In-person** comments may be provided during the general comment period on off-agenda items and during the hearing of a specific agenda item. In accordance with the OC LAFCO guidelines, each speaker's comments may not exceed three (3) minutes for the respective item. If you have documents for the Commission, please bring 15 copies and submit to the Commission Clerk for distribution.

2) **Audio/Video Live Streaming:** The public may view and listen to the meeting live on YouTube using the link provided on the website homepage (www.oclafco.org). However, LAFCO cannot guarantee that the public's access will be uninterrupted, and technical difficulties may occur from time to time. The meeting will continue despite technical difficulties for participants using audio/video live streaming unless otherwise prohibited by State open meeting laws.

3) **Written** general comments or comments on specific agenda items may be submitted by email to the Commission Clerk at ccarter-benjamin@oclafco.org. Comments received no less than twenty-four (24) hours prior to the regular meeting will be distributed to the Commission and included in the record.

Pursuant to Government Code Section 54957.5, public records that relate to open session agenda items that are distributed to a majority of the Commission less than seventy-two (72) hours prior to the meeting will be made available to the public on the OC LAFCO website at www.oclafco.org.

"Pursuant to State law, a participant in an OC LAFCO proceeding who has a financial interest in a decision and who has made a campaign contribution of more than $250 to any commissioner in the past year may be required to disclose the contribution. If you are affected, please notify the Commission's staff before the hearing in order to determine whether disclosure is warranted."

AMERICANS WITH DISABILITIES ACT (ADA)

All regular meeting agendas and associated reports are available at www.oclafco.org. Any person with a disability under the Americans with Disabilities Act (ADA) may receive a copy of the agenda or associated reports upon request. Any person with a disability covered under the ADA may also request a disability-related modification or accommodation, including auxiliary aids or services, to participate in a public meeting. Requests for copies of meeting documents and accommodations shall be made with OC LAFCO staff at (714) 640-5100 at least three business days prior to the respective meeting.

2026
MEETING AND EVENTS CALENDAR

Approved November 12, 2025

January

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OC LAFCO Regular Meeting (***begins at 8:15 a.m.***)
Location: County Administrative North, First Floor Multipurpose Room 101, 400 W. Civic Center Dr., Santa Ana, CA 92701.

Office closure due to legal holidays and flexible work schedule.

No scheduled regular meeting due to legal holiday.

2026 CALAFCO Annual Conference - October 21-23, Sacramento, CA.

April 8, 2026 Regular Meeting Cancelled.
July 8, 2026 Regular Meeting Cancelled.

Agenda materials available at http://oclafco.org.

ISDOC
Independent Special Districts of Orange County

Mailing Address

18700 Ward Street, Unit B
Fountain Valley, CA 92708

Meeting Location

MWDOC/OCWD
18700 Ward Street
Fountain Valley, CA 92708

(714) 963-3058
(714) 964-5930 *fax*

www.isdoc.net

Executive Committee

President
Hon. Bob McVicker
Municipal Water District of Orange County

1st Vice President
Vacant

2nd Vice President
Hon. Marilyn Thoms
East Orange County Water District

3rd Vice President
Hon. Al Nederhood
Municipal Water District of Orange County

Secretary
Vacant

Treasurer
Hon. Saundra Jacobs
Santa Margarita Water District

Immediate Past President
Hon. Greg Mills
Serrano Water District

Staff Administration

Heather Baez
Municipal Water District of Orange County

Katie Vincent
Municipal Water District of Orange County

Executive Committee Meeting

Tuesday, October 6, 2026
7:30 a.m.

