



## **BOARD OF SUPERVISORS**

Michael Sanchez, Vice Chair 1<sup>st</sup> District  
Kevin Goss, 2<sup>nd</sup> District  
Sharon Thrall, 3<sup>rd</sup> District  
Lori Simpson, 4<sup>th</sup> District  
Jeff Engel, Chair 5<sup>th</sup> District

**AGENDA FOR REGULAR MEETING OF OCTOBER 16, 2018 TO BE HELD AT 10:00 A.M.  
IN THE BOARD OF SUPERVISORS ROOM 308, COURTHOUSE, QUINCY, CALIFORNIA**

**9:00 A.M. – COMMUNITY DEVELOPMENT COMMISSION**

**[www.countyofplumas.com](http://www.countyofplumas.com)**

### **AGENDA**

The Board of Supervisors welcomes you to its meetings which are regularly held on the first three Tuesdays of each month, and your interest is encouraged and appreciated.

Any item without a specified time on the agenda may be taken up at any time and in any order. Any member of the public may contact the Clerk of the Board before the meeting to request that any item be addressed as early in the day as possible, and the Board will attempt to accommodate such requests.

Any person desiring to address the Board shall first secure permission of the presiding officer. For noticed public hearings, speaker cards are provided so that individuals can bring to the attention of the presiding officer their desire to speak on a particular agenda item.

Any public comments made during a regular Board meeting will be recorded. The Clerk will not interpret any public comments for inclusion in the written public record. Members of the public may submit their comments in writing to be included in the public record.

**CONSENT AGENDA:** These matters include routine financial and administrative actions. All items on the consent calendar will be voted on at some time during the meeting under "Consent Agenda." If you wish to have an item removed from the Consent Agenda, you may do so by addressing the Chairperson.



**REASONABLE ACCOMMODATIONS:** In compliance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting please contact the Clerk of the Board at (530) 283-6170. Notification 72 hours prior to the meeting will enable the County to make reasonable arrangements to ensure accessibility. Auxiliary aids and services are available for people with disabilities.



## **STANDING ORDERS**

10:00 A.M. **CALL TO ORDER/ROLL CALL**

### **PLEDGE OF ALLEGIANCE**

### **ADDITIONS TO OR DELETIONS FROM THE AGENDA**

### **PUBLIC COMMENT OPPORTUNITY**

Matters under the jurisdiction of the Board, and not on the posted agenda, may be addressed by the general public at the beginning of the regular agenda and any off-agenda matters before the Board for consideration. However, California law prohibits the Board from taking action on any matter which is not on the posted agenda unless it is determined to be an urgency item by the Board of Supervisors. Any member of the public wishing to address the Board during the "Public Comment" period will be limited to a maximum of 3 minutes.

### **DEPARTMENT HEAD ANNOUNCEMENTS/REPORTS**

Brief announcements by, or brief reports on their activities by County Department Heads

## **ACTION AGENDA**

### **1. CONSENT AGENDA**

These items are expected to be routine and non-controversial. The Board of Supervisors will act upon them at one time without discussion. Any Board members, staff member or interested party may request that an item be removed from the consent agenda for discussion. Additional budget appropriations and/or allocations from reserves will require a four/fifths roll call vote.

#### **A) PUBLIC HEALTH AGENCY**

Adopt **RESOLUTION** authorizing Execution of the Certifications and Assurances for the California State of Good Repair Program; and authorize the Director of Public Health to sign various certifications and assurances; approved as to form by County Counsel

#### **B) SHERIFF**

- 1) Authorize the Auditor/Controller to return unspent grant funds, in the amount of \$6,382.35, for the Domestic Cannabis Eradication & Suppression Program for 2018
- 2) Authorize the Sheriff to purchase a new snowmobile, not to exceed \$13,380, from Tom's Snowmobile, Sierra City, for the Sheriff's OHV/OSV program

#### **C) PROBATION**

Authorize the Probation Department to surplus three vehicles and submit for county auction in November 2018

#### **D) FACILITY SERVICES/AIRPORTS**

- 1) Approve and authorize the Chair to sign Services Agreement, not to exceed \$10,000, between County of Plumas and Skyline Home Improvement for general roofing services; approved as to form by County Counsel
- 2) Approve and authorize the Chair to sign Services Agreement, not to exceed \$29,431, between County of Plumas and Steve's Pump and Well Drilling, Inc. for new well at Beckwourth-Nervino Airport; approved as to form by County Counsel
- 3) Approve and authorize the Chair to sign Services Agreement, not to exceed \$84,000, between County of Plumas and H.B. Restoration, Inc. to clean pressure wash, repair and paint the County Courthouse, Quincy; approved as to form by County Counsel



2. **FEATHER RIVER TOURISM ASSOCIATION** – Susan Bryner  
Report and update on formation of the Tourism Investment District
3. **DEPARTMENTAL MATTERS**
  - A) **HUMAN RESOURCES** – Nancy Selvage  
Adopt **RESOLUTION** to amend the Plumas County Job Classification Plan for Chief Deputy Public Guardian/Conservator, Range 2397, Department 20430; and authorize Social Services to recruit and fill the position. **Roll call vote**
4. **BOARD OF SUPERVISORS**
  - A. Presentation of *Resolution of Appreciation and Recognition* for Elliott Smart, Social Services Director/Public Guardian/Public Conservator, thanking him for 21 years of service to the citizens of Plumas County, and wishing him a well-deserved retirement
  - B. Correspondence
  - C. Weekly report by Board members of meetings attended, key topics, project updates, standing committees and appointed Boards and Associations
  - D. Appointments  
**PLANNING COMMISSION**  
Appoint Moorea Hoffman Stout to the Plumas County Planning Commission, representing District 2

5. **CLOSED SESSION**

**ANNOUNCE ITEMS TO BE DISCUSSED IN CLOSED SESSION**

- A. Conference with Legal Counsel: Existing litigation – Pederson, et al., v. County of Plumas, et al., United States District Court for the Eastern District of California Case No. CIV S-89-1659 JFM P, pursuant to subdivision (a) of Government Code §54956.9
- B. Conference with Legal Counsel: Initiating litigation pursuant to Subdivision (c) of Government Code Section 54956.9 (one case)
- C. Conference with Legal Counsel: Significant exposure to litigation pursuant to Subdivision (d)(2) of Government Code Section 54956.9
- D. Conference with Labor Negotiator regarding employee negotiations: Sheriff's Administrative Unit; Sheriff's Department Employees Association; Operating Engineers Local #3; Confidential Employees Unit; Probation; Unrepresented Employees and Appointed Department Heads

**REPORT OF ACTION IN CLOSED SESSION (IF APPLICABLE)**

**ADJOURNMENT**

Adjourn meeting to Wednesday, October 17, 2018, Board of Supervisors Room 308, Courthouse, Quincy, California





1A

# Plumas County Public Health Agency

Andrew Woodruff, MPH, Director

Mark Satterfield, M.D, Health Officer

270 County Hospital Road, Suite 206, Quincy, CA 95971 • (530) 283-6337 • Fax (530) 283-6425

**Date:** October 1, 2018  
**To:** Honorable Board of Supervisors  
**From:** Andrew Woodruff  
**Agenda:** Item for October 16, 2018

**Recommendation:** It is recommended that the Board of Supervisors approve the attached Resolution in order to receive State of Good Repair Program (SGR) funds from the California Department of Transportation (Department), and authorize the Director of Public Health to sign various certifications and assurances as the Board designee.

**Background Information:** As the Board is aware Plumas County Public Health Agency Senior Transportation Program is responsible for providing senior transportation services to and from the Senior Nutrition sites, and the delivery of meals to seniors who are homebound. Plumas County Senior Services has been providing services for the elderly of Plumas County for nearly twenty five years. Transportation is provided to medical and other health related appointments both in and out of Plumas County.

This funding for the State of Good Repair Program (SGR) comes through the Plumas County Transportation Commission, which has developed the project list for Fiscal Year 18/19 for the purpose of distributing SGR funds to eligible project sponsors (local agencies). Funding for this program is designated to preventive maintenance on the Senior Transportation vehicles.

County Counsel has reviewed and approved the agreement for the State Transit Assistance State of Good Repair Program Recipient Certifications and Assurances a copy is on file with the Clerk of the Board for your review.

Please contact me should you have any questions or need additional information. Thank you.



RESOLUTION # \_\_\_\_\_  
**AUTHORIZATION FOR THE EXECUTION OF THE  
CERTIFICATIONS AND ASSURANCES  
FOR THE CALIFORNIA STATE OF GOOD REPAIR PROGRAM**

**WHEREAS**, the Plumas County Public Health Agency, which operates the County Service Area #12 – Specialized Service to provide the Plumas County Senior Transportation program, is an eligible project sponsor and may receive State Transit Assistance funding from the State of Good Repair Account (SGR) now or sometime in the future for transit projects; and

**WHEREAS**, the statutes related to state-funded transit projects require a local or regional implementing agency to abide by various regulations; and

**WHEREAS**, Senate Bill 1 (2017) named the Department of Transportation (Department) as the administrative agency for the SGR; and

**WHEREAS**, the Department has developed guidelines for the purpose of administering and distributing SGR funds to eligible project sponsors (local agencies); and

**WHEREAS**, the Plumas County Transportation Commission has developed the project list for Fiscal Year 18/19 for the purpose of distributing SGR funds to eligible project sponsors (local agencies); and

**WHEREAS**, the Plumas County Public Health Agency, which operates the County Service Area #12 – Specialized Service to provide the Plumas County Senior Transportation program, wishes to delegate authorization to execute these documents and any amendments thereto to Andrew Woodruff, Plumas County Director of Public Health.

**NOW, THEREFORE, BE IT RESOLVED** by the Board of Supervisors of the County of Plumas that the fund recipient agrees to comply with all conditions and requirements set forth in the Certification and Assurances document and applicable statutes, regulations and guidelines for all SGR funded transit projects.

**NOW THEREFORE, BE IT FURTHER RESOLVED** that Andrew Woodruff, Plumas County Director of Public Health is authorized to execute all required documents of the SGR program and any Amendments thereto with the California Department of Transportation.

**The forgoing Resolution was duly passed and adopted by the Board of Supervisors of the County of Plumas, State of California, at a regular meeting of said Board held on the day of October 18, 2018, by the following vote:**

**Ayes:**

**Noes:**

**Absent:**

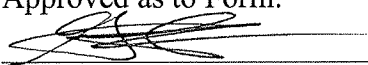
**Abstain:**

\_\_\_\_\_  
Chair, Plumas County Board of Supervisors

Attest:

\_\_\_\_\_  
Clerk, Plumas County Board of Supervisors

Approved as to Form:

 10/2/18  
\_\_\_\_\_  
Gretchen Stuhr, Deputy County Counsel III





# Office of the Sheriff


## Office of Emergency Services

1400 E. Main Street, Quincy, California 95971 • (530) 283-6375 • Fax 283-6344

GREGORY J. HAGWOOD  
SHERIFF/CORONER  
DIRECTOR

1B1

## Memorandum

**DATE:** October 3, 2018  
**TO:** Honorable Board of Supervisors  
**FROM:** Sheriff Greg Hagwood   
**RE:** Agenda Item for the meeting of October 16, 2018

### Recommended Action:

Authorize Auditor to return unspent grant funds received in advance in the amount of \$6,382.35.

### Background and Discussion:

The Sheriff's Office received a grant award from the U.S. Department of Justice (USDOJ), Drug Enforcement Administration (DEA) for the Domestic Cannabis Eradication & Suppression Program (DCESP) for 2018 in the amount of \$56,000.

The DEA advances the funding to the Sheriff's Office each year and the monies for Agreement #2018-34 were deposited into the County treasury on 03/19/18 on deposit #134493. Unfortunately, the Sheriff's Office was unable to spend all of the funds awarded under the agreement and must return the unspent balance of \$6,382.35 to the DEA.

As per the copy of the 2018 DCESP final quarterly accounting form (copy attached):

Total Amount Received: \$56,000.00

Total Expenditures: \$49,617.65 (approved by DEA)

Balance of Funds Allocated – Not Expended: \$6,382.35 (must be returned to DEA)

Please approve transfer and authorize the Auditor to process refund payment in the amount of \$6,382.35 to the DEA from 0017G 70348 524400.



**STATE/LOCAL AGENCY 2018 DCESP QUARTERLY ACCOUNTING FORM**

THIS FORM IS FOR REPORTING DEA FUNDS ONLY  
TO BE COMPLETED BY THE STATE/LOCAL AGENCY AND SUBMITTED TO THE DEA DCESP CONTRACTOR  
ALL OTHER FORMS ARE OBSOLETE

State of **California**  
LOA Number **2018-34**  
LOA Agency **PLUMAS COUNTY SHERIFF'S DEPARTMENT**  
Quarter **July thru September (FINAL)**

COPY

This final accounting form, the SF425, and refund check (if applicable) are due by October 31st. Next year's funding will not be distributed until DEA/HQ has received all documents and the refund check (if applicable).

Initial DEA Funds Allocated:

**\$56,000.00**

Amendment No. 1

Amendment No. 2

Amendment No. 3

DEA Enhancement(s):

**\$0.00**

**\$0.00**

**\$0.00**

Total Amount Received:

**\$56,000.00**

Reporting Period	Previous Cumulative	Current Quarter	Current Cumulative
Aircraft Expenses	\$10,610.00	\$37,120.00	\$47,730.00
Clothing/ Protective Gear	\$0.00	\$1,887.65	\$1,887.65
Container/ Space Rental	\$0.00	\$0.00	\$0.00
Equipment** (Not to exceed 10% of Allocation)	\$0.00	\$0.00	\$0.00
Miscellaneous Commercial Contracts	\$0.00	\$0.00	\$0.00
Overtime	\$0.00	\$0.00	\$0.00
Supplies/ Materials	\$0.00	\$0.00	\$0.00
Training	\$0.00	\$0.00	\$0.00
Travel/ Per Diem	\$0.00	\$0.00	\$0.00
Vehicle Rental	\$0.00	\$0.00	\$0.00
<b>TOTAL</b>	<b>\$10,610.00</b>	<b>\$39,007.65</b>	<b>\$49,617.65</b>

Total Expenditures to Date:

**\$49,617.65**

Balance of Funds Allocated - Not Expended:  
(Total Funds Allocated - Total Expenditures)

**\$6,382.35**

*Balance Cannot Exceed Total Amount Received*

BLUE INK ONLY

**Signature of Agency Official/Title/Date:**

Mail ORIGINAL Form to DCESP Contractor

**Signature of DEA DCESP Contractor/Date:**

**Walter McDonell**

San Francisco Division, 450 Golden Gate Avenue, San Francisco, CA 94102

\* Copy of receipts or supporting documents are REQUIRED for all expenses being claimed.

\*\* Equipment expenditures should not exceed 10% of the allocated funds. All purchases must be related to eradication or investigative efforts. Purchases of durable items require DEA Coordinator's approval and expenditures more than \$2,500.00 (singly or aggregate) require DEA/HQ approval.





GREGORY J. HAGWOOD  
SHERIFF/CORONER  
DIRECTOR

# Office of the Sheriff

## Office of Emergency Services


1400 E. Main Street, Quincy, California 95971 • (530) 283-6375 • Fax 283-6344

1B2

## Memorandum

**DATE:** October 3, 2018

**TO:** Honorable Board of Supervisors

**FROM:** Sheriff Greg Hagwood 

**RE:** Agenda Item for the meeting of October 16, 2018

### RECOMMENDATION:

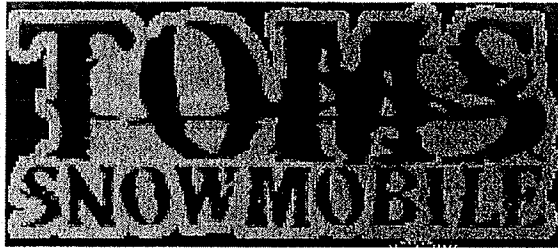
Authorize the Sheriff's Office to purchase a new snowmobile for the Sheriff's OHV/OSV program in the amount not to exceed \$13,380.00.

### BACKGROUND & DISCUSSION:

The Sheriff's Office respectfully requests authorization to purchase a new 2018 Ski-Doo snowmobile from Tom's Snowmobile in Sierra City.

The Sheriff's FY 18/19 OHV budget (dept 70384) includes the funds to purchase OHV patrol equipment. The snowmobile is not being purchased out of the County General Fund.





400 State Hwy. 49  
Sierra City, CA 96125  
(530) 862-1128

**Bill of Sale**

Date 08/09/2018 Deal # 213

Buyer: Plumas County Sheriff  
1400 E. Main Street  
East Quincy, CA 95971  
(530)394-7804

Co-Buyer:

**Major Unit:**

Stock #SKI000JD9

Model Summit SP 154 850 E-TEC SS, PowderMax Light 3.0

Year 2018

VIN# 2BPSCEJD9JV000009

Make Ski-Doo

Color Black

Mileage

Lien Holder:

**Trade-In:**

Stock #

Stock #

Year

Year

Make

Make

Model

Model

Vin #

Vin #

Mileage

Mileage

Payoff To: 1)

2)

**Other:**

Plan Name

Term

Vehicle Price: \$11,621.16

Freight: \$450.00

Set-Up: \$250.00

Trade-In: \$0.00

Other: \$0.00

Rebate/Incentives: \$0.00

**Sub-Total:** \$12,321.16

P & A Total: \$0.00

Labor Total: \$0.00

Sales Tax: \$927.84

License/Reg. Fees: \$81.00

Doc Fee: \$50.00

Tire Tax: \$0.00

Trade-In Payoff: \$0.00

Warranty: \$0.00

**Sub-Total:** \$13,380.00

Payments: \$0.00

**Balance Due:** \$13,380.00

**Amount Financed:** \$13,380.00

Buyer: \_\_\_\_\_

Date: \_\_\_\_\_

Co-Buyer: \_\_\_\_\_

Date: \_\_\_\_\_

Dealer: \_\_\_\_\_

Date: \_\_\_\_\_



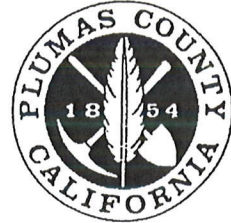


**Erin Metcalf**  
Chief Probation Officer

# County of Plumas

## Department of Probation

270 County Hospital Rd. #128,  
Quincy, California, 95971



Phone: (530)283-6200  
FAX: (530)283-6165

DATE: October 4, 2018

TO: Honorable Board of Supervisors

FROM: Erin Metcalf, Chief Probation Officer

SUBJECT: Request to approve and authorize the Probation Department to submit three vehicles for County auction.

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### Recommendation

Approve and authorize the Probation Department to surplus three vehicles and submit them for the County auction to be held in November 2018.

### Background and Discussion

The Probation Department has three 2001 vehicles with high mileage. Two of the vehicles are no longer running and one vehicle is in very poor condition. We would like to submit the three vehicles to the Public Works Department for their public auction in November 2018.

Therefore, we respectfully request the approval and authorization to submit these vehicles for the upcoming County auction.

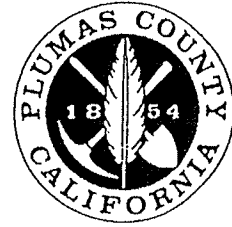




# County of Plumas

## Department of Probation

270 County Hospital Rd. #128,  
Quincy, California, 95971



**Erin Metcalf**  
Chief Probation Officer

**Phone:** 530-283-6200  
**FAX:** 530-283-6165

### Vehicles for auction

YEAR	MAKE/MODEL	VEHICLE#	MILEAGE	CAGE Y/N	V.I.N.	COND.
2001	JEEP CHEROKEE (WHITE)	J3	117,00	Y	1J4GW48S71C504694	NOT RUNNING
2001	JEEP CHEROKEE (GOLD)	J6	114,000	Y	1J4GW48S41C579952	NOT RUNNING
2001	FORD TAURUS (RED)	S1	102,000	N	1FAFP552X1G240880	Poor Condition



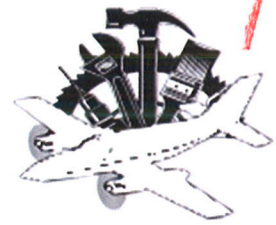


Kevin Correia  
Director

# County of Plumas

## Facility Services

198 Andy's Way  
Quincy CA 95971



Phone: 530-283-6299  
Fax: 530-283-6103

DATE: October 16, 2018

TO: Honorable Board of Supervisors

FROM: Kevin Correia – Facility Services Director

SUBJECT: Request to approve and authorize Chair Engel to sign contract between Facility Services and Skyline Home Improvement.

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### **Recommendation**

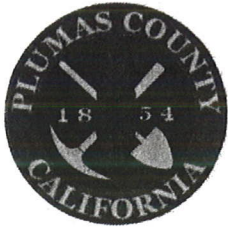
Approve and authorize Chair Engel to sign a contract between the Facility Services and Skyline Home Improvement; contract not to exceed \$10,000.

### **Background and Discussion**

Skyline Home Improvement provides roofing repair, emergency repair, maintenance, and inspection services for all types of roofs. Facility Services has requested Skyline Home Improvement to provide these services to Plumas County.

A copy of the contract is on file with the Clerk of the Board.