Join Zoom Meeting
https://mwdoc.zoom.us/j/83420776167

Dial by your location
669 900 9128 US (San Jose)
877 853 5247 US Toll-free
888 788 0099 US Toll-free

AGENDA

- **Welcome**
- **Approval of Minutes**
  - Approval of Minutes: September 1, 2026
- **Public Comments on items not on the agenda**
- **New Business**
  - Approve 2027 Meeting Calendar
  - 2027/2028 Executive Committee Vacancies Discussion
- **Old Business**
- **Treasurer's Report – Director Saundra Jacobs**
  - Report on accounts
- **CSDA Report – Chris Palmer**
  - Receive, discuss, and file the CSDA Report
- **LAFCO Report – Director Jim Fisler**
  - Receive, discuss, and file the LAFCO report

- **ACWA Report – Director Saundra Jacobs**
  - Receive, discuss, and file the ACWA report

- **OCCOG Report – Director Mike Scheafer**
  - Receive, discuss, and file the OCCOG report

- **California Association of Sanitation Agencies (CASA) Report – SOCWA Representative**
  - Receive, discuss, and file the CASA report

- **Subcommittee Reports**
  - Programs – Heather Baez
  - Membership – Director Thoms
  - Legislative – Director Nederhood

- **Adjourn**

Water Advisory Committee of Orange County (WACO) Virtual Meeting

Friday, October 2, 2026
7:30 a.m. – 9:00 a.m.

Zoom Meeting Link:
https://mwdoc.zoom.us/j/82792553545
(Registration not required)

……..……..

AGENDA

Welcome

- Greg Mills, Serrano Water District

Reports

- Metropolitan Water District of Southern California (MET)
- Association of California Water Agencies (ACWA)

Program

Managing and Storing Water in the Metropolitan Service Area

Speaker:
Brandon Goshi
Group Manager, Water Resource Management
Metropolitan Water District of Southern California

Agency Announcements

Adjourn

……..……..

Next WACO Meeting
Friday, November 6, 2026 at 7:30 a.m. via Zoom

Next WACO Planning Committee Meeting
Tuesday, October 20, 2026 at 7:30 a.m. via Zoom

Officers

Chair
Hon. Greg Mills
Serrano Water District

Vice Chair
Hon. Karl Seckel
Municipal Water District of Orange County

Staff Contacts

Medha Paliwal / Crystal Nettles
Orange County Water District (OCWD)
(714) 378-3200
www.ocwd.com/news-events/events/waco

Heather Baez / Jared Dawson / Katie Vincent
Municipal Water District of Orange County (MWDOC)
(714) 963-3058
www.mwdoc.com/waco

DATES TO REMEMBER
OCTOBER/NOVEMBER 2026

1. Oct 28 – 8:30 a.m. – MWDOC/OCWD Joint Planning meeting
2. Oct 29 – 11:30 a.m. – ISDOC Quarterly Luncheon
3. Oct 30 – DISTRICT OFFICE CLOSED
4. Nov 2 – 8:30 a.m. – MWDOC P&O Committee meeting
5. Nov 3 – 7:30 a.m. – ISDOC Executive meeting
6. Nov 3 – 10:00 a.m. – SOCWA Planning Committee meeting
7. Nov 4 – 8:30 a.m. – MWDOC Met Directors meeting
8. Nov 5 – 8:30 a.m. – SOCWA Board meeting
9. Nov 6 – 7:30 a.m. – WACO meeting
10. Nov 11 – VETERANS DAY - DISTRICT OFFICE CLOSED
11. Nov 12 – 8:30 a.m. – MWDOC Admin/Fin Committee meeting
12. Nov 12 – 8:30 a.m. – SOCWA Engineering meeting
13. Nov 12 – 11:30 a.m. – CAG Meeting
14. Nov 13 – DISTRICT OFFICE CLOSED
15. Nov 16 – 10:00 a.m. – Agenda Review Meeting
16. Nov 17 – 10:30 a.m. – SOCWA Finance meeting
17. Nov 17 – 12:00 p.m. – SOCAG meeting
18. Nov 18 – 8:15 a.m. – LAFCO meeting
19. Nov 18 – 8:30 a.m. – MWDOC Board meeting
20. Nov 18 – 11:30 a.m. – OCWA Luncheon
21. Nov 19 – 11:30 a.m. – Laguna Hills Chamber of Commerce State of the City
22. Nov 20 – 12:00 p.m. – Pres/VP/GM meeting
23. Nov 23 – 7:30 a.m. – Regular Finance and Engineering meeting
24. Nov 24 – 7:30 a.m. – Regular Board meeting
25. Nov 26 – THANKSGIVING DAY - DISTRICT OFFICE CLOSED
26. Nov 27 – DISTRICT OFFICE CLOSED