## DEPARTMENT OF FACILITY SERVICES & AIRPORTS

198 ANDY'S WAY, QUINCY, CALIFORNIA 95971-9645  
(530) 283-6299 FAX: (530) 283-6103

Kevin Correia  
Director

Board Meeting: October 16, 2018

To: The Honorable Board of Supervisors

From: Kevin Correia, Director

Subject: Approve and Authorize Board Chairman to sign Repair Construction Agreement Between the County and Steve's Pump and Well Drilling Inc. for drilling a new Well at Nervino Airport in Beckwourth, Ca. not to exceed \$29,431.00

---

### Background

The Well system at Nervino Airfield has been Condemed as of June 1, 2016 and is not potable unless boiled. We have been waiting to see if this was going to be covered by FEMA but it is not. The original well was drilled to a depth of 150ft. and the new well which will be right next to it will be a depth of 400ft.

### Recommendation

Approve and Authorize board chair to sign Agreement to drill the new Well at Nervino Airpor in Beckwourth, Ca. not to exceed \$29,431.00





## DEPARTMENT OF FACILITY SERVICES & AIRPORTS

198 ANDY'S WAY, QUINCY, CALIFORNIA 95971-9645  
(530) 283-6299 FAX: (530) 283-6103

Kevin Correira  
Director

Board Meeting: October 16, 2018

To: The Honorable Board of Supervisors

From: Kevin Correira, Director

Subject: Approve and Authorize Board Chairman to sign Repair Construction Agreement Between the County and H.B. Restoration Inc. for Cleaning, Pressure washing, Priming and Painting the County Courthouse not to exceed \$84,000.00

---

### Background

On September 16<sup>th</sup> 2019 the County Courthouse will be 100 years old and it has been a very long time since this building has been repaired and painted. The building will be Cleaned, pressure washed, repaired and painted.

### Recommendation

Approve and Authorize board chair to sign Agreement to clean, pressure wash, repair and paint the County Courthouse not to exceed \$84,000.00



## FEATHER RIVER TOURISM ASSOCIATION



2

October 4, 2018

To the Honorable Board of Supervisors of Plumas County,

Economic vitality is the most pressing issue for many in our community, individuals and businesses alike. During the era of logging in our forests, Plumas County had some of the best schools in the state. Our business services, restaurants, merchants, etc. thrived. Unfortunately, as with most rural communities, when logging declined, so did our services, businesses, schools, public facilities and cultural life. Today, building a thriving tourism industry is one of our hopes for the future (See Appendix 1). For a period, county funds were available to assist efforts to build our tourism industry. However, due to the many financial pressures facing county governments today, funding for tourism has disappeared.

### **Background**

Over four years ago, a group of lodging providers and business interests came together in an effort to address the need to grow our tourism industry. State travel statistics had shown that our county was losing 2% of the travel market annually to our competitors or approximately \$14 million across the 8 years of the study. Current statistics show an even greater loss of market share. (See Appendix 2, 3 & 4).

I represent the Lake Almanor area on the Steering Committee working to improve our market share of Tourism spending through the formation of a Tourism Investment District (TID) for the Lake Almanor, Indian Valley & Quincy areas. (See Map, Appendix 5). After much effort to engage the lodging providers of Eastern Plumas County they have declined the opportunity to take part.

### **What is a Tourism Investment District?**

Briefly, across California, TID districts were formed in response to the decrease in funding available for tourism marketing. A TID allows the levy of an assessment on hotel or lodging guests. The assessment is collected by the lodging provider and must be used for marketing programs and infrastructure that will improve the destination and exhibit measurable results related to lodging stays.



Funds collected by a TID are managed by a dedicated nonprofit corporation which in our case will be the Feather River Tourism Association (FRTA). Unlike Transient Occupancy Taxes and other funds from local governments, TID money cannot be diverted to government programs. And, unlike a member dues association, TID assessments are mandatory for the term, making funding much more stable. In our case, the initial term will be 5 years. It is the reliability of such funding that has made Tourism Improvement Districts a must-have for destinations in California. (See Appendix 6).

### **Where We Are Today**

It takes a lot of volunteer hours and community money to form a TID when there is no existing Visitors Bureau or County Chamber to enact it. The dedication and perseverance of our group has brought us close to our goal. We have raised \$40,000 of the \$45,000 needed for legal counsel, and put in countless hours in public presentations, meetings, forums, and one-on-one discussions to bring us to this point. We are now confident we can get the 51% (weighted vote) of our industry and move forward through the formal process and approval by County Government to form the District. Once formed, based on revenue estimates, the District will realize approximately \$288,000 in assessments in the first 12 months. By year 5, with a conservative 10% ROI, we expect to be exceeding \$400,000 annually. (See Appendix 7).

### **Request**

We request the Board of Supervisors to authorize the use of appropriate time by County Departments: Legal Counsel and County Tax Collector, to assist our legal counsel, Civitas, in acquiring the data needed to prepare documents, engage legal review of said documents, and ultimately to receive and tabulate petition data submitted by FRTA to calculate the weighted votes needed to form the district.

Information regarding these needed actions and timelines are in our Draft Management Plan (Appendix 8, page 6-17).

Thank you in advance for considering this request.

Sincerely,

Susan Bryner

Coldwell Banker Kehr/O'Brien Real Estate

Lake Almanor Representative to the Steering Committee for the Feather River Tourism Association



<b>List of Appendices</b>	<b>Page</b>
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3. Travel Spending Across California Counties	5-14
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6. Tourism Improvement Districts in California by County	17
7. California TID Matrix of Budgets, Assessment Rates & Programs	18-26
8. Feather River Tourism Investment District Draft Management Plan	27-

**Related Links below are located at [www.FeatherRiverTourism/frta-resources](http://www.FeatherRiverTourism/frta-resources)**

California Travel Impacts 2000 – 2017, Dean Runyan & Assoc. 2018

<https://storage.snappages.site/n2gem5jmxj/assets/files/Dean-Runyan-County-Impacts-2018.pdf>

The Economic Impacts of TID's in California, Civitas 2016

<https://storage.snappages.site/n2gem5jmxj/assets/files/Final-Tourism-Improvement-District-Rep-40.pdf>

Economic Impact of Tourism Investment Districts in California, Civitas 2016

<https://storage.snappages.site/n2gem5jmxj/assets/files/Final-Tourism-Improvement-District-Rep-40.pdf>

A Regional Analysis of California Travel Industry and Other Industry Sectors, 2007-2012, Dean Runyan & Assoc. 2013

<https://storage.snappages.site/n2gem5jmxj/assets/files/Dean-Runyan-Regional-Analysis.pdf>



## Appendix 1. Tourism & Destination Marketing

**Destination marketing has become a key element in plans for economic development. not only in the US but across the globe. Why? Because tourism is:**

- The 2nd fastest growing industry in the US
- 9% of global GDP
- Spending on lodging is outpacing family GDP
- 1980 – 2014 spending on lodging increased 200% while per capita income increased only 75%

To meet the growing need to compete in the destination tourism market a movement began to find sources for funding marketing needs. The Tourism Improvement District revolution began in West Hollywood, California, in 1989. The concept spread slowly at first, but picked up momentum in the late 1990s and exploded in the mid-2000s. At the current time there are 103 districts in California, 157 across the nation, with at least a dozen more in the formation process.

**In short, Tourism Improvement Districts were conceived because:**

- Travel is a top 10 industry in the 48 states including DC.
- 1 out of 9 jobs in the US depends upon travel and tourism
- Money for promotion began disappearing when local and state governments were forced to focus on public infrastructure and safety

**A Tourism Improvement District is:**

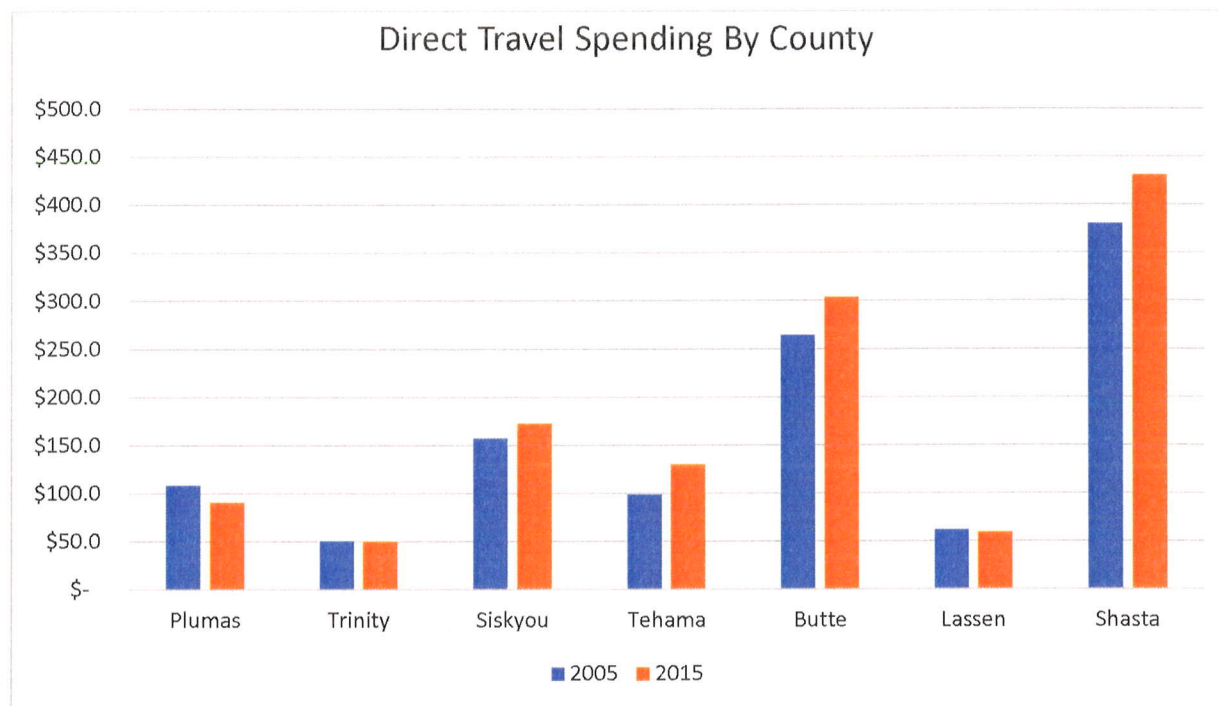
- A stable source of funding for marketing that must be spent on services and improvements that provide a specific benefit to those who pay
- Non-tax funds raised through an assessment that cannot be diverted to general government programs
- Based on % of room rate or \$ amount per occupied room per night
- Designed to increase occupancy and room stays of Lodging Providers
- Governed by those who pay
- Used to provide a wide range of services that directly benefit those who pay

**The positive effects of implementing a Tourism Investment District in a local region have been documented by over 10 years of research. And, these impacts are not just limited to tourism-related industries, but are spread across industries. What does the research show?**

- Room stays increase. The region experiences significantly increased spending on lodging, food & beverages.
- Room prices are able to be increased in proportion to the increased demand.
- The increased direct spending on lodging, food & beverages creates indirect effects that impact the supply chain, ie. increased demand for local support services
- Additional economic benefits occur when a portion of the additional income earned is spent in



## Appendix 2. Comparative Data Across 7 Northern California Counties



County	2005 Spending			2015 Spending		
	\$	\$ Millions	%	\$	\$ Millions	%
Trinity	\$	50.7	5%	\$	50.1	4%
Siskiyou	\$	157.1	14%	\$	172.7	14%
Tehama	\$	98.4	9%	\$	130.1	11%
Butte	\$	264.6	24%	\$	303.5	25%
Lassen	\$	61.9	6%	\$	59.4	5%
Shasta	\$	380.1	34%	\$	430.7	35%
Plumas	\$	108.6	10%	\$	90.4	7%
<b>Total</b>	<b>\$</b>	<b>1,121.4</b>	<b>100%</b>	<b>\$</b>	<b>1,236.9</b>	<b>100%</b>

**Total Travel Spending increased by 9% across these 7 Northern CA counties.**

**From 2005-15 Plumas County lost 3% of the market share.**

**\$37 million went to other counties in 2015**

**Data for 2016 and 2017 was not used due to Plumas County's lack of data.**



**County Direct Travel Spending, 2000-2017p**  
(\$Millions)

<b>Alameda</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	3,086	3,137	3,475	3,375	3,738	3,897	3,973	4,235	6.6%	1.9%
Visitor Spending	2,307	2,284	2,519	2,574	2,923	3,059	3,136	3,316	5.7%	2.2%
Non-transportation	1,763	1,664	1,816	1,915	2,235	2,376	2,462	2,610	6.0%	2.3%
Transportation	545	620	703	659	688	683	674	706	4.7%	1.5%
<b>Alpine</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	24	30	29	26	27	29	34	35	4.3%	2.3%
Visitor Spending	24	29	29	26	26	29	33	35	4.2%	2.3%
Non-transportation	22	27	26	23	24	26	31	32	3.6%	2.3%
Transportation	1	3	3	3	2	2	2	2	13.0%	3.1%
<b>Amador</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	83	123	121	126	131	134	141	144	2.0%	3.3%
Visitor Spending	79	116	112	118	124	129	136	138	1.5%	3.4%
Non-transportation	70	100	95	99	106	112	121	122	0.7%	3.3%
Transportation	9	16	17	19	18	16	15	17	7.7%	4.0%
<b>Butte</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	212	265	301	306	308	303	305	330	8.2%	2.6%
Visitor Spending	179	224	250	258	266	267	273	294	7.8%	3.0%
Non-transportation	149	178	193	197	210	218	227	243	6.9%	2.9%
Transportation	30	47	57	61	56	50	46	51	12.1%	3.3%
<b>Calaveras</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	111	159	174	173	179	181	188	193	2.4%	3.3%
Visitor Spending	105	150	163	163	170	173	181	185	2.0%	3.4%
Non-transportation	92	127	136	135	144	149	159	161	1.2%	3.3%
Transportation	13	22	28	28	26	24	22	24	8.1%	3.6%
<b>Colusa</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	36	41	49	48	47	46	49	51	4.4%	2.0%
Visitor Spending	34	37	44	44	43	43	46	47	3.9%	1.9%
Non-transportation	31	32	37	37	37	38	40	42	3.2%	1.8%
Transportation	4	5	7	7	6	6	5	6	9.3%	2.7%

Details may not add to totals due to rounding. Percentages represent annual change and calculated on unrounded numbers.

Historical revisions have been made on prior years based on the availability of revised source data for cities and counties throughout the state.



## County Direct Travel Spending, 2000-2017p (\$Millions)

<b>Contra Costa</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	1,144	1,344	1,512	1,521	1,641	1,608	1,713	1,787	4.3%	2.7%
Visitor Spending	971	1,133	1,252	1,259	1,403	1,384	1,504	1,558	3.6%	2.8%
Non-transportation	854	955	1,035	1,024	1,173	1,178	1,306	1,343	2.8%	2.7%
Transportation	117	178	217	235	230	206	198	215	8.8%	3.6%
<b>Del Norte</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	75	102	117	112	121	124	131	132	0.9%	3.4%
Visitor Spending	72	95	110	106	115	119	126	127	0.6%	3.4%
Non-transportation	63	79	91	87	97	103	110	110	-0.1%	3.3%
Transportation	9	16	19	18	18	16	16	17	4.9%	3.9%
<b>El Dorado</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	567	724	722	724	806	895	944	910	-3.6%	2.8%
Visitor Spending	512	683	654	656	759	851	901	862	-4.4%	3.1%
Non-transportation	468	609	572	569	673	766	822	781	-5.0%	3.1%
Transportation	44	73	82	87	86	84	79	81	2.8%	3.7%
<b>Fresno</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	868	1,120	1,239	1,302	1,348	1,353	1,372	1,429	4.1%	3.0%
Visitor Spending	728	877	959	1,026	1,082	1,103	1,134	1,167	2.9%	2.8%
Non-transportation	557	626	670	705	764	799	841	859	2.0%	2.6%
Transportation	172	252	289	322	318	304	293	308	5.2%	3.5%
<b>Glenn</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	41	50	51	54	52	42	34	37	9.4%	-0.6%
Visitor Spending	38	45	45	48	47	38	30	33	9.1%	-0.9%
Non-transportation	34	39	38	40	40	32	26	28	8.2%	-1.1%
Transportation	4	6	7	8	7	5	4	5	15.0%	0.7%
<b>Humboldt</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	257	348	375	390	412	426	432	448	3.7%	3.3%
Visitor Spending	236	311	335	352	381	397	404	417	3.3%	3.4%
Non-transportation	201	250	270	283	314	332	342	350	2.5%	3.3%
Transportation	34	61	66	69	67	65	62	67	7.7%	3.9%

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## County Direct Travel Spending, 2000-2017p (\$Millions)

<b>Imperial</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	222	278	332	340	362	359	358	374	4.5%	3.1%
Visitor Spending	205	250	294	303	330	331	332	345	3.9%	3.1%
Non-transportation	175	204	234	240	269	275	281	289	2.6%	3.0%
Transportation	30	46	61	63	61	56	51	56	10.6%	3.7%
<b>Inyo</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	148	174	189	210	232	230	240	227	-5.3%	2.5%
Visitor Spending	146	170	185	206	228	227	237	224	-5.5%	2.5%
Non-transportation	131	148	158	177	199	201	213	199	-6.4%	2.5%
Transportation	15	22	27	29	29	26	24	24	1.8%	3.0%
<b>Kern</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	826	1,142	1,374	1,471	1,510	1,517	1,408	1,498	6.4%	3.6%
Visitor Spending	740	979	1,165	1,271	1,329	1,355	1,264	1,338	5.9%	3.5%
Non-transportation	600	748	866	935	1,011	1,060	1,010	1,055	4.5%	3.4%
Transportation	139	230	298	336	318	295	254	282	11.3%	4.2%
<b>Kings</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	110	149	158	170	167	169	163	169	3.6%	2.6%
Visitor Spending	94	123	124	139	140	145	143	146	2.4%	2.6%
Non-transportation	82	103	101	112	117	124	124	125	1.4%	2.6%
Transportation	12	20	22	26	23	22	19	21	8.4%	3.2%
<b>Lake</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	122	151	169	151	155	157	158	155	-1.8%	1.4%
Visitor Spending	114	138	153	135	141	145	146	142	-2.8%	1.3%
Non-transportation	102	120	129	113	120	126	129	124	-3.9%	1.2%
Transportation	12	19	24	22	21	19	17	18	4.9%	2.3%
<b>Lassen</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	52	62	67	61	60	59	60	63	5.2%	1.1%
Visitor Spending	47	56	59	53	55	55	56	58	4.6%	1.3%
Non-transportation	42	48	50	44	46	47	49	51	3.8%	1.2%
Transportation	5	8	10	9	9	8	7	8	10.3%	2.1%

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## County Direct Travel Spending, 2000-2017p (\$Millions)

	2000	2005	2007	2011	2014	2015	2016	2017	16-17	00-17
<b>Los Angeles</b>										
Total Spending	17,444	20,915	22,886	23,584	25,769	26,809	28,012	29,219	4.3%	3.1%
Visitor Spending	13,556	16,207	17,433	18,563	20,513	21,563	22,833	23,612	3.4%	3.3%
Non-transportation	10,573	12,492	13,196	13,848	15,481	16,547	17,792	18,288	2.8%	3.3%
Transportation	2,984	3,715	4,238	4,715	5,031	5,016	5,041	5,324	5.6%	3.5%
<b>Madera</b>										
Total Spending	159	210	238	257	275	270	292	314	7.4%	4.1%
Visitor Spending	141	184	205	226	248	246	266	284	6.7%	4.2%
Non-transportation	120	150	162	178	202	205	227	240	6.0%	4.2%
Transportation	21	34	43	48	46	41	39	43	11.1%	4.3%
<b>Marin</b>										
Total Spending	566	518	632	608	690	715	731	743	1.7%	1.6%
Visitor Spending	424	386	456	456	521	544	561	578	3.1%	1.8%
Non-transportation	391	345	401	400	467	495	516	529	2.5%	1.8%
Transportation	33	40	55	55	53	49	45	50	9.1%	2.5%
<b>Mariposa</b>										
Total Spending	253	320	338	386	421	454	458	471	2.8%	3.7%
Visitor Spending	251	317	334	382	418	451	456	469	2.8%	3.7%
Non-transportation	232	288	301	343	380	415	422	433	2.5%	3.7%
Transportation	18	29	33	38	37	36	33	36	7.0%	3.9%
<b>Mendocino</b>										
Total Spending	296	340	364	348	382	401	437	456	4.4%	2.6%
Visitor Spending	285	324	344	329	366	387	424	442	4.1%	2.6%
Non-transportation	256	283	295	280	319	343	382	395	3.5%	2.6%
Transportation	28	41	49	49	47	44	42	46	9.4%	2.9%
<b>Merced</b>										
Total Spending	158	216	240	243	264	263	248	265	6.9%	3.1%
Visitor Spending	130	173	184	190	218	222	212	224	5.7%	3.3%
Non-transportation	103	130	132	132	162	171	168	175	4.1%	3.1%
Transportation	26	43	52	57	56	50	44	49	11.8%	3.7%

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# **County Direct Travel Spending, 2000-2017p** (\$Millions)

<b>Modoc</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	18	33	34	25	24	24	25	25	2.4%	2.0%
Visitor Spending	17	31	32	23	23	23	23	24	1.9%	2.0%
Non-transportation	15	26	26	18	19	20	20	20	0.9%	1.9%
Transportation	2	5	6	4	4	3	3	3	8.2%	2.5%
<b>Mono</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	312	449	407	417	474	495	548	577	5.4%	3.7%
Visitor Spending	310	447	404	414	472	492	545	574	5.4%	3.7%
Non-transportation	284	401	357	365	422	446	499	522	4.5%	3.6%
Transportation	26	46	47	49	50	46	46	53	14.7%	4.2%
<b>Monterey</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	1,939	2,031	2,189	2,274	2,602	2,695	2,752	2,849	3.5%	2.3%
Visitor Spending	1,819	1,934	2,072	2,163	2,501	2,603	2,667	2,755	3.3%	2.5%
Non-transportation	1,680	1,735	1,835	1,906	2,244	2,362	2,441	2,511	2.9%	2.4%
Transportation	139	199	237	256	257	241	226	244	8.1%	3.4%
<b>Napa</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	666	850	1,034	1,192	1,412	1,474	1,629	1,699	4.3%	5.7%
Visitor Spending	644	824	1,001	1,149	1,367	1,431	1,567	1,637	4.5%	5.6%
Non-transportation	612	772	934	1,070	1,287	1,356	1,493	1,556	4.2%	5.6%
Transportation	32	51	67	79	80	75	74	81	9.3%	5.6%
<b>Nevada</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	211	267	290	289	306	321	341	359	5.4%	3.2%
Visitor Spending	198	244	268	268	288	305	327	344	5.1%	3.3%
Non-transportation	177	209	226	225	248	268	292	305	4.5%	3.3%
Transportation	22	35	42	43	40	37	35	39	10.0%	3.5%
<b>Orange</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	7,580	9,633	10,427	9,872	11,883	12,654	13,426	13,898	3.5%	3.6%
Visitor Spending	6,154	8,232	8,864	8,473	10,397	11,187	11,914	12,337	3.5%	4.2%
Non-transportation	5,247	6,938	7,362	7,621	9,732	10,491	11,217	11,625	3.6%	4.8%
Transportation	907	1,294	1,502	852	666	696	697	711	2.1%	-1.4%

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# County Direct Travel Spending, 2000-2017p (\$Millions)

Placer	2000	2005	2007	2011	2014	2015	2016	2017	16-17	00-17
Total Spending	582	856	933	1,045	1,034	1,102	1,227	1,297	5.7%	4.8%
Visitor Spending	526	782	852	966	965	1,038	1,164	1,222	4.9%	5.1%
Non-transportation	477	690	740	834	847	926	1,054	1,101	4.4%	5.0%
Transportation	50	92	112	132	118	112	110	120	9.4%	5.3%
<b>Plumas</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	79	109	116	112	115	90	68	71	5.1%	-0.6%
Visitor Spending	76	105	111	108	112	88	65	69	4.8%	-0.6%
Non-transportation	67	90	93	91	96	75	56	58	3.7%	-0.9%
Transportation	9	15	18	18	16	13	10	11	11.3%	1.2%
<b>Riverside</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	4,209	5,332	5,992	6,469	6,952	7,189	7,507	7,960	6.0%	3.8%
Visitor Spending	3,967	4,897	5,412	5,866	6,392	6,668	7,003	7,450	6.4%	3.8%
Non-transportation	3,548	4,259	4,639	4,991	5,528	5,844	6,205	6,572	5.9%	3.7%
Transportation	419	638	773	875	864	824	798	878	10.0%	4.4%
<b>Sacramento</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	2,382	2,951	3,291	3,281	3,495	3,590	3,633	3,870	6.5%	2.9%
Visitor Spending	1,861	2,312	2,538	2,533	2,728	2,812	2,865	3,077	7.4%	3.0%
Non-transportation	1,387	1,678	1,794	1,757	1,934	2,030	2,100	2,252	7.3%	2.9%
Transportation	475	634	744	776	794	782	765	825	7.8%	3.3%
<b>San Benito</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	70	85	87	89	94	94	97	107	10.6%	2.5%
Visitor Spending	62	75	75	78	83	85	89	98	10.3%	2.7%
Non-transportation	54	62	60	62	69	72	76	84	9.8%	2.6%
Transportation	8	13	15	16	15	14	13	14	13.4%	3.4%
<b>San Bernardino</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	2,632	3,822	4,278	4,311	4,466	4,544	4,625	4,860	5.1%	3.7%
Visitor Spending	2,395	3,235	3,569	3,668	3,881	3,992	4,101	4,281	4.4%	3.5%
Non-transportation	2,086	2,611	2,822	2,900	3,137	3,285	3,430	3,558	3.7%	3.2%
Transportation	309	624	747	768	744	707	671	723	7.7%	5.1%

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\* Dean Runyan did not receive Plumas County TOT data for 2016 + 2017. 10



## County Direct Travel Spending, 2000-2017p (\$Millions)

<b>San Diego</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	9,741	11,830	13,370	11,443	12,020	12,363	13,034	13,772	5.7%	2.1%
Visitor Spending	8,650	10,550	11,865	9,969	10,542	10,881	11,504	12,149	5.6%	2.0%
Non-transportation	7,352	8,841	9,814	8,550	9,285	9,634	10,267	10,817	5.3%	2.3%
Transportation	1,298	1,709	2,050	1,419	1,257	1,247	1,237	1,332	7.7%	0.2%
<b>San Francisco</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	7,878	7,607	8,748	9,531	12,269	12,992	13,191	13,382	1.4%	3.2%
Visitor Spending	6,446	6,157	7,199	8,159	10,267	10,894	10,873	10,749	-1.1%	3.1%
Non-transportation	5,404	5,167	5,990	6,636	8,451	9,065	9,099	8,954	-1.6%	3.0%
Transportation	1,042	990	1,209	1,523	1,816	1,829	1,774	1,795	1.2%	3.3%
<b>San Joaquin</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	498	659	742	786	809	815	832	883	6.1%	3.4%
Visitor Spending	389	537	585	636	676	695	726	763	5.1%	4.0%
Non-transportation	307	404	423	452	501	533	571	595	4.1%	4.0%
Transportation	82	134	162	184	175	163	154	168	8.9%	4.3%
<b>San Luis Obispo</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	931	1,198	1,377	1,459	1,629	1,664	1,675	1,747	4.3%	3.8%
Visitor Spending	890	1,121	1,288	1,379	1,562	1,603	1,618	1,682	3.9%	3.8%
Non-transportation	796	965	1,090	1,171	1,354	1,409	1,439	1,485	3.2%	3.7%
Transportation	94	156	198	207	208	194	179	197	10.0%	4.4%
<b>San Mateo</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	2,669	2,331	2,707	3,066	3,519	3,729	3,810	3,948	3.6%	2.3%
Visitor Spending	2,260	2,089	2,413	2,778	3,258	3,426	3,516	3,612	2.7%	2.8%
Non-transportation	1,842	1,676	1,919	2,193	2,613	2,784	2,877	2,943	2.3%	2.8%
Transportation	418	413	494	586	645	642	639	669	4.7%	2.8%
<b>Santa Barbara</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	1,280	1,504	1,629	1,691	1,853	1,900	1,897	1,943	2.4%	2.5%
Visitor Spending	1,190	1,363	1,476	1,547	1,714	1,768	1,768	1,808	2.3%	2.5%
Non-transportation	1,050	1,148	1,239	1,293	1,460	1,530	1,549	1,572	1.5%	2.4%
Transportation	141	215	237	254	254	238	219	236	7.6%	3.1%

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# County Direct Travel Spending, 2000-2017p (\$Millions)

<b>Santa Clara</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	4,452	4,161	4,702	4,927	5,769	6,091	6,303	7,338	16.4%	3.0%
Visitor Spending	3,481	3,393	3,843	4,070	4,794	5,042	5,219	6,135	17.6%	3.4%
Non-transportation	2,878	2,721	3,061	3,231	3,915	4,180	4,374	5,169	18.2%	3.5%
Transportation	603	672	782	839	879	862	845	966	14.3%	2.8%
<b>Santa Cruz</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	614	756	825	837	904	927	945	997	5.6%	2.9%
Visitor Spending	561	695	754	776	849	879	902	950	5.3%	3.1%
Non-transportation	498	597	634	652	733	773	805	843	4.6%	3.1%
Transportation	63	98	120	125	116	106	97	108	11.0%	3.3%
<b>Shasta</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	301	380	418	419	430	431	442	463	4.7%	2.6%
Visitor Spending	275	344	372	377	395	399	412	430	4.3%	2.7%
Non-transportation	236	282	298	301	324	333	351	363	3.5%	2.6%
Transportation	39	62	74	77	72	66	62	67	9.3%	3.2%
<b>Sierra</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	15	16	18	18	18	18	17	17	-0.2%	0.7%
Visitor Spending	15	15	17	17	18	17	16	16	-0.6%	0.7%
Non-transportation	13	14	15	15	16	15	15	15	-1.2%	0.6%
Transportation	1	2	2	2	2	2	2	2	5.8%	1.3%
<b>Siskiyou</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	131	157	170	167	170	173	175	186	5.9%	2.1%
Visitor Spending	124	149	160	157	162	166	169	179	5.6%	2.2%
Non-transportation	111	129	136	133	140	146	151	158	5.0%	2.1%
Transportation	13	20	24	25	22	20	18	20	10.8%	2.6%
<b>Solano</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	508	605	665	665	711	711	737	756	2.7%	2.4%
Visitor Spending	453	529	571	576	633	638	672	683	1.7%	2.4%
Non-transportation	409	465	492	492	554	567	605	611	1.1%	2.4%
Transportation	44	64	78	84	79	71	67	72	7.4%	2.9%

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## County Direct Travel Spending, 2000-2017p (\$Millions)

<b>Sonoma</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	1,059	1,236	1,439	1,593	1,828	1,891	2,051	2,099	2.4%	4.1%
Visitor Spending	939	1,122	1,296	1,464	1,698	1,767	1,908	1,941	1.7%	4.4%
Non-transportation	861	1,008	1,153	1,294	1,522	1,601	1,746	1,768	1.2%	4.3%
Transportation	78	114	143	170	176	165	162	173	7.3%	4.8%
<b>Stanislaus</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	377	510	560	553	547	561	567	593	4.7%	2.7%
Visitor Spending	296	375	410	438	450	474	490	506	3.4%	3.2%
Non-transportation	236	284	299	315	337	367	389	399	2.3%	3.1%
Transportation	59	92	110	123	113	107	100	108	7.4%	3.6%
<b>Sutter</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	56	77	95	94	92	90	89	96	8.5%	3.2%
Visitor Spending	47	61	74	74	74	75	75	81	7.9%	3.3%
Non-transportation	38	47	55	54	57	59	61	65	7.0%	3.2%
Transportation	9	14	19	20	18	16	15	16	11.8%	3.7%
<b>Tehama</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	79	98	112	116	127	130	130	136	4.1%	3.2%
Visitor Spending	73	88	98	103	116	120	122	126	3.4%	3.3%
Non-transportation	64	74	81	84	97	103	106	109	2.5%	3.2%
Transportation	9	14	17	19	19	18	16	18	9.4%	3.9%
<b>Trinity</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	39	51	53	54	52	50	53	55	4.6%	2.0%
Visitor Spending	38	48	50	52	50	48	51	53	4.4%	2.1%
Non-transportation	33	41	41	42	41	41	44	46	3.6%	2.0%
Transportation	5	8	9	9	8	7	7	7	10.0%	2.5%
<b>Tulare</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	256	356	409	435	453	423	387	420	8.5%	3.0%
Visitor Spending	209	279	310	337	369	348	321	345	7.6%	3.0%
Non-transportation	174	221	238	256	292	282	263	280	6.4%	2.9%
Transportation	36	58	72	81	77	66	58	65	13.1%	3.6%

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# County Direct Travel Spending, 2000-2017p

(\$Millions)

<b>Tuolumne</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	137	161	173	187	192	206	224	253	13.0%	3.7%
Visitor Spending	129	150	160	175	182	197	216	244	13.0%	3.8%
Non-transportation	115	130	136	148	157	174	194	218	12.8%	3.8%
Transportation	14	20	24	27	25	23	22	26	15.2%	3.7%
<b>Ventura</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	1,110	1,302	1,417	1,485	1,593	1,622	1,632	1,652	1.2%	2.4%
Visitor Spending	958	1,109	1,184	1,256	1,381	1,425	1,449	1,453	0.3%	2.5%
Non-transportation	824	923	968	1,017	1,146	1,205	1,245	1,238	-0.5%	2.4%
Transportation	134	186	216	239	235	220	204	215	5.1%	2.8%
<b>Yolo</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	209	293	319	347	359	356	355	386	8.7%	3.7%
Visitor Spending	181	259	274	303	320	322	324	351	8.3%	4.0%
Non-transportation	156	217	225	246	267	273	281	302	7.5%	3.9%
Transportation	24	42	50	58	53	48	44	50	13.3%	4.3%
<b>Yuba</b>	<b>2000</b>	<b>2005</b>	<b>2007</b>	<b>2011</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>16-17</b>	<b>00-17</b>
Total Spending	52	76	84	94	86	79	78	84	8.4%	2.8%
Visitor Spending	45	64	68	79	73	67	67	72	7.5%	2.8%
Non-transportation	37	49	51	58	55	52	53	56	5.8%	2.5%
Transportation	9	15	17	21	18	16	14	16	13.8%	3.7%

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Appendix 4

PLUMAS COUNTY  
Travel Impacts, 2000-2017p

**Total Direct Travel Spending (\$Million)**

	2000	2005	2007	2011	2014	2015	2016	2017
Destination Spending	76.1	104.7	111.1	108.4	112.1	87.6	65.4	68.5
Other Travel*	2.6	4.0	4.7	4.0	3.3	2.8	2.5	2.8
Total	78.6	108.6	115.9	112.5	115.3	90.4	67.9	71.4

**Visitor Spending by Type of Traveler Accommodation (\$Million)**

	2000	2005	2007	2011	2014	2015	2016	2017
Hotel, Motel	23.2	38.8	38.5	39.1	42.3	21.4	0.9	0.9
Campground	13.4	18.2	21.3	18.3	20.8	20.6	20.8	21.8
Private Home	8.7	9.9	10.7	11.2	10.2	9.9	0.0	10.6
Vacation Home	17.2	20.8	22.5	22.6	21.2	21.2	21.5	22.3
Day Travel	13.5	16.9	18.1	17.2	17.6	14.6	12.2	12.9
Total	76.1	104.7	111.1	108.4	112.1	87.6	65.4	68.5

**Visitor Spending By Commodity Purchased (\$Million)**

	2000	2005	2007	2011	2014	2015	2016	2017
Accommodations	17.0	24.5	25.9	25.0	27.4	20.2	12.9	13.3
Food Service	20.2	28.2	29.4	30.4	31.5	24.9	18.8	19.9
Food Stores	5.7	7.4	8.1	7.6	8.2	7.9	7.5	7.6
Local Tran. & Gas	8.8	14.7	17.9	17.5	16.2	12.5	9.7	10.8
Arts, Ent. & Rec.	14.4	17.8	17.9	16.6	17.2	13.6	10.5	10.9
Retail Sales	10.0	12.0	11.9	11.4	11.6	8.6	5.9	6.1
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	76.1	104.7	111.1	108.4	112.1	87.6	65.4	68.5

**Industry Earnings Generated by Travel Spending (\$Million)**

	2000	2005	2007	2011	2014	2015	2016	2017
Accom. & Food Serv.	14.0	21.4	23.4	22.7	26.2	19.9	14.0	14.9
Arts, Ent. & Rec.	3.5	4.8	5.3	4.9	5.4	4.4	3.4	2.5
Retail**	2.5	3.3	3.5	2.9	3.2	2.8	2.4	2.6
Ground Tran.	0.9	1.1	1.2	1.2	1.3	1.1	1.0	1.1
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.3	0.3	0.2	0.1	0.1	0.1	0.1	0.1
Total	21.1	30.8	33.6	31.8	36.2	28.3	20.8	21.3

**Industry Employment Generated by Travel Spending (Jobs)**

	2000	2005	2007	2011	2014	2015	2016	2017
Accom. & Food Serv.	840	1,020	950	880	900	690	460	480
Arts, Ent. & Rec.	180	210	210	160	190	140	110	80
Retail **	140	170	160	130	120	100	90	100
Ground Tran	30	30	40	30	40	30	20	20
Visitor Air Tran	0	0	0	0	0	0	0	0
Other Travel *	20	20	10	10	10	10	10	10
Total	1,200	1,460	1,370	1,210	1,250	970	690	690

**Tax Receipts Generated by Travel Spending (\$Million)**

	2000	2005	2007	2011	2014	2015	2016	2017
Local Tax Receipts	1.8	2.6	3.0	2.9	3.2	2.2	1.3	1.3
Loc. Visitor	1.2	1.8	1.8	1.8	2.0	1.3	0.7	0.7
Loc. Business or Emp.	0.6	0.9	1.2	1.1	1.1	0.9	0.6	0.6
State Tax Receipts	3.5	5.0	5.4	5.4	5.4	4.3	3.2	3.3
St. Visitor	2.7	3.9	4.2	4.2	4.1	3.3	2.5	2.6
St. Business or Emp.	0.8	1.1	1.2	1.1	1.3	1.0	0.7	0.7
Local & State Tax Receipts	5.3	7.6	8.4	8.3	8.6	6.5	4.5	4.6

Details may not add to total due to rounding \* Other Travel includes ground transportation and air travel impacts for travel to other California visitor destinations and travel arrangement services \*\* Retail includes gasoline Local tax receipts include transient occupancy taxes, sales taxes, and airport passenger facility charges paid by visitors, and the property tax payments and sales tax payments attributable to the travel industry income of employees and businesses. State tax receipts include sales tax payments and motor fuel tax payments of visitors, and the income tax payments and sales tax payments attributable to the travel industry income of employees and businesses

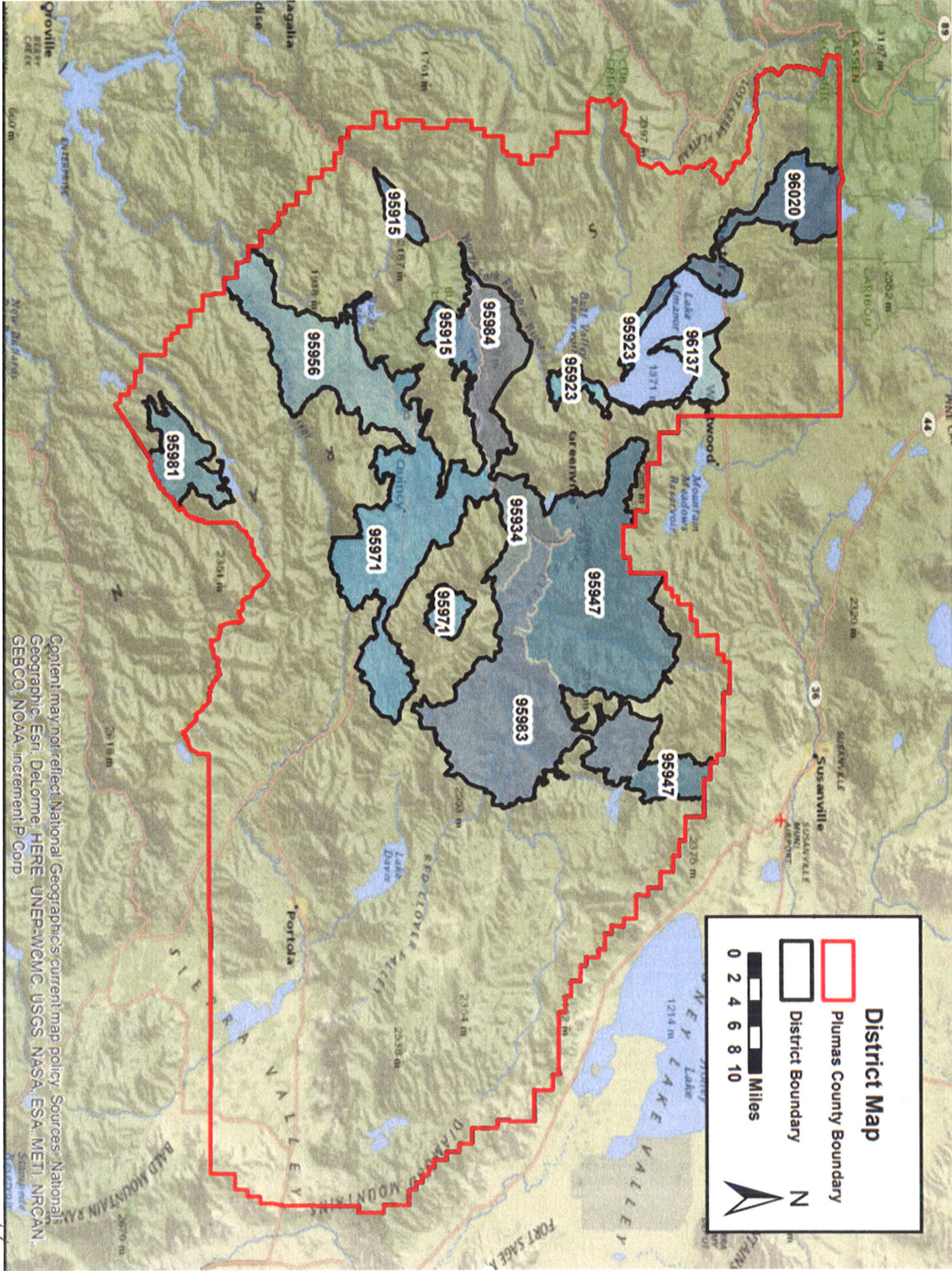
Historical revisions have been made on prior years based on the availability of revised source data for cities and counties throughout the state. Economic impacts are based on visitor trips which are defined as trips taken by individuals that stay overnight away from home, or travel more than 50 miles one-way on a non-routine trip, as defined by the California Tourism Marketing Act.