EL TORO WATER DISTRICT

Glossary of Water Terms

Accumulated overdraft: The amount of water necessary to be replaced in the intake area of the groundwater basin to prevent the landward movement of ocean water into the fresh groundwater body.

Acre-foot, AF: A common water industry unit of measurement. An acre-foot is 325,851 gallons, or the amount of water needed to cover one acre with water one foot deep. An acre-foot serves annual needs of two typical California families.

ACWA: Association of California Water Agencies. A statewide group based in Sacramento that actively lobbies State and Federal Government on water issues.

Advanced treatment: Additional treatment processes used to clean wastewater even further following primary and secondary treatment. Also known as tertiary treatment.

AFY: Acre-foot per year.

Alluvium: A stratified bed of sand, gravel, silt, and clay deposited by flowing water.

AMP: Allen McCulloch pipeline. Major pipeline transporting treated water to water districts between Yorba Linda, where it starts to El Toro Water District reservoir, where it terminates.

Annexation: The inclusion of land within a government agency's jurisdiction.

Annual overdraft: The quantity by which the production of water from the groundwater supplies during the water year exceeds the natural replenishment of such groundwater supplies during the same water year.

Aqueduct: A man-made canal or pipeline used to transport water.

Aquifer: An underground geologic formation of rock, soil or sediment that is naturally saturated with water; an aquifer stores groundwater.

Arid: Dry; deserts are arid places. Semi-arid places are almost as dry as a desert.

Artesian: An aquifer in which the water is under sufficient pressure to cause it to rise above the bottom of the overlying confining bed, if the opportunity is provided.

Artificial recharge: The addition of surface water to a groundwater reservoir by human activity, such as putting surface water into recharge basins. (See also: groundwater recharge and recharge basin.)

AWWA: American Water Works Association. Nationwide group of public and private water purveyors and related industrial suppliers.

Base flow: The portion of river surface flow which remains after deduction of storm flow and/or purchased imported water.

Bay-Delta: The Sacramento-San Joaquin Bay-Delta is a unique natural resource of local, state and national significance. The Delta is home to more then 500,000 people; contains 500,000 acres of agriculture; provides habitat for 700 native plant and animal species; provides water for more then 25 million Californians and 3 million acres of agriculture; is traversed by energy, communications and transportation facilities vital to the economic health of California; and supports a $400 billion economy.

BIA: Building Industry Association

Biofouling: The formation of bacteria film (biofilm) on fragile reverse osmosis membrane surfaces.

Biosolids: Solid organic matter recovered from a sewage treatment process and used especially as fertilizer.

BMP: Best Management Practice. An engineered structure or management activity, or combination of these, that eliminates or reduces adverse environmental effects.

Brackish water: A mixture of freshwater and saltwater

Brown Act: Ralph M. Brown Act enacted by the State legislature governing all meetings of legislative bodies. Also known as Open Meeting Requirements.

Canal: A ditch used to move water from one location to another.

CASA: California Association of Sanitation Agencies. The sanitation equivalent of ACWA concerned solely with issues affecting the treatment and disposal of solid waste and wastewater.

CEQA: California Environmental Quality Act.

CERCLA: Comprehensive Environmental Response, Compensation and Liability Act. This federal law establishes the Superfund program for hazardous waste sites. It provides the legal basis for the United States EPA to regulate and clean up hazardous waste sites, and if appropriate, to seek financial compensation from entities responsible for the site.

CFS: Cubic feet per second.

Chloramines: A mixture of ammonia and chlorine use to purify water.

Clarify: To make clear or pure by separation and elimination of suspended solid material.

Coagulation: The clumping together of solids so they can more easily be settled out of filtered out of water. A chemical called aluminum sulfate (alum) is generally used to aid coagulation in water treatment and reclamation.

Coastkeepers: A non-profit organization dedicated to the protection and preservation of the marine habitats and watersheds of Orange County through programs of education, restoration, enforcement and advocacy.

Colored Water: Groundwater extracted from the basin that is unsuitable for domestic use without treatment due to high color and odor exceeding drinking water standards.

Condensation: The process of water vapor (gas) changing into liquid water. An example of condensation can be seen in the tiny water droplets that form on the outside of a glass of iced tea as warmer air touches the cooler glass.

Confined aquifer: An aquifer that is bound above and below by dense layers of rock and contains water under pressure.

Conjunctive use: Storing imported water in a local aquifer, in conjunction with groundwater, for later retrieval and use.

Contaminate: To make unclean or impure by the addition of harmful substances.

CPCFA: California Pollution Control Financing Authority. State agency providing funds for wastewater reclamation projects.

Crisis:

1. A: The turning point for better or worse B. a paroxysmal attack of pain, distress, or disordered function C. an emotionally significant event or radical change of status in a person's life < a midlife crisis>
2. The decisive moment (as in a literary plot)
3. A: An unstable or crucial time or state of affairs in which a decisive change is impending; especially one with the distinct possibility of a highly undesirable outcome < a financial crisis> B. a situation that has reached a critical phase

CTP: Coastal Treatment Plant

CWPCA: California Water Pollution Control Association. A 7000-member non-profit educational organization dedicated to water pollution control.

Dam: A barrier built across a river or stream to hold water.

Decompose: To separate into simpler compounds, substances or elements.

Deep percolation: The percolation of surface water through the ground beyond the lower limit of the root zone of plants into a groundwater aquifer.

Degraded water: Water within the groundwater basin that, in one characteristic or another, does not meet primary drinking water standards.

Delta: Where the rivers empty; an outlet from land to ocean, also where the rivers deposit sediment they carry forming landforms.

Delta Vision: Delta Vision is intended to identify a strategy for managing the Sacramento- San Joaquin Delta as a sustainable ecosystem that would continue to support environmental and economic functions that are critical to the people of California.
Demineralize: To reduce the concentrations of minerals from water by ion exchange, distillation, electro-dialysis, or reverse osmosis.

De-nitrification: The physical process of removing nitrate from water through reverse osmosis, microfiltration, or other means.

Desalting (or desalination): Removing salts from salt water by evaporation or distillation. Specific treatment process, such as reverse osmosis or multi-stage flash distillation, to demineralize seawater or brackish (saline) waters for reuse. Also, sometimes used in wastewater treatment to remove salts other pollutants.

Desilting: The physical process of removing suspended particles from water.

Dilute: To lessen the amount of a substance in water by adding more water

Disinfection: Water treatment which destroys potentially harmful bacteria.

Drainage basin: The area of land from which water drains into a river, for example, the Sacramento River Basin, in which all land area drains into the Sacramento River. Also called catchment area, watershed, or river basin.

Drought: A prolonged period of below- average precipitation.

DPHS: California Department of Pubic Health Services. Regulates public water systems; oversees water recycling projects; permits water treatment devices; certifies drinking water treatment and distribution operators; supports and promotes water system security; provides support for small water systems and for improving technical, managerial, and financial (TMF) capacity; provides funding opportunities for water system improvements.

DVL: Diamond Valley Lake. Metropolitan's major reservoir near Hemet, in southwestern Riverside County.