\* Dean Runyan did not receive Plumas County  
TOT Data for 2016 & 2017

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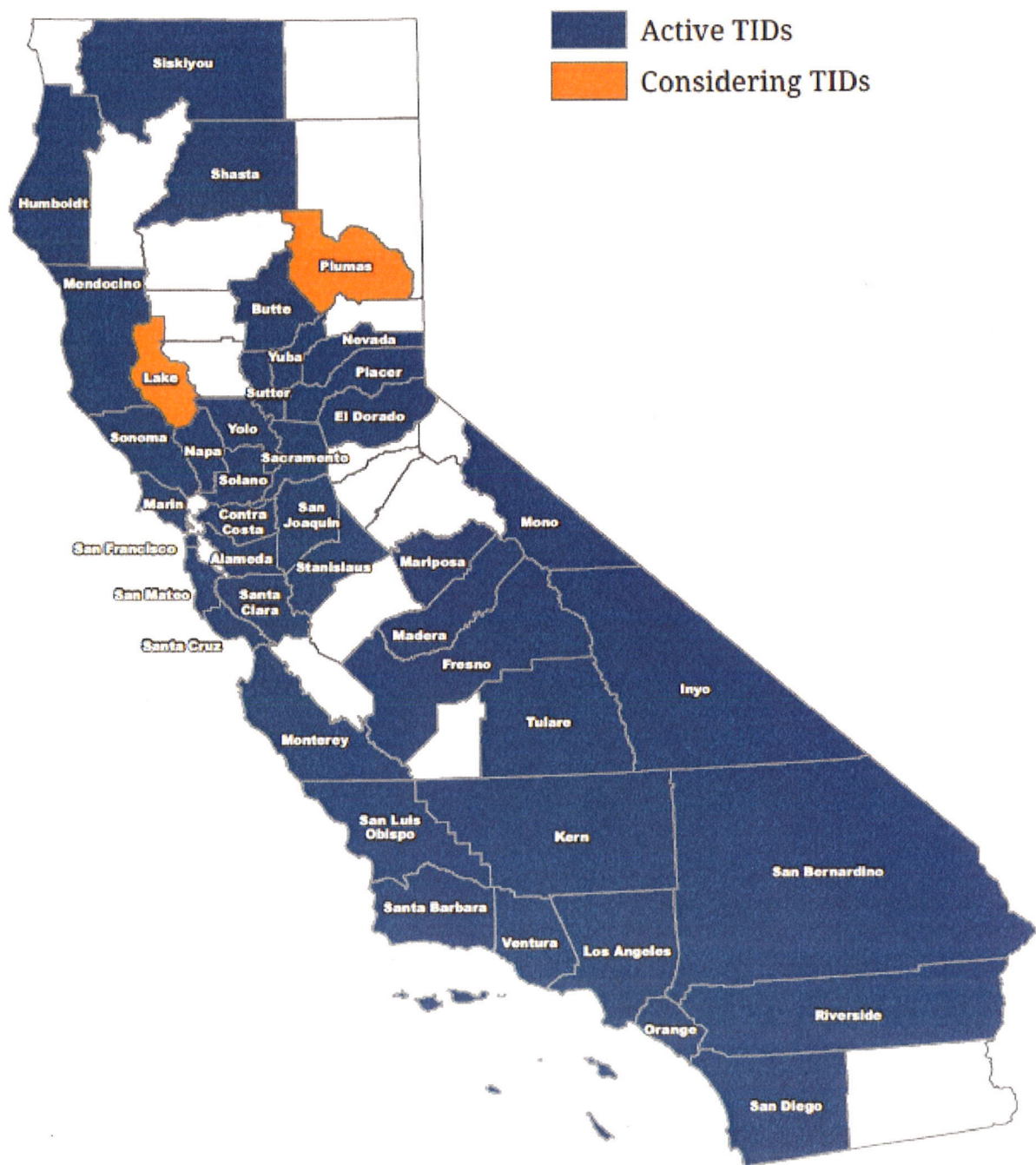


Appendix 5. Proposed District Map for FRTID

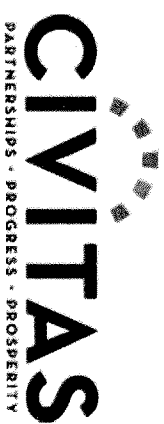




# Tourism Improvement Districts As of February 14, 2018







## California Tourism Improvement Districts

District	Annual Budget	Assessment Rates	Programs Funded	Year Approved	Enabling Statute	Other Guest Levies
<b>Anaheim</b>	\$17,500,000	2% room revenue	Tourism Marketing / Transport	2010	Local Ordinance (94)	15.20%
<b>Arroyo Grande</b>	\$195,000	2% room revenue	Tourism Marketing	2013	89 Law	10.20%
<b>Atascadero</b>	\$275,000	2% room revenue	Tourism Marketing	2013	89 Law	10.20%
<b>Berkeley</b>	\$676,606	1% room revenue	Tourism Marketing	2012	94 Law	12.20%
<b>Big Bear Lake</b>	\$1,780,000	3% room revenue + 2% ski resort	Tourism Marketing	2016	94 Law	8.20%
<b>Bishop</b>	\$395,000	2% room revenue	Tourism Marketing	2014	94 Law	12.20%
<b>Buena Park</b>	\$925,000	2% room revenue	Tourism Marketing	2016	94 Law	12.20%
<b>Burbank</b>	\$789,000	1% room revenue	Tourism Marketing and Destination Development	2011	94 Law	10.20%
<b>Butte County</b>	\$650,000	2% room revenue	Tourism Marketing	2015	94 Law	10.20%



District	Annual Budget	Assessment Rates	Programs Funded	Year Approved	Enabling Statute	Other Guest Levies
<b>Camarillo</b>	\$550,000	2% room revenue	Tourism Marketing	2014	94 Law	9.20%
<b>Carlsbad</b>	\$1,160,000	\$1.00 per night	Tourism Marketing	2005	89 Law	10.20%
<b>Carlsbad Golf</b>	\$450,000	\$2.00 per night	Tourism Marketing	2012	89 Law	10.20%
<b>Carmel</b>	\$630,000	1% room revenue	Tourism Marketing	2012	94 Law	10.20%
<b>Claremont</b>	\$266,000	2% room revenue	Tourism Marketing	2010	94 Law	10.20%
<b>Concord</b>	\$1,200,000	3% room revenue	Tourism Marketing	2013	94 Law	10.20%
<b>Conejo Valley</b>	\$1,200,000	2% room revenue	Tourism Marketing	2013	94 Law	12.20%
<b>Coronado</b>	\$1,450,000	1% room revenue	Tourism Marketing	2010	89 Law	10.20%
<b>Costa Mesa</b>	\$2,700,000	3% room revenue	Tourism Marketing	1995	89 Law	8.20%
<b>Dana Point</b>	\$1,000,000	\$3.00 per night	Tourism Marketing	2009	89 Law	10.20%
<b>Elk Grove</b>	\$350,000	1% - 2% room revenue	Tourism Marketing	2014	94 Law	12.20%
<b>Fairfield</b>	\$800,000	3% room revenue	Tourism Marketing	2013	94 Law	10.20%
<b>Folsom</b>	\$1,000,000	4% room revenue	Tourism Marketing	2002	Local Ordinance (89)	8.20%
<b>Fresno</b>	\$1,800,000	1.5% room revenue	Tourism Marketing	2010	94 Law	12.20%
<b>Garden Grove</b>	\$3,000,000	2.5% room revenue	Tourism Marketing	2010	89 Law	14.70%



District	Annual Budget	Assessment Rates	Programs Funded	Year Approved	Enabling Statute	Other Guest Levies
<b>Gilroy</b>	\$365,000	2% room revenue	Tourism Marketing	2013	94 Law	9.20%
<b>Half Moon Bay</b>	\$200,000	\$1.00 per night	Tourism Marketing	2004	89 Law	12.20%
<b>Healdsburg</b>	\$580,000	2% room revenue	Tourism Marketing	2012	94 Law	12.20%
<b>Humboldt County</b>	\$1,200,000	2% room revenue	Tourism Marketing	2012	94 Law	10.20%
<b>Huntington Beach</b>	\$3,000,000	3% room revenue	Tourism Marketing	2002	94 Law	10.20%
<b>Irvine</b>	\$1,600,000	2% room revenue	Tourism Marketing	2002	Local Ordinance (89)	8.20%
<b>Laguna Beach</b>	\$950,000	2% room revenue	Tourism Marketing	2001	89 Law	12.20%
<b>Lancaster</b>	\$360,000	2% room revenue	Tourism Marketing	2013	94 Law	7.20%
<b>Lodi</b>	\$538,000	4.5% room revenue	Tourism Marketing	2004	94 Law	6.20%
<b>Lompoc</b>	\$360,000	2% room revenue	Tourism Marketing	2014	94 Law	10.20%
<b>Long Beach</b>	\$4,240,000	3% room revenue	Tourism Marketing	2005	89 Law	12.20%
<b>Los Angeles</b>	\$26,600,000	1.5% room revenue	Tourism Marketing	2011	94 Law	14.20%
<b>Madera County</b>	\$450,000	2% room revenue	Tourism Marketing	2010	94 Law	9.30%
<b>Mammoth Lakes</b>	\$4,500,000	1% - 2% revenue Hotels, Restaurants, Ski Resorts	Tourism Marketing	2013	94 Law	13.20%



District	Annual Budget	Assessment Rates	Programs Funded	Year Approved	Enabling Statute	Other Guest Levies
Marin County	\$1,320,000	2% room revenue	Tourism Marketing	2004	89 Law	10.50%
Mariposa County	\$1,300,000	1% room revenue	Tourism Marketing	2008	94 Law	10.20%
Mendocino County	\$1,560,000	1% room revenue	Tourism Marketing	2006	89 Law	10.20%
Monterey County	\$4,175,000	\$0.50 - \$2.50 per night	Tourism Marketing	2006	89 Law	10.50%
Morro Bay	\$645,000	3% room revenue	Tourism Marketing	2009	89 Law	10.50%
Murrieta	\$283,000	3% room revenue	Tourism Marketing	2015	94 Law	10.20%
Napa Valley	\$6,500,000	2% room revenue	Tourism Marketing	2010	94 Law	12.20%
Newport Beach	\$9,000,000	3% room revenue	Tourism Marketing	2009	94 Law	10.20%
Oakdale	\$200,000	2% room revenue	Tourism Marketing	2009	89 Law	7.20%
Oakland	\$1,625,000	\$1.50 per night	Tourism Marketing	2015	94 Law	14.20%
Oceanside	\$950,000	1.5% room revenue	Tourism Marketing	2010	94 Law	10.20%
Ontario	\$3,500,000	2% room revenue (w/ escalation for 3% in 2024)	Tourism Marketing	2013	94 Law	12.00%
Pacific Grove	\$450,000	\$1.00 - 1.50 per night	Tourism Marketing and Physical Improvements	2007	89 Law	10.20%
Pacifica	\$65,000	\$1.00 per night	Tourism Marketing	2004	89 Law	12.20%



District	Annual Budget	Assessment Rates	Programs Funded	Year Approved	Enabling Statute	Other Guest Levies
Palm Springs	\$14,585,000	3% room revenue	Tourism Marketing	2008	94 Law	13.70%
Palm Springs	\$325,000	1% room revenue	Tourism Marketing	2016	89 Law	13.70%
Pasadena	\$3,800,000	2.89% room revenue	Tourism Marketing	2003	94 Law	12.30%
Paso Robles	\$1,280,000	2% room revenue	Tourism Marketing	2008	89 Law	10.20%
Pismo Beach	\$1,750,000	1% room revenue	Tourism Marketing	2009	89 Law	10.20%
Placer Valley	\$3,800,000	\$6.50 per night	Tourism Marketing	2003	94 Law	9.30%
Pleasant Hill	\$632,000	3% room revenue	Tourism Marketing	2017	94 Law	10.20%
Rancho Cordova	\$633,000	\$1.50 per night	Tourism Marketing	2010	94 Law	12.20%
Redding City	\$925,000	2% room revenue	Tourism Marketing	2008	94 Law	10.20%
Redondo Beach	\$785,000	1% room revenue	Tourism Marketing	2018	94 Law	12.20%
Richmond	\$285,000	\$2.00 - \$2.50 per night	Tourism Marketing	2004	94 Law	10.20%
Ridgecrest	\$390,000	3% room revenue	Tourism Marketing	2012	94 Law	10.20%
Sacramento	\$6,000,000	1% - 3% room revenue	Tourism Marketing	2000	94 Law	12.20%
San Diego	\$36,800,000	2% room revenue	Tourism Marketing	2007	Local Ordinance (94)	10.70%



District	Annual Budget	Assessment Rates	Programs Funded	Year Approved	Enabling Statute	Other Guest Levies
<b>San Francisco</b>	\$25,000,000	1.3125% - 2.75% room rev.	Tourism Marketing & Services / Moscone Center Improvements	2008	Local Ordinance (94)	14.20%
<b>San Jose</b>	\$3,300,000	\$1.25 - \$2.75 per night	Tourism Marketing	2006	89 Law	14.20%
<b>San Luis Obispo (City)</b>	\$1,867,000	2% room revenue	Tourism Marketing	2008	89 Law	10.20%
<b>San Luis Obispo (County)</b>	\$3,724,000	2% room revenue	Tourism Marketing	2009	89 Law	9.90%
<b>San Luis Obispo County</b>	\$3,280,000	1% room revenue	Tourism Marketing	2015	94 Law	10.20%
<b>San Mateo</b>	\$1,900,000	\$0.15 - \$1.00 per night	Tourism Marketing	2001	89 Law	12.20%
<b>San Ramon</b>	\$450,000	\$2.00 per night	Tourism Marketing	2015	94 Law	7.50%
<b>Santa Barbara South Coast</b>	\$3,767,000	\$0.50 - \$2.00 per night	Tourism Marketing	2010	94 Law	11.10%
<b>Santa Clara</b>	\$600,000	\$1.00 per night	Tourism Marketing	2004	89 Law	9.70%
<b>Santa Clarita</b>	\$625,000	2% room revenue	Tourism Marketing	2010	89 Law	10.20%
<b>Santa Cruz County</b>	\$1,900,000	\$1.75 - \$3.00 by RevPar	Tourism Marketing	2010	94 Law	10.20%
<b>Santa Maria</b>	\$620,000	2% room revenue	Tourism Marketing	2016	94 Law	12.20%



District	Annual Budget	Assessment Rates	Programs Funded	Year Approved	Enabling Statute	Other Guest Levies
<b>Santa Monica</b>	\$4,130,000	\$1.50 - \$5.25 per night	Tourism Marketing	2013	94 Law	14.20%
<b>Santa Rosa</b>	\$1,425,000	3% room revenue	Tourism Marketing	2010	89 Law	9.20%
<b>Santa Ynez Valley</b>	\$890,000	\$2.00 per night	Tourism Marketing	2010	94 Law	10.20%
<b>Simi Valley</b>	\$360,000	2% room revenue	Tourism Marketing	2014	94 Law	10.20%
<b>Siskiyou County</b>	\$575,000	2% room revenue	Tourism Marketing	2015	94 Law	10.20%
<b>Sonoma City</b>	\$730,000	2% room revenue	Tourism Marketing	2012	94 Law	10.20%
<b>Sonoma County</b>	\$4,700,000	2% room revenue	Tourism Marketing	2004	89 Law	12.20%
<b>South Lake Tahoe</b>	\$2,680,000	\$3.00 - \$4.50 per night	Tourism Marketing	2006	94 Law	12.20%
<b>Squaw Valley   Alpine Meadows</b>	\$715,000	1% room revenue	Transportation	2018	94 Law	10.20%
<b>Stockton</b>	\$1,425,000	4% room revenue	Tourism Marketing	2010	94 Law	8.20%
<b>Temecula</b>	\$1,500,000	4% room revenue	Tourism Marketing	2005	94 Law	8.20%
<b>Temecula Wine</b>	\$189,000	2% room revenue	Tourism Marketing	2016	94 Law	10.20%
<b>Tiburon</b>	\$159,000	1% room revenue	Tourism Marketing	2007	89 Law	10.20%
<b>Torrance</b>	\$500,000	1% room revenue	Tourism Marketing	2010	94 Law	11.20%
<b>Tri-Valley</b>	\$1,900,000	\$2.00 per night	Tourism Marketing	2005	94 Law	8.20%



District	Annual Budget	Assessment Rates	Programs Funded	Year Approved	Enabling Statute	Other Guest Levies
Truckee	\$440,000	2% room revenue	Tourism Marketing	2015	94 Law	10.20%
Twenty-nine Palms	\$150,000	1.5% room revenue	Tourism Marketing	2017	89 Law	9.20%
Vacaville	\$571,000	2% - 3% room revenue	Tourism Marketing	2004	94 Law	8.20%
Vallejo	\$300,000	\$0.50-\$1.00 per night	Tourism Marketing	2003	89 Law	11.20%
Ventura - Oxnard - Camarillo - Port Hueneme	\$2,200,000	2% room revenue	Tourism Marketing	2011	94 Law	10.20%
Visalia	\$600,000	2% room revenue	Tourism Marketing	2017	94 Law	10.20%
Walnut Creek	\$590,000	\$1.50 - \$2.00 per night	Tourism Marketing	2010	89 Law	8.70%
West Hollywood	\$6,000,000	3% room revenue	Tourism Marketing	1989	94 Law	12.70%
Yolo County	\$690,000	2% room revenue	Tourism Marketing	2017	94 Law	11.70%
Yuba-Sutter	\$250,000	2% room revenue	Tourism Marketing	2017	94 Law	10.20%
<b>Convention Center Assessment Districts</b>						
San Francisco	\$19,332,000	.3125% - 1.25% room rev.	Moscone Center	2013	94 Law	14.00%
Placer Valley	\$3,750,000	\$4.25 - \$6.50 per room night	Sports Complex	2015	94 Law	9.10%



District	Annual Budget	Assessment Rates	Programs Funded	Year Approved	Enabling Statute	Other Guest Levies
TID Statistics						
	Annual Budget	of 103 Districts		Years in Existence		TOT
<b>Total</b>	\$269,949,606.00					
<b>Largest</b>	\$36,800,000.00			24		15.20%
<b>Smallest</b>	\$65,000.00			1		6.20%
<b>Average</b>	\$2,620,869.96			3		10.71%

Prepared by: Civitas - (800) 999-7781 - [www.civitasadvisors.com](http://www.civitasadvisors.com) - [jlambeth@civitasadvisors.com](mailto:jlambeth@civitasadvisors.com)



**2019-2024**



# **Feather River Tourism Marketing District Management District Plan**

*Prepared pursuant to the Property and Business Improvement District  
Law of 1994, Streets and Highways Code section 36600 et seq.*

**October 4, 2018**



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Prepared by  
Civitas





## I. OVERVIEW

Developed by the Feather River Tourism Association (FRTA), the Feather River Tourism Marketing District (FRTMD) is an assessment district proposed to provide specific benefits to payors, by funding marketing and sales promotion efforts for assessed businesses.

*Location:* The proposed FRTMD includes all lodging businesses located within the following Zip Codes within the boundaries of the unincorporated portion of Plumas County as shown on the map in Section IV: 96020, 96137, 95923, 95984, 95934, 95947, 95983, 95915, 95971, 95956, and 95981.

*Services:* The FRTMD is designed to provide specific benefits directly to payors by increasing room night sales. Marketing and sales promotions will increase overnight tourism and market payors as tourist, meeting and event destinations, thereby increasing room night sales.

*Budget:* The total FRTMD annual budget for the initial year of its five (5) year operation is anticipated to be approximately \$287,968. This budget is expected to fluctuate as room sales do, but is not expected to significantly change over the FRTMD's term.

*Cost:* The annual assessment rate is three percent (3%) of gross short-term (stays less than 31 days) room rental revenue. Based on the benefit received, assessments will not be collected on: stays of more than thirty (30) consecutive days; stays by any officer or employee of a foreign government, which officer or employee is exempt by reason of express provisions of Federal law or international treaty; and stays pursuant to contracts executed prior to April 1, 2019.

*Collection:* Plumas County will be responsible for collecting the assessment on a quarterly basis (including any delinquencies, penalties and interest) from each lodging business located within the boundaries of the FRTMD. The County shall take all reasonable efforts to collect the assessments from each lodging business.

*Duration:* The proposed FRTMD will have a five (5) year life, beginning April 1, 2019 through March 31, 2024. Once per year beginning on the anniversary of FRTMD formation there is a thirty (30) day period in which owners paying fifty percent (50%) or more of the assessment may protest and initiate a Board of Supervisors hearing on FRTMD termination.

*Management:* The Feather River Tourism Association (FRTA) will serve as the FRTMD's Owners' Association. The FRTA is charged with managing funds and implementing programs in accordance with this Plan, and must provide annual reports to the Board of Supervisors.



## **II. IMPETUS**

There are several reasons why now is the right time to form a TMD in Plumas County; the most compelling reasons are as follows:

### **1. *The Need to Increase Occupancy***

The formation of the FRTMD is a proactive effort to provide supplemental funding beyond that provided by the County. The funding will ensure that adequate financing exists for the investment required to increase occupancy in the lodging industry and be competitive in the conference segment of the tourism market. The investment will cover an expanded marketing and promotional budget needed to reach this market segment.

### **2. *An Opportunity for Increasing County Tax Revenues***

As occupancy rates increase, so too will the County's 'TOT' revenue. With stable public/private funding for tourism marketing efforts, annual occupancy rates should increase significantly as new marketing and sales promotion programs are implemented. Greater occupancy will also produce an increase in sales tax revenues from tourist spending. This represents a substantial return to the County. The formation of the FRTMD in partnership with the FRTA creates a stable funding source tied directly to tourism promotion.

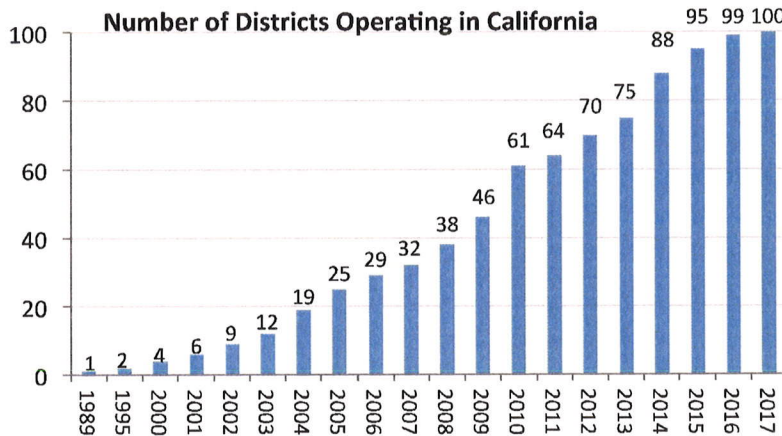
### **3. *Stable Funding for Tourism Promotion***

The FRTMD will provide a stable source of funding for consistent tourism promotion efforts. The FRTMD will provide funding for tourism promotion free of the political and economic circumstances that can reduce or eliminate government funding for tourism promotion.



### III. BACKGROUND

TMDs are an evolution of the traditional Business Improvement District. The first TMD was formed in West Hollywood, California in 1989. Since then, over ninety California destinations have followed suit. In recent years, other states have begun adopting the California model – Montana, South Dakota, Washington, Colorado, Texas and Louisiana have adopted TMD laws. Several other states are in the process of adopting their own legislation. The cities of Wichita, Kansas and Newark, New Jersey used an existing business improvement district law to form a TMD. And, some cities, like Portland, Oregon and Memphis, Tennessee have utilized their home rule powers to create TMDs without a state law.



California's TMDs collectively raise over \$250 million annually for local destination marketing. With competitors raising their budgets, and increasing rivalry for visitor dollars, it is important that Feather River lodging businesses invest in stable, lodging-specific marketing programs.

TMDs utilize the efficiencies of private sector operation in the market-based promotion of tourism districts. TMDs allow lodging business owners to organize their efforts to increase room night sales. Lodging business owners within the TMD pay an assessment and those funds are used to provide services that increase room night sales.

In California, TMDs are formed pursuant to the Property and Business Improvement District Law of 1994. This law allows for the creation of a benefit assessment district to raise funds within a specific geographic area. *The key difference between TMDs and other benefit assessment districts is that funds raised are returned to the private non-profit corporation governing the district.*

There are many benefits to TMDs:

- Funds must be spent on services and improvements that provide a specific benefit only to those who pay;
- Funds cannot be diverted to general government programs;
- They are customized to fit the needs of payors in each destination;
- They allow for a wide range of services;
- They are *designed, created and governed by those who will pay* the assessment; and
- They provide a stable, long-term funding source for tourism promotion.

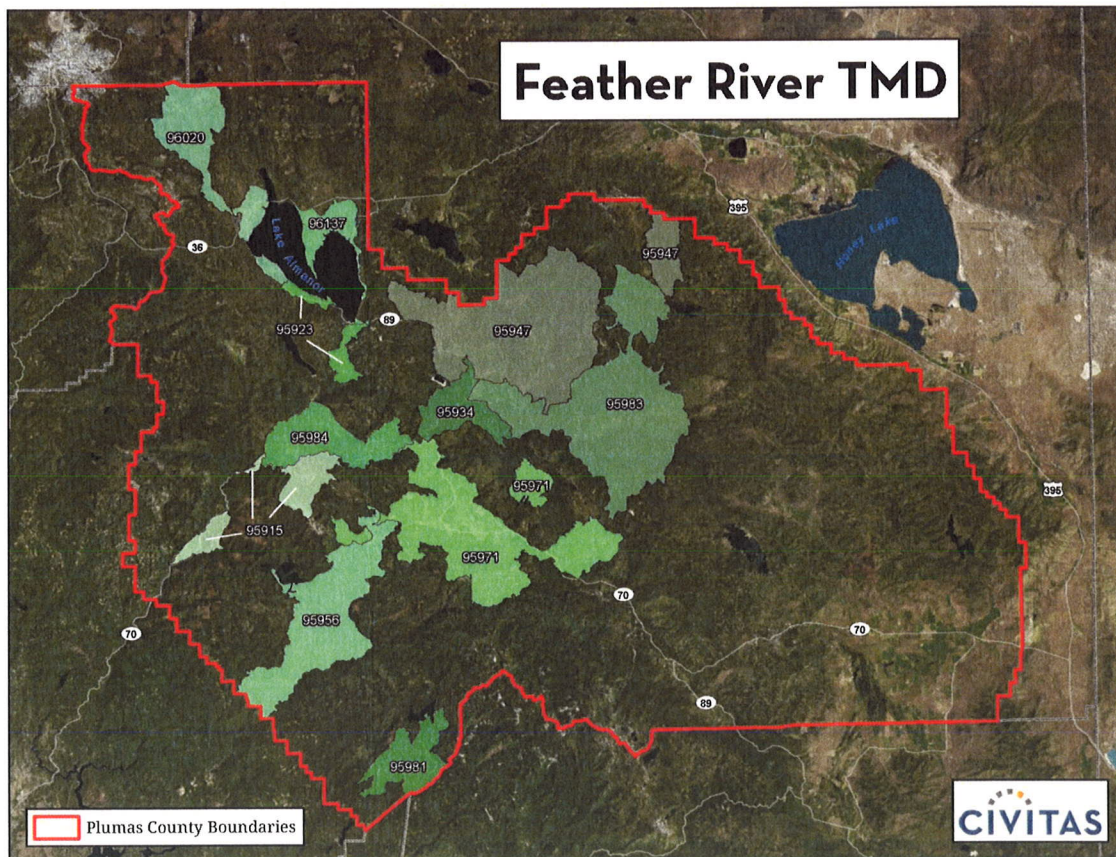


## IV. BOUNDARY

The proposed FRTMD includes all lodging businesses located within the following Zip Codes within the boundaries of the unincorporated portion of Plumas County: 96020, 96137, 95923, 95984, 95934, 95947, 95983, 95915, 95971, 95956, and 95981.

Lodging business means: any building, portion of a building, reserved outdoor space, or other premises rented for use by transients for overnight lodging, and shall refer to the following premises, among others but not exclusively: motel, hotel, inn, tourist home, bed and breakfast, rooming house, apartment house, mobile home park, recreational vehicle park, campground, or parking area.

The boundary, as shown in the map below, currently includes **one hundred sixteen (116)** lodging businesses. A listing of lodging businesses within the proposed FRTMD can be found in Appendix 2.





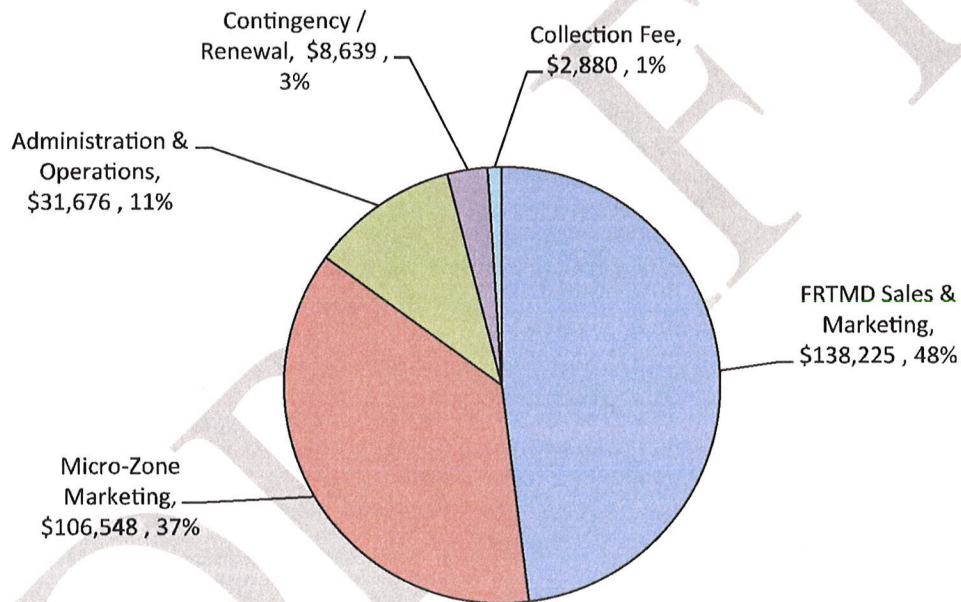
## V. BUDGET AND SERVICES

### A. Annual Service Plan

Assessment funds will be spent to provide specific benefits conferred or privileges granted directly to the payors that are not provided to those not charged, and which do not exceed the reasonable cost to the County of conferring the benefits or granting the privileges. The privileges and services provided with the FRTMD funds are sales and marketing programs available only to assessed businesses.

A service plan budget has been developed to deliver services that benefit businesses throughout the District. A detailed annual budget will be developed and approved by FRTA. The graph below illustrates the initial annual budget allocations. The total initial budget is \$287,968.

### Proposed Initial Annual Budget - \$287,968



Although actual revenues will fluctuate due to market conditions, the proportional allocations of the budget shall remain the same. However, the County and the FRTA Board shall have the authority to adjust budget allocations between the categories by no more than fifteen percent (15%) of the total budget per year. A description of the proposed improvements and activities for the initial year of operation is below. The same activities are proposed for subsequent years. In the event of a legal challenge against the FRTMD, any and all assessment funds may be used for the costs of defending the FRTMD. In the first three (3) years of operation, the costs of creating the FRTMD may be repaid by deducting repayment funds proportionally from each budget category.

Each budget category includes all costs related to providing that service, in accordance with Generally Accepted Accounting Procedures (GAAP). For example, the FRTMD sales and marketing budget includes the cost of staff time dedicated to overseeing and implementing the FRTMD sales and marketing program. Staff time dedicated purely to administrative tasks is allocated to the administrative portion of the budget. The costs of an individual staff member may be allocated to



multiple budget categories, as appropriate in accordance with GAAP. The staffing levels necessary to provide the services below will be determined by the FRTA Board on an as-needed basis.

### **FRTMD Sales and Marketing**

The FRTMD sales and marketing program will promote assessed businesses as tourist, meeting, and event destinations. The FRTMD sales and marketing program will have a central theme of promoting the FRTMD as a desirable place for overnight visits. The program will have the goal of increasing overnight visitation and room night sales at assessed businesses, and may include the following activities:

- Branding the FRTMD;
- Developing a Marketing Plan in the first year of operation;
- Internet marketing efforts to increase awareness and optimize internet presence to drive overnight visitation and room sales to assessed businesses;
- Print ads in magazines and newspapers targeted at potential visitors to drive overnight visitation and room sales to assessed businesses;
- Television ads targeted at potential visitors to drive overnight visitation and room sales to assessed businesses;
- Radio ads targeted at potential visitors to drive overnight visitation and room sales to assessed businesses;
- Attendance of trade shows to promote assessed businesses;
- Sales blitzes for assessed businesses;
- Familiarization tours of assessed businesses;
- Preparation and production of collateral promotional materials such as brochures, flyers and maps featuring assessed businesses;
- Attendance of professional industry conferences and affiliation events to promote assessed businesses;
- Lead generation activities designed to attract tourists and group events to assessed businesses;
- Destination product development programs and infrastructure improvements designed to drive overnight visitation and room sales to assessed businesses;
- Director of Sales and General Manager meetings to plan and coordinate tourism promotion efforts for assessed businesses;
- Education of hospitality staff on service and safety (related to alcohol and food) designed to create a visitor experience that will bring repeat visits to assessed businesses; and
- Education of lodging business management and the FRTA on marketing strategies best suited to meet assessed business's needs.

### **Micro-Zone Marketing**

The Micro-Zone Marketing program will focus on local tourism promotions. Each micro-zone will have funds set aside for local tourism promotions. Each of the three (3) micro-zones will receive a minimum \$10,000 allocation from the Micro-Zone Marketing budget. Any remaining Micro-Zone Marketing funds will be allocated to each micro-zone based on the percentage that micro-zone contributes to the overall FRTMD budget. For example: If one micro-zone's total assessment equals ten percent (10%) of the overall FRTMD budget, that micro-zone would be allocated the minimum amount of \$10,000 plus ten percent (10%) of the remaining Micro-Zone Marketing budget—\$7,654.80 (based on the initial year's estimated total budget) for a total of \$17,654.80. If a



micro-zone needs additional funds it may request additional funds from the FRTA Board, to be taken from the FRTMD Sales and Marketing portion of the FRTMD budget.

Any funds that are not used in a calendar year can be reserved for the next calendar year with an explanation of retention from the micro-zone's FRTA Director to the FRTA Board. If a micro-zone has unused funds from the current year's allocation and cannot submit plans for use of the funds in the subsequent calendar year, those funds will be returned to the Micro-Zone Marketing Fund for distribution among all micro-zones, by percentage, in the next calendar year.

The Micro-Zone Marketing program will have a central theme of promoting each micro-zone as a desirable place for overnight visits. FRTA Directors from each micro-zone will make decisions regarding use of funds dedicated to that micro-zone. The programs will have the goal of increasing overnight visitation and room night sales at assessed businesses, and may include the same or similar activities as FRTMD Sales and Marketing programs, listed above.

The micro-zones in the FRTMD are:

1. Quincy, Meadow Valley and Bucks Lake; and
2. Lake Almoner and Chester; and
3. Indian Valley and Feather River Canyon.

#### **Administration and Operations**

The administration and operations portion of the budget shall be utilized for administrative staffing costs, office costs, advocacy and other general administrative costs such as insurance, legal, and accounting fees.

#### **Collection Fee**

Plumas County shall retain a fee equal to one percent (1%) of the amount of assessment collected to cover its costs of collection and administration. The fee retained by the County to cover its cost of collection and administration shall not exceed \$10,000 per year.

#### **Contingency/Renewal**

A prudent portion of the budget will be allocated to a contingency fund, to account for lower than anticipated collections. If there are contingency funds collected and near the expiration of the FRTMD there are contingency funds remaining, and business owners wish to renew the FRTMD, the contingency funds may be used for renewal costs.

#### **B. Annual Budget**

The total five (5) year improvement and service plan budget is projected at approximately \$287,968 annually, or \$1,439,840 through 2024. This amount may fluctuate as sales and revenue increase at assessed businesses, but is not expected to change significantly over the term.

#### **C. California Constitutional Compliance**

The FRTMD assessment is not a property-based assessment subject to the requirements of Proposition 218. Courts have found Proposition 218 limited the term 'assessments' to levies on real property.<sup>1</sup> Rather, the FRTMD assessment is a business-based assessment, and is subject to Proposition 26. Pursuant to Proposition 26 all levies are a tax unless they fit one of seven exceptions. Two of these exceptions apply to the FRTMD, a "specific benefit" and a "specific

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<sup>1</sup> *Jarvis v. the City of San Diego* 72 Cal App. 4<sup>th</sup> 230



government service.” Both require that the costs of benefits or services do not exceed the reasonable costs to the City of conferring the benefits or providing the services.

### ***1. Specific Benefit***

Proposition 26 requires that assessment funds be expended on, “a specific benefit conferred or privilege granted directly to the payor that is not provided to those not charged, and which does not exceed the reasonable costs to the local government of conferring the benefit or granting the privilege.”<sup>2</sup> The services in this Management Plan are designed to provide targeted benefits directly to assessed businesses, and are intended only to provide benefits and services directly to those businesses paying the assessment. These services are tailored not to serve the general public, businesses in general, or parcels of land, but rather to serve the specific businesses within the FRTMD. The activities described in this Plan are specifically targeted to increase room night sales for assessed lodging businesses within the boundaries of the FRTMD, and are narrowly tailored. FRTMD funds will be used exclusively to provide the specific benefit of increased room night sales directly to the assesseees. Assessment funds shall not be used to feature non-assessed lodging businesses in FRTMD programs, or to directly generate sales for non-assessed businesses. The activities paid for from assessment revenues are business services constituting and providing specific benefits to the assessed businesses.

The assessment imposed by this FRTMD is for a specific benefit conferred directly to the payors that is not provided to those not charged. The specific benefit conferred directly to the payors is an increase in room night sales. The specific benefit of an increase in room night sales for assessed lodging businesses will be provided only to lodging businesses paying the FRTMD assessment, with marketing and sales programs promoting lodging businesses paying the FRTMD assessment. The marketing and sales programs will be designed to increase room night sales at each assessed lodging businesses. Because they are necessary to provide the marketing and sales programs that specifically benefit the assessed lodging businesses, the administration, collection and contingency services also provide the specific benefit of increased room night sales to the assessed lodging businesses.

Although the FRTMD, in providing specific benefits to payors, may produce incidental benefits to non-paying businesses, the incidental benefit does not preclude the services from being considered a specific benefit. The legislature has found that, “A specific benefit is not excluded from classification as a ‘specific benefit’ merely because an indirect benefit to a nonpayor occurs incidentally and without cost to the payor as a consequence of providing the specific benefit to the payor.”<sup>3</sup>

### ***2. Specific Government Service***

The assessment may also be utilized to provide, “a specific government service or product provided directly to the payor that is not provided to those not charged, and which does not exceed the reasonable costs to the local government of providing the service or product.”<sup>4</sup> The legislature has recognized that marketing and promotions services like those to be provided by the FRTMD are government services within the meaning of Proposition 26<sup>5</sup>. Further, the legislature has determined that “a specific government service is not excluded from classification as a ‘specific government service’ merely because an indirect benefit to a nonpayor occurs incidentally and without cost to the payor as a consequence of providing the specific government service to the payor.”<sup>6</sup>

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<sup>2</sup> Cal. Const. art XIII C § 1(e)(1)

<sup>3</sup> Government Code § 53758(a)

<sup>4</sup> Cal. Const. art XIII C § 1(e)(2)

<sup>5</sup> Government Code § 53758(b)

<sup>6</sup> Government Code § 53758(b)



### **3. Reasonable Cost**

FRTMD services will be implemented carefully to ensure they do not exceed the reasonable cost of such services. The full amount assessed will be used to provide the services described herein. Funds will be managed by the FRTA, and reports submitted on an annual basis to the County. Only assessed lodging businesses will be featured in marketing materials, receive sales leads generated from FRTMD-funded activities, be featured in advertising campaigns, and benefit from other FRTMD-funded services. Non-assessed lodging businesses will not receive these, nor any other, FRTMD-funded services and benefits.

The FRTMD-funded programs are all targeted directly at and feature only assessed businesses. It is, however, possible that there will be a spill over benefit to non-assessed businesses. If non-assessed lodging businesses receive incremental room nights, that portion of the promotion or program generating those room nights shall be paid with non-FRTMD funds. FRTMD funds shall only be spent to benefit the assessed businesses, and shall not be spent on that portion of any program which directly generates incidental room nights for non-assessed businesses.

### **D. Assessment**

The annual assessment rate is three percent (3%) of gross short term (stays less than 31 days) room rental revenue. Any person or group actually occupying a lodging shall be deemed a transient until the period of thirty (30) days has expired, unless there is an agreement in writing between the operator and the occupant that provides for a period of occupancy longer than thirty (30) days. Based on the benefit received, assessments will not be collected on: stays of more than thirty (30) consecutive days; stays by any officer or employee of a foreign government, which officer or employee is exempt by reason of express provisions of Federal law or international treaty; and stays pursuant to contracts executed prior to April 1, 2019.

The term "gross room rental revenue" as used herein means: the fee, charge, or other valuable consideration received by a lodging business operator as gross proceeds paid by a transient for lodging; also, "gross room rental revenue" shall refer to such receipts in the form of money or in-kind goods and services prior to any deduction for any reason whatsoever. Gross room rental revenue shall not include any federal, state or local taxes collected, including but not limited to transient occupancy taxes.

The amount of assessment, if passed on to each transient, shall be disclosed in advance and separately stated from the amount of rent charged and any other applicable taxes, and each transient shall receive a receipt for payment from the business. The assessment shall be disclosed as the "FRTMD Assessment." The assessment shall not be considered revenue for any purposes, including calculation of transient occupancy taxes.

Bonds shall not be issued.

### **E. Penalties and Interest**

1. *Original Delinquencies:* Any lodging business which shall fail to remit any assessment imposed within the time required shall pay a penalty in the amount of ten percent (10%) of the amount of the assessment in addition to the amount of the assessment.



2. *Continued Delinquencies:* Any lodging business which shall fail to remit any delinquent remittance on or before a period of thirty (30) days following the date on which the remittance first became delinquent shall pay a second delinquency penalty in the amount of ten percent (10%) of the amount of the assessment in addition to the amount of the assessment and the ten percent (10%) penalty first imposed.
3. *Fraud:* If the County determines that the nonpayment of any remittance due is due to fraud, a penalty in the amount of twenty-five percent (25%) of the amount of the assessment shall be added thereto, in addition to the penalties set forth in subsections 1 and 2 of this section.
4. *Interest:* In addition to the penalties imposed, any lodging business which shall fail to remit any assessment imposed shall pay interest at the rate of one percent (1%) per month, on the amount of the assessment, exclusive of penalties, attaching on the first day of the month in which the assessment became delinquent and on the first day of each month thereafter to the time of payment. If the last day of a month falls on a Saturday, Sunday, or legal holiday, the additional one percent (1%) shall attach after 5:00 PM on the next business day.
5. *Penalties and Interest Merged with Assessment:* Every penalty imposed, and such interest as accrues, shall become part of the assessment required to be paid.