DWR: California Department of Water Resources. Guides development/management of California's water resources; owns/operates State Water Project and other water facilities.

Endangered Species: A species of animal or plant threatened with extinction.

Endangered Species Act of 1973 (ESA): The most wide-ranging of the dozens of United States environmental laws passed in the 1970's. As stated in section 2 of the act, it was designed to protect critically imperiled species from extinction as a "consequence of economic growth and development untendered by adequate concern and conservation.

Ecosystem: Where living and non-living things interact (coexist) in order to survive.

Effluent: Wastewater or other liquid, partially or completely treated or in its natural state, flowing from a treatment plant.

Evaporation: The process that changes water (liquid) into water vapor (gas).
Estuary: Where fresh water meets salt water.

Evapotranspiration: The quantity of water transpired (given off), retained in plant tissues, and evaporated from plant tissues and surrounding soil surface. Quantitively, it is expressed in terms of depth of water per unit area during a specified period of time.

FCH: Federal Clearing House – Environmental Review/Processing

FEMA: Federal Emergency Management Agency

Filtration: The process of allowing water to pass through layers of a porous material such as sand, gravel or charcoal to trap solid particles. Filtration occurs in nature when rain water soaks into the ground and it passes through hundreds of feet of sand and gravel. This same natural process of filtration is duplicated in water and wastewater treatment plants, generally using sand and coal as the filter media.

Flocculation: A chemical process involving addition of a coagulant to assist in the removal of turbidity in water.

Forebay: A reservoir or pond situated at the intake of a pumping plant or power plant to stabilize water level; also, a portion of a groundwater basin where large quantities of surface water can recharge the basin through infiltration.

Gray water reuse: Reuse, generally without treatment, of domestic type wastewater for toilet flushing, garden irrigation and other non-potable uses. Excludes water from toilets, kitchen sinks, dishwashers, or water used for washing diapers.

Green Acres Project (GAP): A 7.5 million gallons per day (MGD) water reclamation project that serves tertiary treated recycled water to irrigation and industrial users in Costa Mesa, Fountain Valley, Huntington Beach, Newport Beach, and Satna Ana.

God Squad: A seven-member committee that is officially called the “Endangered Species Committee”. Members consist of Secretary of the Interior, the Secretary of Agriculture, the Secretary of the Army, the Chairman of the Council of Economic Advisers, the Administrator of the National Oceanic and Atmospheric Administration and one individual from the affected state. The squad was established in 1978 by an amendment to the 1973 Endangered Species Act (ESA). It has only been called into action three times to deal with proposed federal agency actions that have been determined to cause “jeopardy” to any listed species.

Groundwater: Water that has percolated into natural, underground aquifers; water in the ground, not water puddled on the ground.

Groundwater basin: A groundwater reservoir defined by the overlying land surface and the underlying aquifers that contain water stored in the reservoir. Boundaries of success-ively deeper aquifers may differ and make it difficult to define the limits of the basin.

Groundwater mining: The withdrawal of water from an aquifer in excess of recharge over a period of time. If continued, the underground supply would eventually be exhausted or the water table could drop below economically feasible pumping lifts.
Groundwater overdraft: The condition of a groundwater basin in which the amount of water withdrawn by pumping exceeds the amount of water that recharges the basin over a period of years during which water supply conditions approximate average.

Groundwater recharge: The action of increasing groundwater storage by natural conditions or by human activity. See also: Artificial recharge.

Ground water replenishment system (GWRS): A joint project of the Orange County Water District and the Orange County Sanitation District that will provide up to 1000,000 acre-feet of reclaimed water annually. The high-quality water will be used to expand an existing underground seawater intrusion barrier and to replenish the groundwater basin underlying north and central Orange County.

Groundwater table: The upper surface of the zone of saturation (all pores of subsoil filled with water), except where the surface if formed by an impermeable body.

GPM: Gallons per minute.

Ground Water Replenishment System (GWRS): Orange County Water District's state of the art, highly advanced, waste-water treatment facility.