#### **F. Time and Manner for Collecting Assessments**

The FRTMD assessment will be implemented beginning April 1, 2019 and will continue for five (5) years through March 31, 2024. The County will be responsible for collecting the assessment on a quarterly basis (including any delinquencies, penalties and interest) from each lodging business within the boundaries of the FRTMD. The County shall take all reasonable efforts to collect the assessments from each lodging business. The County shall forward the assessments collected to the FRTA.



## **VI. GOVERNANCE**

### **A. Owners' Association**

The Board of Supervisors, through adoption of this Management District Plan, has the right, pursuant to Streets and Highways Code §36651, to identify the body that shall implement the proposed program, which shall be the Owners' Association of the FRTMD as defined in Streets and Highways Code §36614.5. The Board of Supervisors has determined that the Feather River Tourism Association will serve as the Owners' Association for the FRTMD.

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### **B. Owners' Association Board of Directors Makeup**

The Board of Directors of the FRTA will be comprised of representatives of assessed lodging businesses within the FRTMD. Representation on the FRTA Board will be proportional to the percentage of each region's annual assessment.

### **C. Brown Act and California Public Records Act Compliance**

An Owners' Association is a private entity and may not be considered a public entity for any purpose, nor may its board members or staff be considered to be public officials for any purpose. The Owners' Association is, however, subject to government regulations relating to transparency, namely the Ralph M. Brown Act and the California Public Records Act. These regulations are designed to promote public accountability. The Owners' Association acts as a legislative body under the Ralph M. Brown Act (Government Code §54950 et seq.). Thus, meetings of the FRTA Board and certain committees must be held in compliance with the public notice and other requirements of the Brown Act. The FRTA is also subject to the record keeping and disclosure requirements of the California Public Records Act. Accordingly, the FRTA shall publicly report any action taken and the vote or abstention on that action of each member present for the action.

### **D. Annual Report**

The FRTA shall present an annual report at the end of each year of operation to the Board of Supervisors pursuant to Streets and Highways Code §36650 (see Appendix 1). The annual report shall include:

- Any proposed changes in the boundaries of the improvement district or in any benefit zones or classification of businesses within the district.
- The improvements and activities to be provided for that fiscal year.
- An estimate of the cost of providing the improvements and the activities for that fiscal year.
- The method and basis of levying the assessment in sufficient detail to allow each business owner to estimate the amount of the assessment to be levied against his or her business for that fiscal year.
- The estimated amount of any surplus or deficit revenues to be carried over from a previous fiscal year.
- The estimated amount of any contributions to be made from sources other than assessments levied pursuant to this part.



# **APPENDIX 1 – LAW**

\*\*\* THIS DOCUMENT IS CURRENT THROUGH THE 2018 SUPPLEMENT \*\*\*  
(ALL 2017 LEGISLATION)

## **STREETS AND HIGHWAYS CODE DIVISION 18. PARKING PART 7. PROPERTY AND BUSINESS IMPROVEMENT DISTRICT LAW OF 1994**

### **CHAPTER 1. General Provisions**

#### **ARTICLE 1. Declarations**

##### **36600. Citation of part**

This part shall be known and may be cited as the “Property and Business Improvement District Law of 1994.”

##### **36601. Legislative findings and declarations; Legislative guidance**

The Legislature finds and declares all of the following:

(a) Businesses located and operating within business districts in some of this state’s communities are economically disadvantaged, are underutilized, and are unable to attract customers due to inadequate facilities, services, and activities in the business districts.

(b) It is in the public interest to promote the economic revitalization and physical maintenance of business districts in order to create jobs, attract new businesses, and prevent the erosion of the business districts.

(c) It is of particular local benefit to allow business districts to fund business related improvements, maintenance, and activities through the levy of assessments upon the businesses or real property that receive benefits from those improvements.

(d) Assessments levied for the purpose of conferring special benefit upon the real property or a specific benefit upon the businesses in a business district are not taxes for the general benefit of a city, even if property, businesses, or persons not assessed receive incidental or collateral effects that benefit them.

(e) Property and business improvement districts formed throughout this state have conferred special benefits upon properties and businesses within their districts and have made those properties and businesses more useful by providing the following benefits:

(1) Crime reduction. A study by the Rand Corporation has confirmed a 12-percent reduction in the incidence of robbery and an 8-percent reduction in the total incidence of violent crimes within the 30 districts studied.

(2) Job creation.

(3) Business attraction.

(4) Business retention.

(5) Economic growth.

(6) New investments.

(f) With the dissolution of redevelopment agencies throughout the state, property and business improvement districts have become even more important tools with which communities can combat blight, promote economic opportunities, and create a clean and safe environment.

(g) Since the enactment of this act, the people of California have adopted Proposition 218, which added Article XIII D to the Constitution in order to place certain requirements and restrictions on the formation of, and activities, expenditures, and assessments by property-based districts. Article XIII D of the Constitution provides that property-based districts may only levy assessments for special benefits.

(h) The act amending this section is intended to provide the Legislature’s guidance with regard to this act, its interaction with the provisions of Article XIII D of the Constitution, and the determination of special benefits in property-based districts.

(1) The lack of legislative guidance has resulted in uncertainty and inconsistent application of this act, which discourages the use of assessments to fund needed improvements, maintenance, and activities in property-based districts, contributing to blight and other underutilization of property.

(2) Activities undertaken for the purpose of conferring special benefits upon property to be assessed inherently produce incidental or collateral effects that benefit property or persons not



assessed. Therefore, for special benefits to exist as a separate and distinct category from general benefits, the incidental or collateral effects of those special benefits are inherently part of those special benefits. The mere fact that special benefits produce incidental or collateral effects that benefit property or persons not assessed does not convert any portion of those special benefits or their incidental or collateral effects into general benefits.

(3) It is of the utmost importance that property-based districts created under this act have clarity regarding restrictions on assessments they may levy and the proper determination of special benefits. Legislative clarity with regard to this act will provide districts with clear instructions and courts with legislative intent regarding restrictions on property-based assessments, and the manner in which special benefits should be determined.

### **36602. Purpose of part**

The purpose of this part is to supplement previously enacted provisions of law that authorize cities to levy assessments within property and business improvement districts, to ensure that those assessments conform to all constitutional requirements and are determined and assessed in accordance with the guidance set forth in this act. This part does not affect or limit any other provisions of law authorizing or providing for the furnishing of improvements or activities or the raising of revenue for these purposes.

### **36603. Preemption of authority or charter city to adopt ordinances levying assessments**

Nothing in this part is intended to preempt the authority of a charter city to adopt ordinances providing for a different method of levying assessments for similar or additional purposes from those set forth in this part. A property and business improvement district created pursuant to this part is expressly exempt from the provisions of the Special Assessment Investigation, Limitation and Majority Protest Act of 1931 (Division 4 (commencing with Section 2800)).

### **36603.5. Part prevails over conflicting provisions**

Any provision of this part that conflicts with any other provision of law shall prevail over the other provision of law, as to districts created under this part.

### **36604. Severability**

This part is intended to be construed liberally and, if any provision is held invalid, the remaining provisions shall remain in full force and effect. Assessments levied under this part are not special taxes.

## **ARTICLE 2. Definitions**

### **36606. “Activities”**

“Activities” means, but is not limited to, all of the following that benefit businesses or real property in the district:

- (a) Promotion of public events.
- (b) Furnishing of music in any public place.
- (c) Promotion of tourism within the district.
- (d) Marketing and economic development, including retail retention and recruitment.
- (e) Providing security, sanitation, graffiti removal, street and sidewalk cleaning, and other municipal services supplemental to those normally provided by the municipality.
- (f) Other services provided for the purpose of conferring special benefit upon assessed real property or specific benefits upon assessed businesses located in the district.

### **36606.5. “Assessment”**

“Assessment” means a levy for the purpose of acquiring, constructing, installing, or maintaining improvements and providing activities that will provide certain benefits to properties or businesses located within a property and business improvement district.



**36607. “Business”**

“Business” means all types of businesses and includes financial institutions and professions.

**36608. “City”**

“City” means a city, county, city and county, or an agency or entity created pursuant to Article 1 (commencing with Section 6500) of Chapter 5 of Division 7 of Title 1 of the Government Code, the public member agencies of which includes only cities, counties, or a city and county, or the State of California.

**36609. “City council”**

“City council” means the city council of a city or the board of supervisors of a county, or the agency, commission, or board created pursuant to a joint powers agreement and which is a city within the meaning of this part.

**36609.4. “Clerk”**

“Clerk” means the clerk of the legislative body.

**36609.5. “General benefit”**

“General benefit” means, for purposes of a property-based district, any benefit that is not a “special benefit” as defined in Section 36615.5.

**36610. “Improvement”**

“Improvement” means the acquisition, construction, installation, or maintenance of any tangible property with an estimated useful life of five years or more including, but not limited to, the following:

- (a) Parking facilities.
- (b) Benches, booths, kiosks, display cases, pedestrian shelters and signs.
- (c) Trash receptacles and public restrooms.
- (d) Lighting and heating facilities.
- (e) Decorations.
- (f) Parks.
- (g) Fountains.
- (h) Planting areas.
- (i) Closing, opening, widening, or narrowing of existing streets.
- (j) Facilities or equipment, or both, to enhance security of persons and property within the district.
- (k) Ramps, sidewalks, plazas, and pedestrian malls.
- (l) Rehabilitation or removal of existing structures.

**36611. “Management district plan”; “Plan”**

“Management district plan” or “plan” means a proposal as defined in Section 36622.

**36612. “Owners’ association”**

“Owners’ association” means a private nonprofit entity that is under contract with a city to administer or implement improvements, maintenance, and activities specified in the management district plan. An owners’ association may be an existing nonprofit entity or a newly formed nonprofit entity. An owners’ association is a private entity and may not be considered a public entity for any purpose, nor may its board members or staff be considered to be public officials for any purpose. Notwithstanding this section, an owners’ association shall comply with the Ralph M. Brown Act (Chapter 9 (commencing with Section 54950) of Part 1 of Division 2 of Title 5 of the Government Code), at all times when matters within the subject matter of the district are heard, discussed, or deliberated, and with the California Public Records Act (Chapter 3.5 (commencing with Section 6250) of Division 7 of Title 1 of the Government Code), for all records relating to activities of the district.

**36614. “Property”**



“Property” means real property situated within a district.

**36614.5. “Property and business improvement district”; “District”**

“Property and business improvement district,” or “district,” means a property and business improvement district established pursuant to this part.

**36614.6. “Property-based assessment”**

“Property-based assessment” means any assessment made pursuant to this part upon real property.

**36614.7. “Property-based district”**

“Property-based district” means any district in which a city levies a property-based assessment.

**36615. “Property owner”; “Business owner”; “Owner”**

“Property owner” means any person shown as the owner of land on the last equalized assessment roll or otherwise known to be the owner of land by the city council. “Business owner” means any person recognized by the city as the owner of the business. “Owner” means either a business owner or a property owner. The city council has no obligation to obtain other information as to the ownership of land or businesses, and its determination of ownership shall be final and conclusive for the purposes of this part. Wherever this part requires the signature of the property owner, the signature of the authorized agent of the property owner shall be sufficient. Wherever this part requires the signature of the business owner, the signature of the authorized agent of the business owner shall be sufficient.

**36615.5. “Special benefit”**

“Special benefit” means, for purposes of a property-based district, a particular and distinct benefit over and above general benefits conferred on real property located in a district or to the public at large. Special benefit includes incidental or collateral effects that arise from the improvements, maintenance, or activities of property-based districts even if those incidental or collateral effects benefit property or persons not assessed. Special benefit excludes general enhancement of property value.

**36616. “Tenant”**

“Tenant” means an occupant pursuant to a lease of commercial space or a dwelling unit, other than an owner.

**ARTICLE 3. Prior Law**

**36617. Alternate method of financing certain improvements and activities; Effect on other provisions**

This part provides an alternative method of financing certain improvements and activities. The provisions of this part shall not affect or limit any other provisions of law authorizing or providing for the furnishing of improvements or activities or the raising of revenue for these purposes. Every improvement area established pursuant to the Parking and Business Improvement Area Law of 1989 (Part 6 (commencing with Section 36500) of this division) is valid and effective and is unaffected by this part.

**CHAPTER 2. Establishment**

**36620. Establishment of property and business improvement district**

A property and business improvement district may be established as provided in this chapter.

**36620.5. Requirement of consent of city council**

A county may not form a district within the territorial jurisdiction of a city without the consent of the city council of that city. A city may not form a district within the unincorporated territory of a county without the consent of the



board of supervisors of that county. A city may not form a district within the territorial jurisdiction of another city without the consent of the city council of the other city.

**36621. Initiation of proceedings; Petition of property or business owners in proposed district**

- (a) Upon the submission of a written petition, signed by the property or business owners in the proposed district who will pay more than 50 percent of the assessments proposed to be levied, the city council may initiate proceedings to form a district by the adoption of a resolution expressing its intention to form a district. The amount of assessment attributable to property or a business owned by the same property or business owner that is in excess of 40 percent of the amount of all assessments proposed to be levied, shall not be included in determining whether the petition is signed by property or business owners who will pay more than 50 percent of the total amount of assessments proposed to be levied.
- (b) The petition of property or business owners required under subdivision (a) shall include a summary of the management district plan. That summary shall include all of the following:
  - (1) A map showing the boundaries of the district.
  - (2) Information specifying where the complete management district plan can be obtained.
  - (3) Information specifying that the complete management district plan shall be furnished upon request.
- (c) The resolution of intention described in subdivision (a) shall contain all of the following:
  - (1) A brief description of the proposed improvements, maintenance, and activities, the amount of the proposed assessment, a statement as to whether the assessment will be levied on property or businesses within the district, a statement as to whether bonds will be issued, and a description of the exterior boundaries of the proposed district, which may be made by reference to any plan or map that is on file with the clerk. The descriptions and statements do not need to be detailed and shall be sufficient if they enable an owner to generally identify the nature and extent of the improvements, maintenance, and activities, and the location and extent of the proposed district.
  - (2) A time and place for a public hearing on the establishment of the property and business improvement district and the levy of assessments, which shall be consistent with the requirements of Section 36623.

**36622. Contents of management district plan**

The management district plan shall include, but is not limited to, all of the following:

- (a) If the assessment will be levied on property, a map of the district in sufficient detail to locate each parcel of property and, if businesses are to be assessed, each business within the district. If the assessment will be levied on businesses, a map that identifies the district boundaries in sufficient detail to allow a business owner to reasonably determine whether a business is located within the district boundaries. If the assessment will be levied on property and businesses, a map of the district in sufficient detail to locate each parcel of property and to allow a business owner to reasonably determine whether a business is located within the district boundaries.
- (b) The name of the proposed district.
- (c) A description of the boundaries of the district, including the boundaries of benefit zones, proposed for establishment or extension in a manner sufficient to identify the affected property and businesses included, which may be made by reference to any plan or map that is on file with the clerk. The boundaries of a proposed property assessment district shall not overlap with the boundaries of another existing property assessment district created pursuant to this part. This part does not prohibit the boundaries of a district created pursuant to this part to overlap with other assessment districts established pursuant to other provisions of law, including, but not limited to, the Parking and Business Improvement Area Law of 1989 (Part 6 (commencing with Section 36500)). This part does not prohibit the boundaries of a business assessment district created pursuant to this part to overlap with another business assessment district created pursuant to this part. This part does not prohibit the boundaries of a business assessment district created pursuant to this part to overlap with a property assessment district created pursuant to this part.
- (d) The improvements, maintenance, and activities proposed for each year of operation of the district and the maximum cost thereof. If the improvements, maintenance, and activities proposed for each year of operation are the same, a description of the first year's proposed improvements, maintenance, and activities and a statement that the same improvements, maintenance, and activities are proposed for subsequent years shall satisfy the requirements of this subdivision.



- (e) The total annual amount proposed to be expended for improvements, maintenance, or activities, and debt service in each year of operation of the district. If the assessment is levied on businesses, this amount may be estimated based upon the assessment rate. If the total annual amount proposed to be expended in each year of operation of the district is not significantly different, the amount proposed to be expended in the initial year and a statement that a similar amount applies to subsequent years shall satisfy the requirements of this subdivision.
- (f) The proposed source or sources of financing, including the proposed method and basis of levying the assessment in sufficient detail to allow each property or business owner to calculate the amount of the assessment to be levied against his or her property or business. The plan also shall state whether bonds will be issued to finance improvements.
- (g) The time and manner of collecting the assessments.
- (h) The specific number of years in which assessments will be levied. In a new district, the maximum number of years shall be five. Upon renewal, a district shall have a term not to exceed 10 years. Notwithstanding these limitations, a district created pursuant to this part to finance capital improvements with bonds may levy assessments until the maximum maturity of the bonds. The management district plan may set forth specific increases in assessments for each year of operation of the district.
- (i) The proposed time for implementation and completion of the management district plan.
- (j) Any proposed rules and regulations to be applicable to the district.
- (k)
  - (1) A list of the properties or businesses to be assessed, including the assessor's parcel numbers for properties to be assessed, and a statement of the method or methods by which the expenses of a district will be imposed upon benefited real property or businesses, in proportion to the benefit received by the property or business, to defray the cost thereof.
  - (2) In a property-based district, the proportionate special benefit derived by each identified parcel shall be determined exclusively in relationship to the entirety of the capital cost of a public improvement, the maintenance and operation expenses of a public improvement, or the cost of the activities. An assessment shall not be imposed on any parcel that exceeds the reasonable cost of the proportional special benefit conferred on that parcel. Only special benefits are assessable, and a property-based district shall separate the general benefits, if any, from the special benefits conferred on a parcel. Parcels within a property-based district that are owned or used by any city, public agency, the State of California, or the United States shall not be exempt from assessment unless the governmental entity can demonstrate by clear and convincing evidence that those publicly owned parcels in fact receive no special benefit. The value of any incidental, secondary, or collateral effects that arise from the improvements, maintenance, or activities of a property-based district and that benefit property or persons not assessed shall not be deducted from the entirety of the cost of any special benefit or affect the proportionate special benefit derived by each identified parcel.
- (l) In a property-based district, the total amount of all special benefits to be conferred upon the properties located within the property-based district.
- (m) In a property-based district, the total amount of general benefits, if any.
- (n) In a property-based district, a detailed engineer's report prepared by a registered professional engineer certified by the State of California supporting all assessments contemplated by the management district plan.
- (o) Any other item or matter required to be incorporated therein by the city council.

### **36623. Procedure to levy assessment**

- (a) If a city council proposes to levy a new or increased property assessment, the notice and protest and hearing procedure shall comply with Section 53753 of the Government Code.
- (b) If a city council proposes to levy a new or increased business assessment, the notice and protest and hearing procedure shall comply with Section 54954.6 of the Government Code, except that notice shall be mailed to the owners of the businesses proposed to be assessed. A protest may be made orally or in writing by any interested person. Every written protest shall be filed with the clerk at or before the time fixed for the public hearing. The city council may waive any irregularity in the form or content of any written protest. A written protest may be withdrawn in writing at any time before the conclusion of the public hearing. Each written protest shall contain a description of the business in which the person subscribing the protest is interested sufficient to identify the business and, if a person subscribing is not shown on the official records of the city as the owner of the business, the protest shall contain or be accompanied by written evidence that the person subscribing is the owner of the business or the authorized representative. A



written protest that does not comply with this section shall not be counted in determining a majority protest. If written protests are received from the owners or authorized representatives of businesses in the proposed district that will pay 50 percent or more of the assessments proposed to be levied and protests are not withdrawn so as to reduce the protests to less than 50 percent, no further proceedings to levy the proposed assessment against such businesses, as contained in the resolution of intention, shall be taken for a period of one year from the date of the finding of a majority protest by the city council.

(c) If a city council proposes to conduct a single proceeding to levy both a new or increased property assessment and a new or increased business assessment, the notice and protest and hearing procedure for the property assessment shall comply with subdivision (a), and the notice and protest and hearing procedure for the business assessment shall comply with subdivision (b). If a majority protest is received from either the property or business owners, that respective portion of the assessment shall not be levied. The remaining portion of the assessment may be levied unless the improvement or other special benefit was proposed to be funded by assessing both property and business owners.

#### **36624. Changes to proposed assessments**

At the conclusion of the public hearing to establish the district, the city council may adopt, revise, change, reduce, or modify the proposed assessment or the type or types of improvements, maintenance, and activities to be funded with the revenues from the assessments. Proposed assessments may only be revised by reducing any or all of them. At the public hearing, the city council may only make changes in, to, or from the boundaries of the proposed property and business improvement district that will exclude territory that will not benefit from the proposed improvements, maintenance, and activities. Any modifications, revisions, reductions, or changes to the proposed assessment district shall be reflected in the notice and map recorded pursuant to Section 36627.