Hydrologic balance: An accounting of all water inflow to, water outflow from, and changes in water storage within a hydrologic unit over a specified period.

Hydrologic cycle: The process of water constantly circulating from the ocean, to the atmosphere, to the earth in a form of precipitation, and finally returning to the ocean.

Imported water: Water that has originated from one hydrologic region and is transferred to another hydrologic region.

Inflatable rubber dams: Designed to replace temporary sand levees that wash out during heavy storm flow, the dams hold back high-volume river flows and divert the water into the off-river system for percolation.

Influent: Water or wastewater entering a treatment plant, or a particular stage of the treatment process.

Irrigation: Applying water to crops, lawns or other plants using pumps, pipes, hoses, sprinklers, etc.

JPIA: Joint Powers Insurance Authority. A group of water agencies providing self-insurance to member of the ACWA.

LAIF: Local Agency Investment Fund. Statewide pool of surplus public agency money managed by state treasurer.

Leach: to remove components from the soil by the action of water trickling through.

MAF: Million-acre feet.

MCL: Maximum contaminant level set by EPA for a regulated substance in drinking water. According to health agencies, the maximum amount of a substance that can be present in water that's safe to drink and which looks, tastes and smells good.

MET: Metropolitan Water District of Southern California.

MGD: Million gallons per day.

Microfiltration: A physical separation process where tiny, hollow filaments members separate particles from water.

Microorganism: An animal or plant of microscopic size.

MWD: Metropolitan Water District of Southern California.

MWDOC: Municipal Water District of Orange County. Intermediate wholesaler between MWD and 27-member agencies including ETWD.

Non-point source pollution: Pollution that is so general or covers such a wide area that no single, localized source of the pollution can be identified.

NPDES: National Pollution Discharge Elimination System

OCBD: Orange County Business Council

OCEMA: Orange County Environmental Management Agency

OCWD: Orange County Water District

Opportunity:
1. A favorable juncture of circumstances
2. A good chance for advancement or progress

Organism: Any individual form of life, such as a plant, animal or bacterium

PCM: Professional Community Management, Inc. Property Management company providing services to Laguna Woods Village and other homeowners associations.

Perched groundwater: Groundwater supported by a zone of material of low permeability located above an underlying main body of groundwater with which it is not hydrostatically connected.

Percolation: The downward movement of water through the soil of alluvium to the groundwater table

Permeability: The capability of soil or other geologic formations to transmit water

Point source: A specific site from which waste or polluted water is discharged into a water body, the source of which is identified. See also: non-point source.

Potable water: Suitable and safe for drinking

PPB: Parts per billion

Precipitation: Water from the atmosphere that falls to the ground as a liquid (rain) or a solid (snow, sleet, hail).

Primary treated water: First major treatment in a wastewater treatment facility, usually sedimentation but not biological oxidation.

Primary treatment: Removing solids and floating matter from wastewater using screening, skimming and sedimentation (settling by gravity).

Prior appropriation doctrine: Allocates water rights to the first party who diverts water from its natural source and applies the water to beneficial use. If at some point the first appropriator fails to use the water beneficially, another person may appropriate the water and gain rights to the water. The central principle is beneficial use, not land ownership.

Pumping Plant: A facility that lifts water up and over hills.

Recharge: The physical process where water naturally percolates or sinks into a groundwater basin.

Recharge basin: A surface facility, often a large pond, used to increase the infiltration of surface water into a groundwater basin.

Reclaimed wastewater: Wastewater that becomes suitable for a specific beneficial use as a result of treatment. See also: wastewater reclamation.

Reclamation project: A project where water is obtained from a sanitary district or system and which undergoes additional treatment for a variety of uses, including landscape irrigation, industrial uses, and groundwater recharge.

Recycling: A type of reuse, usually involving running a supply of water through a closed system again and again. Legislation in 1991 legally equates the term “recycled water” to reclaimed water.

Reservoir: A place where water is stored until it is needed. A reservoir can be an open lake or an enclosed storage tank.

Reverse osmosis: (RO) A method of removing salts or other ions from water by forcing water through a semi-permeable membrane.

RFP: Request for Proposal

Riparian: Of or on the banks of a stream, river, or other body of water.

RO: Reverse osmosis. See the listing under “reverse osmosis.”

R-O-W: Right-of-way

Runoff: Liquid water that travels over the surface of the Earth, moving downward due to gravity. Runoff is one way in which water that falls as precipitation returns to the ocean.

RWQCB: Regional Water Quality Control Board. State agency regulating discharge and use of recycled water.

Safe Drinking Water Act (SDWA): The Safe Drinking Water Act (SDWA) was originally passed by Congress in 1974 to protect public health by regulating the nation's public drinking water supply. The law was amended in 1986 and 1996 and requires many actions to protect drinking water and its sources: rivers, lakes reservoirs, springs, and ground water wells. (SDWA does not regulate private wells which serve fewer than 25 individuals.) SDWA authorizes the United States Environmental Protection Agency (US EPA) to set national health-based standards for drinking water to protect against both naturally-occurring and man-made contaminants that may be found in drinking water. US EPA, states, and water systems work together to make sure that these standards are met.

Safe yield: The maximum quantity of water that can be withdrawn from a groundwater basin over a long period of time without developing a condition of overdraft, sometimes referred to as sustained yield.

SAFRA: Santa Ana River Flood Protection Agency

Salinity: Generally, the concentration of mineral salts dissolved in water. Salinity may be measured by weight (total dissolved solids – TDS), electrical conductivity, or osmotic pressure. Where seawater is known to be the major source of salt, salinity is often used to refer to the concentration of chlorides in the water.

SAWPA: Santa Ana Watershed Project Authority.

SCADA: Supervisory Control and Data Acquisition

SCAP: Southern California Alliance of Publicity. Newly formed group of public agencies seeking reasonable regulation of sewer industry.

SCH: State Clearing House – Environmental Review/Processing

Seasonal Storage: A three-part program offered by Metropolitan Water District of Southern California:

> STSS (Short Term Seasonal Storage): financially encourages agencies with local groundwater production capabilities to produce a higher percentage of their demand in the summer from their local groundwater supplies, thus shifting a portion of their demand on the MWD system from the summer to winter;
>
> LTSS (Long Term Seasonal Storage): Financially encourages retail agencies to take and store additional amounts of MWD water above their normal annual demands for later use; Replenishment Water provides less expensive interruptible water that is generally available and used to increase the operating yield of groundwater basins.

Seawater intrusion: The movement of salt water into a body of fresh water. It can occur in either surface water or groundwater basins.

Seawater barrier: A physical facility or method of operation designed to prevent the intrusion of salt water into a body of freshwater.

Secondary treatment: The biological portion of wastewater treatment which uses the activated sludge process to further clean wastewater after primary treatment. Generally, a level of treatment that produces 85 percent removal efficiencies for biological oxygen demand and suspended solids. Usually carried out through the use of trickling filters or by the activated sludge process.

Sedimentation: The settling of solids in a body of water using gravity.

Settle: To clarify water by causing impurities/solid material to sink to a container's bottom.

Sewer: The system of pipes that carries wastewater from homes and businesses to a treatment plant or reclamation plant. Sewers are separate from storm drains, which is a system of drains and pipes that carry rain water from urban streets back to the ocean. Overwatering your yard can also cause water to run into the streets and into storm drains. Storm drain water is not treated before it is discharged.

SigAlert: Any unplanned event that causes the closing of one lane of traffic for 30 minutes or more, as opposed to a planned event, like the road construction, which is planned.

SJBA: San Juan Basin Authority

Sludge: The solids that remain after wastewater treatment. This material is separated from the cleaned water, treated and composted into fertilizer. Also called biosolids.