#### **36625. Resolution of formation**

(a) If the city council, following the public hearing, decides to establish a proposed property and business improvement district, the city council shall adopt a resolution of formation that shall include, but is not limited to, all of the following:

- (1) A brief description of the proposed improvements, maintenance, and activities, the amount of the proposed assessment, a statement as to whether the assessment will be levied on property, businesses, or both within the district, a statement on whether bonds will be issued, and a description of the exterior boundaries of the proposed district, which may be made by reference to any plan or map that is on file with the clerk. The descriptions and statements need not be detailed and shall be sufficient if they enable an owner to generally identify the nature and extent of the improvements, maintenance, and activities and the location and extent of the proposed district.
- (2) The number, date of adoption, and title of the resolution of intention.
- (3) The time and place where the public hearing was held concerning the establishment of the district.
- (4) A determination regarding any protests received. The city shall not establish the district or levy assessments if a majority protest was received.
- (5) A statement that the properties, businesses, or properties and businesses in the district established by the resolution shall be subject to any amendments to this part.
- (6) A statement that the improvements, maintenance, and activities to be conferred on businesses and properties in the district will be funded by the levy of the assessments. The revenue from the levy of assessments within a district shall not be used to provide improvements, maintenance, or activities outside the district or for any purpose other than the purposes specified in the resolution of intention, as modified by the city council at the hearing concerning establishment of the district. Notwithstanding the foregoing, improvements and activities that must be provided outside the district boundaries to create a special or specific benefit to the assessed parcels or businesses may be provided, but shall be limited to marketing or signage pointing to the district.
- (7) A finding that the property or businesses within the area of the property and business improvement district will be benefited by the improvements, maintenance, and activities funded by the proposed assessments, and, for a property-based district, that property within the district will receive a special benefit.
- (8) In a property-based district, the total amount of all special benefits to be conferred on the properties within the property-based district.



(b) The adoption of the resolution of formation and, if required, recordation of the notice and map pursuant to Section 36627 shall constitute the levy of an assessment in each of the fiscal years referred to in the management district plan.

**36626. Resolution establishing district**

If the city council, following the public hearing, desires to establish the proposed property and business improvement district, and the city council has not made changes pursuant to Section 36624, or has made changes that do not substantially change the proposed assessment, the city council shall adopt a resolution establishing the district. The resolution shall contain all of the information specified in Section 36625.

**36627. Notice and assessment diagram**

Following adoption of the resolution establishing district assessments on properties pursuant to Section 36625 or Section 36626, the clerk shall record a notice and an assessment diagram pursuant to Section 3114. No other provision of Division 4.5 (commencing with Section 3100) applies to an assessment district created pursuant to this part.

**36628. Establishment of separate benefit zones within district; Categories of businesses**

The city council may establish one or more separate benefit zones within the district based upon the degree of benefit derived from the improvements or activities to be provided within the benefit zone and may impose a different assessment within each benefit zone. If the assessment is to be levied on businesses, the city council may also define categories of businesses based upon the degree of benefit that each will derive from the improvements or activities to be provided within the district and may impose a different assessment or rate of assessment on each category of business, or on each category of business within each zone.

**36628.5. Assessments on businesses or property owners**

The city council may levy assessments on businesses or on property owners, or a combination of the two, pursuant to this part. The city council shall structure the assessments in whatever manner it determines corresponds with the distribution of benefits from the proposed improvements, maintenance, and activities, provided that any property-based assessment conforms with the requirements set forth in paragraph (2) of subdivision (k) of Section 36622.

**36629. Provisions and procedures applicable to benefit zones and business categories**

All provisions of this part applicable to the establishment, modification, or disestablishment of a property and business improvement district apply to the establishment, modification, or disestablishment of benefit zones or categories of business. The city council shall, to establish, modify, or disestablish a benefit zone or category of business, follow the procedure to establish, modify, or disestablish a property and business improvement district.

**36630. Expiration of district; Creation of new district**

If a property and business improvement district expires due to the time limit set pursuant to subdivision (h) of Section 36622, a new management district plan may be created and the district may be renewed pursuant to this part.

**CHAPTER 3. Assessments**

**36631. Time and manner of collection of assessments; Delinquent payments**

The collection of the assessments levied pursuant to this part shall be made at the time and in the manner set forth by the city council in the resolution levying the assessment. Assessments levied on real property may be collected at the same time and in the same manner as for the ad valorem property tax, and may provide for the same lien priority and penalties for delinquent payment. All delinquent payments for assessments levied pursuant to this part may be charged interest and penalties.

**36632. Assessments to be based on estimated benefit; Classification of real property and businesses; Exclusion of residential and agricultural property**



(a) The assessments levied on real property pursuant to this part shall be levied on the basis of the estimated benefit to the real property within the property and business improvement district. The city council may classify properties for purposes of determining the benefit to property of the improvements and activities provided pursuant to this part.

(b) Assessments levied on businesses pursuant to this part shall be levied on the basis of the estimated benefit to the businesses within the property and business improvement district. The city council may classify businesses for purposes of determining the benefit to the businesses of the improvements and activities provided pursuant to this part.

(c) Properties zoned solely for residential use, or that are zoned for agricultural use, are conclusively presumed not to benefit from the improvements and service funded through these assessments, and shall not be subject to any assessment pursuant to this part.

#### **36633. Time for contesting validity of assessment**

The validity of an assessment levied under this part shall not be contested in any action or proceeding unless the action or proceeding is commenced within 30 days after the resolution levying the assessment is adopted pursuant to Section 36626. Any appeal from a final judgment in an action or proceeding shall be perfected within 30 days after the entry of judgment.

#### **36634. Service contracts authorized to establish levels of city services**

The city council may execute baseline service contracts that would establish levels of city services that would continue after a property and business improvement district has been formed.

#### **36635. Request to modify management district plan**

The owners' association may, at any time, request that the city council modify the management district plan. Any modification of the management district plan shall be made pursuant to this chapter.

#### **36636. Modification of plan by resolution after public hearing; Adoption of resolution of intention**

(a) Upon the written request of the owners' association, the city council may modify the management district plan after conducting one public hearing on the proposed modifications. The city council may modify the improvements and activities to be funded with the revenue derived from the levy of the assessments by adopting a resolution determining to make the modifications after holding a public hearing on the proposed modifications. If the modification includes the levy of a new or increased assessment, the city council shall comply with Section 36623. Notice of all other public hearings pursuant to this section shall comply with both of the following:

(1) The resolution of intention shall be published in a newspaper of general circulation in the city once at least seven days before the public hearing.

(2) A complete copy of the resolution of intention shall be mailed by first class mail, at least 10 days before the public hearing, to each business owner or property owner affected by the proposed modification.

(b) The city council shall adopt a resolution of intention which states the proposed modification prior to the public hearing required by this section. The public hearing shall be held not more than 90 days after the adoption of the resolution of intention.

#### **36637. Reflection of modification in notices recorded and maps**

Any subsequent modification of the resolution shall be reflected in subsequent notices and maps recorded pursuant to Division 4.5 (commencing with Section 3100), in a manner consistent with the provisions of Section 36627.

### **CHAPTER 3.5. Financing**

#### **36640. Bonds authorized; Procedure; Restriction on reduction or termination of assessments**



(a) The city council may, by resolution, determine and declare that bonds shall be issued to finance the estimated cost of some or all of the proposed improvements described in the resolution of formation adopted pursuant to Section 36625, if the resolution of formation adopted pursuant to that section provides for the issuance of bonds, under the Improvement Bond Act of 1915 (Division 10 (commencing with Section 8500)) or in conjunction with Marks-Roos Local Bond Pooling Act of 1985 (Article 4 (commencing with Section 6584) of Chapter 5 of Division 7 of Title 1 of the Government Code). Either act, as the case may be, shall govern the proceedings relating to the issuance of bonds, although proceedings under the Bond Act of 1915 may be modified by the city council as necessary to accommodate assessments levied upon business pursuant to this part.

(b) The resolution adopted pursuant to subdivision (a) shall generally describe the proposed improvements specified in the resolution of formation adopted pursuant to Section 36625, set forth the estimated cost of those improvements, specify the number of annual installments and the fiscal years during which they are to be collected. The amount of debt service to retire the bonds shall not exceed the amount of revenue estimated to be raised from assessments over 30 years.

(c) Notwithstanding any other provision of this part, assessments levied to pay the principal and interest on any bond issued pursuant to this section shall not be reduced or terminated if doing so would interfere with the timely retirement of the debt.

#### **CHAPTER 4. Governance**

##### **36650. Report by owners' association; Approval or modification by city council**

(a) The owners' association shall cause to be prepared a report for each fiscal year, except the first year, for which assessments are to be levied and collected to pay the costs of the improvements, maintenance, and activities described in the report. The owners' association's first report shall be due after the first year of operation of the district. The report may propose changes, including, but not limited to, the boundaries of the property and business improvement district or any benefit zones within the district, the basis and method of levying the assessments, and any changes in the classification of property, including any categories of business, if a classification is used.

(b) The report shall be filed with the clerk and shall refer to the property and business improvement district by name, specify the fiscal year to which the report applies, and, with respect to that fiscal year, shall contain all of the following information:

(1) Any proposed changes in the boundaries of the property and business improvement district or in any benefit zones or classification of property or businesses within the district.

(2) The improvements, maintenance, and activities to be provided for that fiscal year.

(3) An estimate of the cost of providing the improvements, maintenance, and activities for that fiscal year.

(4) The method and basis of levying the assessment in sufficient detail to allow each real property or business owner, as appropriate, to estimate the amount of the assessment to be levied against his or her property or business for that fiscal year.

(5) The estimated amount of any surplus or deficit revenues to be carried over from a previous fiscal year.

(6) The estimated amount of any contributions to be made from sources other than assessments levied pursuant to this part.

(c) The city council may approve the report as filed by the owners' association or may modify any particular contained in the report and approve it as modified. Any modification shall be made pursuant to Sections 36635 and 36636.

The city council shall not approve a change in the basis and method of levying assessments that would impair an authorized or executed contract to be paid from the revenues derived from the levy of assessments, including any commitment to pay principal and interest on any bonds issued on behalf of the district.

##### **36651. Designation of owners' association to provide improvements, maintenance, and activities**

The management district plan may, but is not required to, state that an owners' association will provide the improvements, maintenance, and activities described in the management district plan. If the management district plan designates an owners' association, the city shall contract with the designated nonprofit corporation to provide services.



## **CHAPTER 5. Renewal**

### **36660. Renewal of district; Transfer or refund of remaining revenues; District term limit**

- (a) Any district previously established whose term has expired, or will expire, may be renewed by following the procedures for establishment as provided in this chapter.
- (b) Upon renewal, any remaining revenues derived from the levy of assessments, or any revenues derived from the sale of assets acquired with the revenues, shall be transferred to the renewed district. If the renewed district includes additional parcels or businesses not included in the prior district, the remaining revenues shall be spent to benefit only the parcels or businesses in the prior district. If the renewed district does not include parcels or businesses included in the prior district, the remaining revenues attributable to these parcels shall be refunded to the owners of these parcels or businesses.
- (c) Upon renewal, a district shall have a term not to exceed 10 years, or, if the district is authorized to issue bonds, until the maximum maturity of those bonds. There is no requirement that the boundaries, assessments, improvements, or activities of a renewed district be the same as the original or prior district.

## **CHAPTER 6. Disestablishment**

### **36670. Circumstances permitting disestablishment of district; Procedure**

- (a) Any district established or extended pursuant to the provisions of this part, where there is no indebtedness, outstanding and unpaid, incurred to accomplish any of the purposes of the district, may be disestablished by resolution by the city council in either of the following circumstances:
  - (1) If the city council finds there has been misappropriation of funds, malfeasance, or a violation of law in connection with the management of the district, it shall notice a hearing on disestablishment.
  - (2) During the operation of the district, there shall be a 30-day period each year in which assesses may request disestablishment of the district. The first such period shall begin one year after the date of establishment of the district and shall continue for 30 days. The next such 30-day period shall begin two years after the date of the establishment of the district. Each successive year of operation of the district shall have such a 30-day period. Upon the written petition of the owners or authorized representatives of real property or the owners or authorized representatives of businesses in the district who pay 50 percent or more of the assessments levied, the city council shall pass a resolution of intention to disestablish the district. The city council shall notice a hearing on disestablishment.
- (b) The city council shall adopt a resolution of intention to disestablish the district prior to the public hearing required by this section. The resolution shall state the reason for the disestablishment, shall state the time and place of the public hearing, and shall contain a proposal to dispose of any assets acquired with the revenues of the assessments levied within the property and business improvement district. The notice of the hearing on disestablishment required by this section shall be given by mail to the property owner of each parcel or to the owner of each business subject to assessment in the district, as appropriate. The city shall conduct the public hearing not less than 30 days after mailing the notice to the property or business owners. The public hearing shall be held not more than 60 days after the adoption of the resolution of intention.

### **36671. Refund of remaining revenues upon disestablishment or expiration without renewal of district; Calculation of refund; Use of outstanding revenue collected after disestablishment of district**

- (a) Upon the disestablishment or expiration without renewal of a district, any remaining revenues, after all outstanding debts are paid, derived from the levy of assessments, or derived from the sale of assets acquired with the revenues, or from bond reserve or construction funds, shall be refunded to the owners of the property or businesses then located and operating within the district in which assessments were levied by applying the same method and basis that was used to calculate the assessments levied in the fiscal year in which the district is disestablished or expires. All outstanding assessment revenue collected after disestablishment shall be spent on improvements and activities specified in the management district plan.



(b) If the disestablishment occurs before an assessment is levied for the fiscal year, the method and basis that was used to calculate the assessments levied in the immediate prior fiscal year shall be used to calculate the amount of any refund.

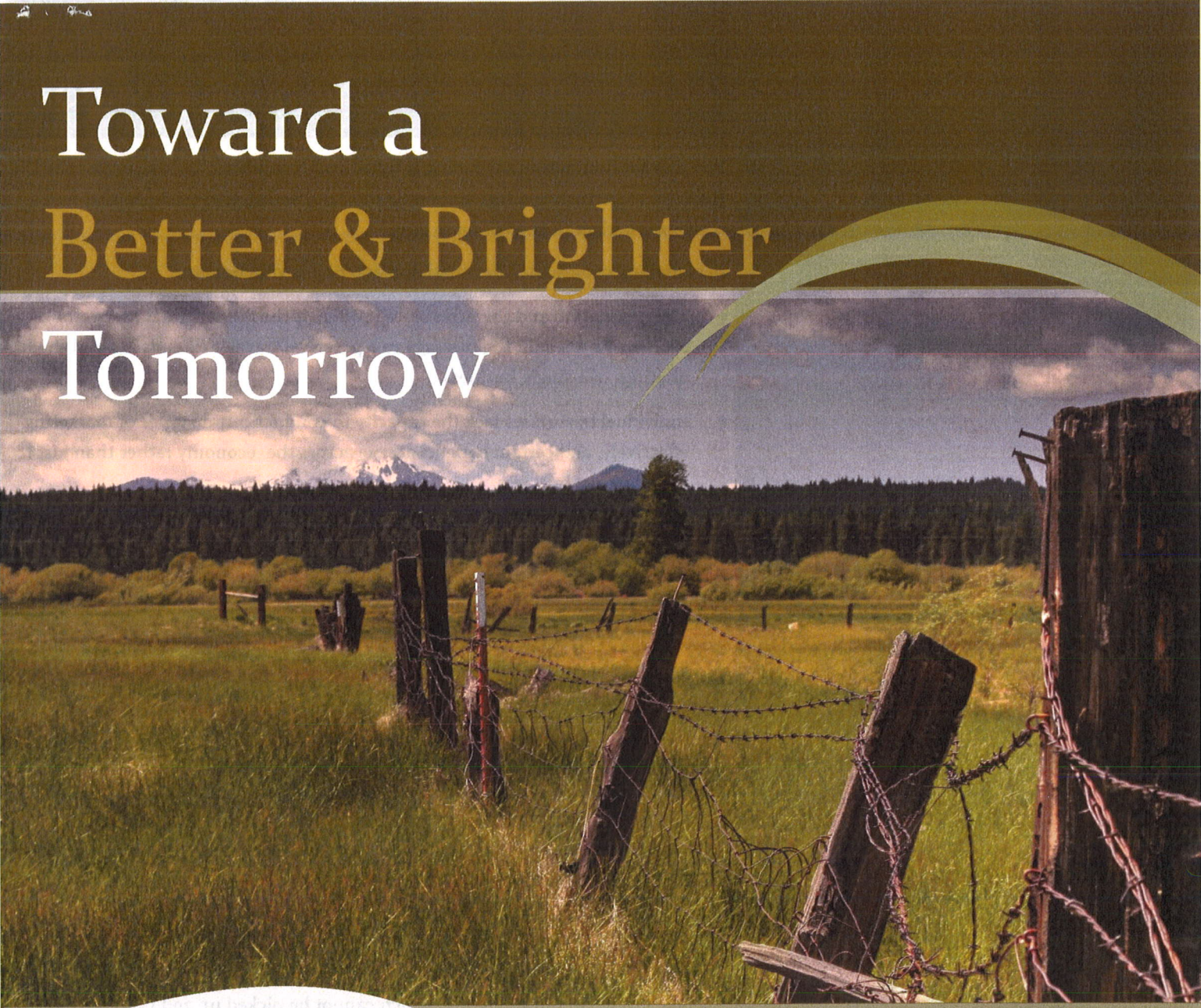
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## **APPENDIX 2 – ASSESSED BUSINESSES**

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# Toward a Better & Brighter Tomorrow



Driving Economic Development  
Improving Communities  
Building Bridges  
Creating a Sense of Pride & Place

**Feather River Tourism Association**





## The Rational for Tourism Improvement Districts

The case for destination marketing is broad and compelling. Indeed, across the US, there are more than 500 regional destination marketing organizations that had a combined budget of \$1.9 billion in 2015.

In summary, coordinated destination marketing is vital because:

- The destination and the experience it offers is the fundamental motivator of tourism. As a result, the message to a potential traveler extends beyond the offerings of a single business.
- Individual businesses lack the capacity to conduct certain types of marketing effectively, and certain benefits accrue across the economy rather than just to an individual business.
- Scale and marketing infrastructure also enhance promotional efficiencies, leveraging the impact of each marketing dollar.
- Destination marketing helps address challenges of a perishable tourism product and the seasonality of demand.

### What is a Tourism Improvement District (TID)?

- Created by 1989 Legislation
- Designed to create a stable source of funding for destination marketing
- "Pass through" assessment, paid by visitors, collected by lodging providers
- Funds must be spent on services or improvements that provide a specific benefit to lodging providers.
- Governed by lodging providers who collect the assessment.
- Currently 103 TIDs in California

### Conclusions from 10 Years of TID Research

The region experiences significantly increased spending on lodging, food & beverages.

Room prices are able to be increased in proportion to the increased demand.

The increased direct spending on lodging, food & beverages creates indirect effects that impact the supply chain and professional services.

Additional economic benefits occur when a portion of the additional income earned is spent in the economy again.

Without effective promotion, regions cede the economic benefits to competing destinations and fall behind the competition. It is a mistake from which it takes many years to recover.

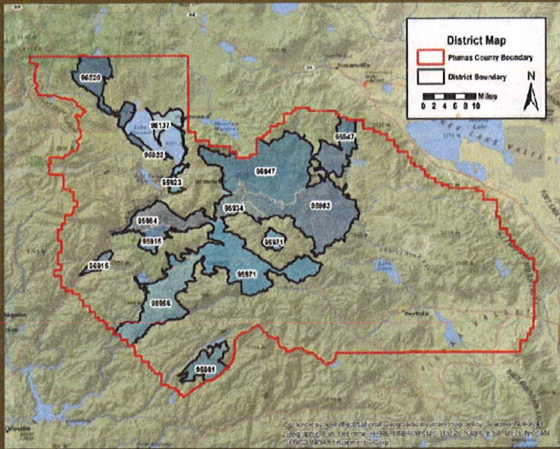
### The Seasonality of Demand

In manufacturing, inventory can be stored or redistributed to markets where demand is stronger, and seasonal fluctuations in demand can be managed effectively. This same degree of flexibility doesn't exist for many tourism-dependent businesses, the product of which is perishable, fixed in one market, and typically under more heavy demand during some seasons and days of the week than others. In the lodging sector, the product sold is a room night, which cannot be held over to another day. If a room goes unoccupied, the potential room night sale and associated revenue are lost. The hotel product depends heavily on infrastructure, which cannot be picked up and moved to another location. Also, the upfront investment of capital required in lodging, and the fixed nature of many operating costs, results in a situation in which successful ongoing operations are heavily dependent on demand reaching a "break even" level of operations. In situations in which demand is concentrated in peak periods, staffing can be challenging for employers and employees alike due to season duration.

Effective destination marketing helps address these challenges. By broadening potential visitors' understanding of a destination's offering, marketing is frequently designed to boost demand outside of the usual peak demand periods. This helps businesses make use of resources that would otherwise be idle, extends the duration of seasonal employment, and supports a better base for year-round jobs. This incremental activity supported by destination marketing can be critically important to successful and profitable operations in the tourism industry. The end result is a level of market demand that is more stable during the year, benefits local businesses, employees, and other stakeholders, and expands the tax base for a jurisdiction.

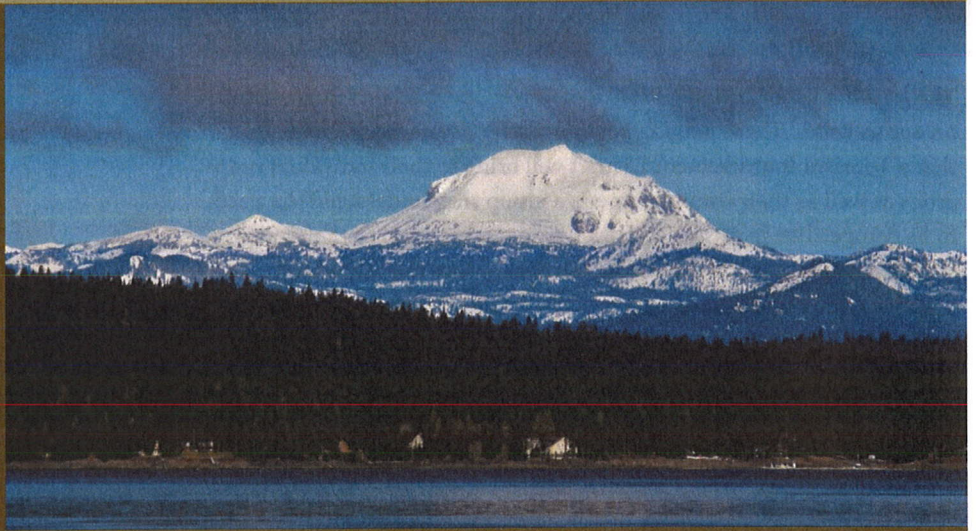


## District Boundaries



District boundary indicated by blue outline.