SOCWA: South Orange County Wastewater Authority. Regional Joint Powers Authority form for collection and treatment of sewerage (previously known as AWMA/SERRA/SOCRA). SOCWA member agencies:

CSC – City of San Clemente
CSJC – City of San Juan Capistrano
CLB – City of Laguna Beach
ETWD – El Toro Water District
EBSD – Emerald Bay Service District
IRWD – Irvine Ranch Water District
MNWD – Moulton Niguel Water District
SCWD – South Coast Water District
SMWD – Santa Margarita Water District
TCWD – Trabuco Canyon Water District

SRF: State Revolving Fund

Storm Drain: The system of pipes that carries rain water from urban streets back to the ocean. Overwatering your yard can also cause water to run into the streets and into storm drains. Storm drain water is not treated before it is discharged. Storm drains are separate from sewers, which is a separate system of pipes to carry wastewater from homes and businesses to a treatment plant or reclamation plant for cleaning.

Storm flow: Surface flow originating from precipitation and run-off which has not percolated to an underground basin.

SWP: State Water Project. An aqueduct system that delivers water from Northern California to central and Southern California.

SWRCB: State Water Resources Control Board

TDS: Total dissolved solids. A quantitative measure of the residual minerals dissolved in water that remain after evaporation of a solution. Usually expressed in milligrams per liter.

Tertiary treatment: The treatment of wastewater beyond the secondary or biological stage. Normally implies the removal of nutrients, such as phosphorous and nitrogen, and a high percentage of suspended solids.

THM: Trihalomethanes. Any of several synthetic organic compounds formed when chlorine or bromine combine with organic materials in water.

TMA: Too many acronyms.

TMDL: Total maximum daily load; a quantitative assessment of water quality problems, contributing sources, and load reductions or control actions needed to restore and protect bodies of water.

Transpiration: The process in which plant tissues give off water vapor to the atmosphere as an essential physiological process.

Turbidity: Thick of opaque with matter in suspension; muddy water

Ultraviolet light disinfection: A disinfection method for water that has received either secondary or tertiary treatment used as an alternative to chlorination.

VE: Value Engineering

VOC: Volatile organic compound; a chemical compound that evaporates readily at room temperature and contains carbon.

Wastewater: Water that has been previously used by a municipality, industry or agriculture and has suffered a loss of quality as a result.

Water Cycle: The continuous process of surface water (puddles, lakes, oceans) evaporating from the sun's heat to become water vapor (gas) in the atmosphere. Water condenses into clouds and then falls back to earth as rain or snow (precipitation). Some precipitation soaks into the ground (percolation) to replenish groundwater supplies in underground aquifers.

Water rights: A legally protected right to take possession of water occurring in a natural waterway and to divert that water for beneficial use.

Water-use Efficiency: The water requirements of a particular device, fixture, appliance, process, piece of equipment, or activity.

Water year (USGS): The period between October 1st of one calendar year to September 30th of the following calendar year.

Watermaster: A court appointed person(s) that has specific responsibilities to carry out court decisions pertaining to a river system or watershed.

Water Reclamation: The treatment of wastewater to make it suitable for a beneficial reuse, such as landscape irrigation. Also called water recycling.

Watershed: The total land area that from which water drains or flows to a river, stream, lake or other body of water.

Water table: The top level of water stored underground.

WEF: Water Environment Federation. Formerly – Water Pollution Control Federation (WPCF). International trade group advising members of sewage treatment techniques and their effect on the environment.

Weir box: A device to measure/control surface water flows in streams or between ponds.

Wellhead treatment: Water quality treatment of water being produced at the well site.

Wetland: Any area in which the water table stands near, at, or above the land surface for a portion of the year. Wetlands are characterized by plants adapted to wet soil conditions.

Xeriscape: Landscaping that requires minimal water.