*Destination marketing organizations are champions of rural regions, shining a spotlight on places that may be otherwise overlooked by visitors and invigorating economies of under-served areas.*



## Mission & Vision

The vision of the Feather River Tourism Association is to realize the full potential of our region as a travel destination — to improve the quality of life of the people of our communities through an improved economy while preserving our natural resources — to drive a new era of development, growth, and opportunity for our regions.

Our mission is to increase visitation to lodging businesses in Plumas County by providing results oriented marketing, advertising and tourism resources.

## 5-Year Strategic Plan For Tourism District

**Market Lake Almanor, Indian Valley & Quincy Areas :** Professionally developed district marketing & communication plan including website and content management system

**Fund Regional Tourism Efforts:** Fund local marketing, event creation and promotion, and cultural and recreational projects through allocation of 37% of funds to individual regions

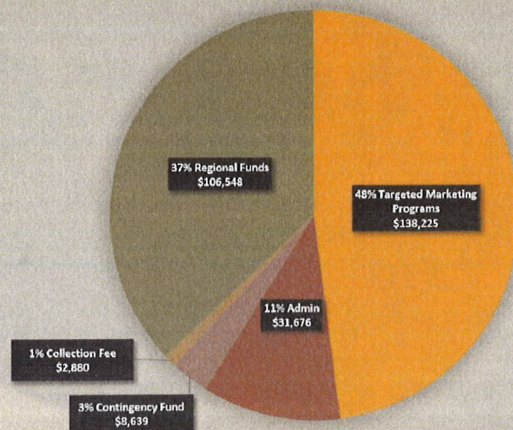
**County-Wide Recreation and Event Support and Promotion:** Promotion of regional recreational and cultural opportunities. Support recreational/event planning through Event Calendar and web based informational services

**Promote Group Travel, Small Group and Conference Services:** Target, market to, and aid in planning for Travel Groups, Clubs, Retreats and Corporate Conferences

**Communication, Public Relations, Community Outreach:** Promote and support business and community Brand awareness and use of services that will be provided. Engage in collaborative efforts with local, regional and national organizations, agencies and businesses related to travel and tourism

**Administration & Funding:** Board 5-Year focus on executing administrative tasks and maintaining plan for Long-Term Sustainability. Create Plan to obtain additional co-op funding with related tourism and travel agencies and businesses.

Estimated Year 1 Revenue \$287,968



*Research has shown that the average Return on Investment (ROI) is 20%*



## Support for Feather River Tourism District

The growing list of Lodging Providers who support this effort are listed on our website. These lodging providers have embraced the benefits that a Tourism Improvement District will bring to their individual properties as well as their community. As a group they understand the need to be competitive in attracting travelers to our area and to their lodging specifically, focusing on expanding our season into our "shoulder months". They understand that tourism marketing is most effective on a larger scale than they can afford individually. They have alleviated any concerns they have about implementing a TID by reading the research on return on investment of the over 101 TIDs in California and the overwhelming positive response of providers within these TIDs. In short, they want to be able to participate more actively with the large scale efforts of Visit California and the Shasta Cascade Wonderland Association, to create a branded marketing approach to attract visitors to the Feather River region, create a stable source of funding for area events and attractions, and be able to invest in infrastructure to enhance the experience of our visitors.

## Members of the Steering Committee

Susan Bryner, Coldwell Banker Property Management

Ghulam Fareed, Best Western Rose Quartz, Gold Pan Lodge

Todd Geer, Plumas Pines Resort

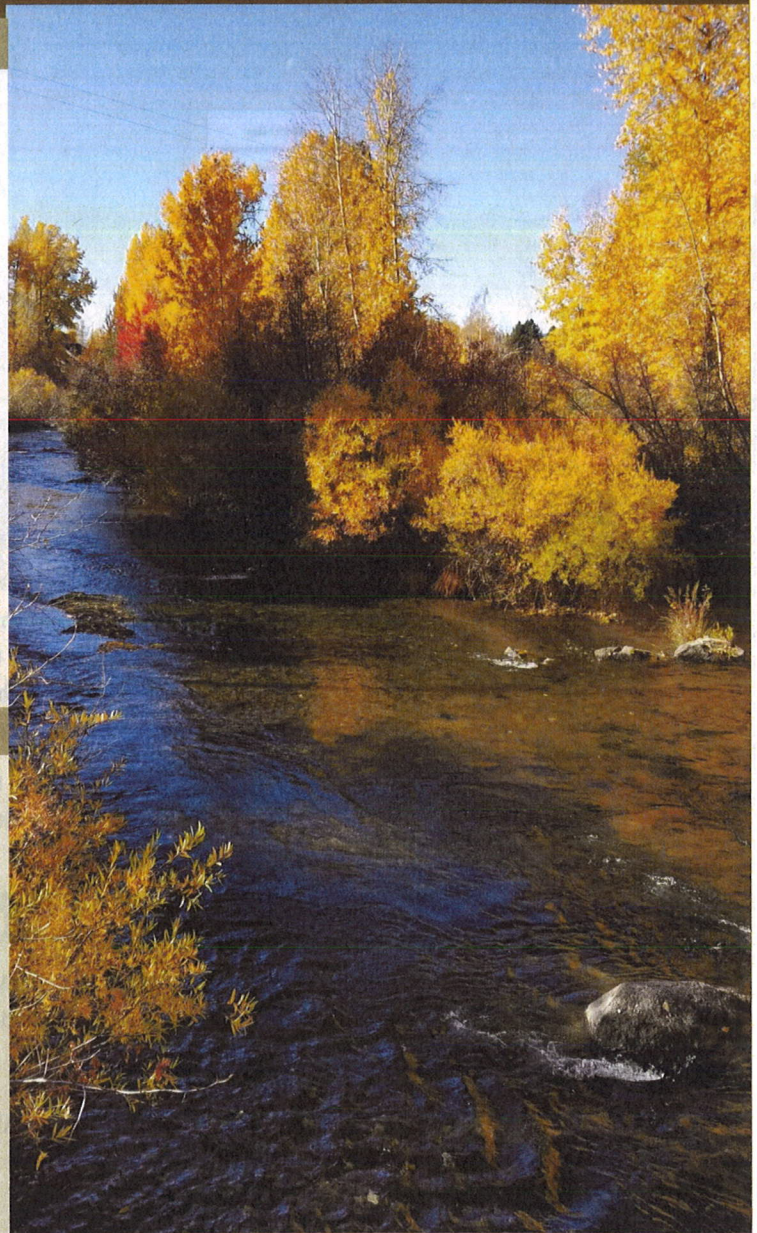
Karen Kleven, Feather River Land Trust

Ceci Reynolds, Quincy Vacation Rentals

Sharon Roberts, Saint Bernard Lodge

Jeff Titcomb, Director, Shasta Cascade Wonderland Association

Traci Wixted, Ranchito Motel



Toward a  
Better & Brighter  
Tomorrow

Feather River Tourism Association  
[www.FeatherRiverTourism.com](http://www.FeatherRiverTourism.com)



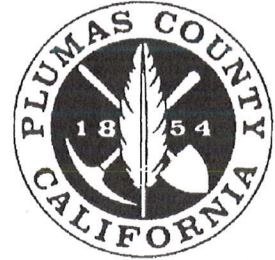
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## **DEPARTMENT OF HUMAN RESOURCES**

520 Main Street, Room 115, Quincy, California 95971

(530) 283-6444 FAX (530) 283-6160

Email: [nancyselvage@countyofplumas.com](mailto:nancyselvage@countyofplumas.com)



**DATE:** October 16, 2018

**TO:** The Honorable Board of Supervisors

**FROM:** Nancy Selvage, Human Resources Director

**SUBJECT: AGENDA ITEM FOR BOARD OF SUPERVISORS MEETING OF  
OCTOBER 16, 2018.**

**RE: ADOPT RESOLUTION TO AMEND THE PLUMAS COUNTY JOB  
CLASSIFICATION PLAN FOR CHIEF DEPUTY PUBLIC  
GUARDIAN/CONSERVATOR, RANGE 2397 DEPARTMENT 20430**

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### **IT IS RECOMMENDED THAT THE BOARD**

Approve Resolution to amend Plumas County's classification plan revising Social Services Chief Deputy Public Guardian/Conservator job description.

Authorize Social Services request to recruit and fill allocated 1 FTE Chief Deputy Public Guardian/Conservator, range – 2397.

### **BACKGROUND AND DISCUSSION**

This agenda item has previously come before the Board for review and based on the recommendation of the Board of Supervisors, the job description has been revised based on the feedback. This is the third revised job description for the Chief Deputy Public Guardian/Conservation.

The job description has been updated to add experience needed in financial, budgetary management, or estate investigation work as well as experience as a case worker services to incompetent, disabled or needy persons in all three qualifying options. Exhibit A includes both the current and proposed job description for the Chief Deputy Public Guardian/Conservator. I have attached the revised job description with the changes highlighted in red.

Below are the summary of the updated qualifications needed for this position with changes *italicized* in **bold** font:

#### **Training and Experience:**

Qualifications needed for this position:

##### **Option One:**

Completion of 24 semester units with emphasis in business or public administration, financial management and/or investment, social work/welfare, behavioral science, or a



related field, **AND**

Four years of experience in estate, financial or budgetary management, estate investigation work or providing case worker service to incompetent, disabled or needy persons.

**Option Two:**

A Bachelor's Degree from an accredited college with a major in social work, social welfare, human services, public administration, or business administration, **AND**

*Two years' experience in financial or budgetary management, estate investigation work or providing case worker service to incompetent, disabled or needy persons.*

**Option Three:**

Successful completion of a paralegal curriculum approved by the American Bar Association or Graduation from Law School, **AND**

*Two years' experience in financial or budgetary management, estate investigation work or providing case worker service to incompetent, disabled or needy persons.*

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**Note:** Additional \*qualifying experience may be substituted for the required education on a month-for-month basis.

*\*Qualifying social work case management includes direct case work management, such as: assessment, evaluation; conducting investigations of abuse and neglect; preparing court reports; responsibility for a long term caseload, monitoring compliance through home calls and other personal contact; collaboration with other agencies and linking clients to resources and programs; development of a case plan, modification of case plans as needed/required; and authority to impose sanctions or implement actions that impact services.*

This position will be responsible for the majority of the work in the Public Guardian's office. A strong emphasis on knowledge and experience relating to the law and court procedures will be important skills as well as financial and budgetary management. In addition to Social Services department, this position will be working a variety of agencies, the Courts, and closely with County Counsel's Department.

I am recommending the entry wage range of \$23.97 per hour. As of October 9, 2018, this third revised job description has been reviewed and approved by Operating Engineers Local #3. Exhibit B includes a five (5) year cost projection.

The Chief Deputy Public Guardian/Conservator position has been vacant for over a year while it has been under review. In anticipation of adopting the resolution, I am requesting to recruit and fill this position immediately.

Thank you for taking this matter under consideration.

Attached Exhibits:

- Exhibit A: Current and updated Chief Deputy Public Guardian/Conservator job descriptions
- Exhibit B: Five year cost projections
- Exhibit C: Social Services Organizational Chart



RESOLUTION NO. 2018-\_\_\_\_\_

**RESOLUTION TO AMEND FISCAL YEAR 2018-2019 JOB CLASSIFICATION PLAN  
FOR CHIEF DEPUTY PUBLIC GUARDIAN/CONSERVATOR DEPARTMENT #20430**

**WHEREAS**, Plumas County Personnel Rule 5.01 provides amendments to be made by resolution of the Fiscal Year 2018/2019 Job Classification Plan covering all positions in the County service; and

**WHEREAS**, this position is necessary in the daily operational needs Public Guardian Fund #20430; and

**WHEREAS**, this request was brought to the attention of the Human Resources Director who is now requesting approval of this resolution to amend the 2018-2019 Job Classification Plan for Chief Deputy Public Guardian/Conservator position, range 2397 Fund #20430; and

**WHEREAS**, Plumas County has met the meet and confer obligations for this position with Operating Engineers Local #3; and

**NOW, THEREFORE BE IT RESOLVED** by the Plumas County Board of Supervisors as follows:

Approve the amendments to the Fiscal Year 2018/2019 Job Classification Plan for the following position:

**Public Guardian Fund #20430**

Chief Deputy Public Guardian/Conservator, range - 2397

The foregoing Resolution was duly passed and adopted by the Board of Supervisors of the County of Plumas, State of California, at a regular meeting of said Board on the 16th day of October, 2018 by the following vote:

**AYES:** Supervisors:

**NOES:** Supervisors:

**ABSENT:** Supervisors:

\_\_\_\_\_  
Chair, Board of Supervisors

\_\_\_\_\_  
Clerk, Board of Supervisors



# Exhibit A:

- Current Chief Deputy Public  
Guardian/Conservator job description
- Proposed Chief Deputy Public  
Guardian/Conservator job description



**CHIEF DEPUTY PUBLIC GUARDIAN/CONSERVATOR****DEFINITION**

Under supervision, provides Public Guardian/Conservator services in the County Social Services Department; performs a variety of administrative and support duties in protecting the assets and health of people adjudicated as conservatees under the Public Conservators Office; carries out Public Guardian functions for persons who come under the jurisdiction of the County such as investigating the medical, psychological, financial and social background of persons referred for Conservatorship; provides ongoing case management services and does related work as required.

**DISTINGUISHING CHARACTERISTICS**

This is a specialized classification that is part of the Adult Protective Services (APS) services team. This classification is responsible for carrying out day-to-day activities that preserve the health, safety and well-being of conservatees who are under the jurisdiction of the County Public Guardian/Conservator and those persons accepted by referral for Representative Payee services. Performance of responsibilities requires knowledge of and the ability to learn complex legal, financial, and social services casework functions and responsibilities.

**REPORTS TO**

Social Services Director/Public Guardian/Public Conservator and Assistant Director/Program Manager

Deleted: and Social Services Adult Services Unit Supervisor

**CLASSIFICATIONS DIRECTLY SUPERVISED**

Deputy Public Guardian/Conservator I and II



## **CHIEF DEPUTY PUBLIC GUARDIAN/CONSERVATOR - 2**

### **EXAMPLES OF DUTIES**

- Plans, organizes, coordinates, and oversees Public Guardian/Conservator functions; reviews court documents and determines course of action to fulfill assigned responsibilities.
- Ensures that court mandates are achieved.
- Prepares and files appropriate Court documents.
- Investigates conservatorship referrals and determines the type of conservatorship needed, as well as the availability of other conservatorship options such as relatives.
- Completes forms and carries out processes for State and County aid programs.
- Meets with medical staff, social security representatives, social services staff, and mental health staff to develop resources for the appropriate assistance of clients.
- Maintains telephone contact with relatives and friends of clients.
- Works with County Counsel staff regarding legal matters related to the services provided by Guardian/Conservator.
- Makes Court appearances as necessary.
- Attends conferences to develop and maintain information concerning status and condition of conservatees.
- Attends multi-disciplinary meetings as necessary to coordinate case management services and to resolve case problems.
- Insures that conservatees and other customers receive available funds in a timely manner.
- Arranges for and conducts auctions as necessary.
- Performs inventories, appraisals, and storage of client property.
- Coordinates sale of property when necessary.
- Notifies relatives of the death of conservatees and plans for burial and estate disposition.
- Arranges for and/or transports conservatees to appointments.
- Makes quarterly visits to conservatees or as necessary.
- Assists in performing investigations of Elder and Dependent Adult abuse or neglect when it is determined based upon the information in the initial referral that the Elder or Dependent Adult may be in need of a Conservator.
- Take reports of Elder and Dependent Adult abuse or neglect from the public and community agencies and assist in determining the most appropriate course of action and / or referrals to community agencies.
- Develops and maintains a variety of accounting and fiscal records.
- Performs bank reconciliations.
- Operates office equipment and a computer.
- Performs on-call duties as assigned.

### **TYPICAL PHYSICAL REQUIREMENTS**

Sit for extended periods; frequently stand and walk; normal manual dexterity and eye-hand coordination; corrected hearing and vision to normal range; verbal communication; use of office equipment including computers, telephones, calculators, copiers, and FAX.

*Last Revised: 11/1999*



## **CHIEF DEPUTY PUBLIC GUARDIAN/CONSERVATOR - 3**

### **TYPICAL WORKING CONDITIONS**

Work is performed in an office; occasionally works outside of the office; continuous contact with staff and the public.

### **DESIRABLE QUALIFICATIONS**

#### **Knowledge of:**

- Functions and responsibilities of the County Public Guardian/Conservator.
- Rules, laws, and regulations governing the functions of the County Public Guardian/Conservator function.
- Court documents and legal procedures related to the operation of the County Public Guardian/Conservator.
- Principles of providing assistance to clients.
- Client problems requiring referral to other organizations and support services.
- Interviewing and record keeping techniques.
- Accounting and fiscal recordkeeping.

#### **Ability to:**

- Perform and carry out a variety of the functions of the County Public Guardian/Conservator.
- Analyze case problems and develop appropriate courses of action to meet client needs and requirements.
- Interview people, identify needs, and make appropriate referrals.
- Analyze and interpret laws and regulations related to Public Guardian/Conservator functions.
- Review and analyze a variety of court documents, fiscal records, and accounting information.
- Gather, organize, analyze, and present a variety of data and information.
- Prepare, clear, concise and accurate records and reports.
- Communicate with others from diverse socio-economic and cultural backgrounds.
- Elicit factual information from clients in difficult circumstances of deprivation or emotional disturbance.
- Develop community referral resources for clients.
- Effectively represent the Public Guardian/Conservator in contacts with the court system, clients, service providers, the public, community organizations, and other government's agencies.
- Establish and maintain cooperative working relationships.

*Last Revised: 11/1999*



## CHIEF DEPUTY PUBLIC GUARDIAN/CONSERVATOR - 4

### Training and Experience:

Qualifications needed for this position:

#### Option One:

Completion of 24 semester units with emphasis in business or public administration, financial management and/or investment, social work/welfare, behavioral science, or a related field, **AND**

Four years of experience in estate, financial or budgetary management, estate investigation work or providing case worker service to incompetent, disabled or needy persons.

#### Option Two:

A Bachelor's Degree from an accredited college with a major in social work, social welfare, human services, public administration, or business administration, **AND**

Two years' experience in financial or budgetary management, estate investigation work or providing case worker service to incompetent, disabled or needy persons.

**Deleted:** performing social casework or conservator case work.

#### Option Three:

**Deleted:** ¶

Successful completion of a paralegal curriculum approved by the American Bar Association or Graduation from Law School, **AND**

Two years' experience in financial or budgetary management, estate investigation work or providing case worker service to incompetent, disabled or needy persons.

**Deleted:** One year experience providing social casework or conservator casework.

**Note:** Additional \*qualifying experience may be substituted for the required education on a month-for-month basis.

*\*Qualifying social work case management includes direct case work management, such as: assessment, evaluation; conducting investigations of abuse and neglect; preparing court reports; responsibility for a long term caseload, monitoring compliance through home calls and other personal contact; collaboration with other agencies and linking clients to resources and programs; development of a case plan, modification of case plans as needed/required; and authority to impose sanctions or implement actions that impact services.*

**Deleted:** ¶

**Special Requirements:** Must possess a valid driver's license at time of application and a valid California Driver's License by the time of appointment. The valid California License must be maintained throughout employment.

Employees in this classification may be required to work holidays, weekends, and evenings. Some travel may be required. Ability to pass a background/criminal records check as authorized by sections 16501 of the California Welfare Institutions Code, section 11105.3 of the California Penal Code, and the ability to be bonded.

All County of Plumas employees are designated Disaster Service Workers through State law (California Government Code Section 3100-3109). Employment with Plumas County requires the affirmation of a loyalty oath to this effect. Employees are Required to complete all Disaster Service Work related training as assigned, and to return to work as ordered in the event of an emergency.

*Last Revised: 11/1999*



**CHIEF DEPUTY PUBLIC GUARDIAN/CONSERVATOR**

**DEFINITION**

Under supervision, provides Public Guardian/Conservator services in the County Social Services Department; performs a variety of administrative and support duties in protecting the assets and health of people adjudicated as conservatees under the Public Conservators Office; carries out Public Guardian functions for persons who come under the jurisdiction of the County such as investigating the medical, psychological, financial and social background of persons referred for Conservatorship; provides ongoing case management services and does related work as required.

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**REPORTS TO**

Social Services Director/Public Guardian/Public Conservator and Assistant Director/Program Manager

**CLASSIFICATIONS DIRECTLY SUPERVISED**

Deputy Public Guardian/Conservator I and II



## **CHIEF DEPUTY PUBLIC GUARDIAN/CONSERVATOR - 2**

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*Last Revised: 11/1999*



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#### **Knowledge of:**

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- Establish and maintain cooperative working relationships.



## CHIEF DEPUTY PUBLIC GUARDIAN/CONSERVATOR - 4

### **Training and Experience:**

Qualifications needed for this position:

#### **Option One:**

Completion of 24 semester units with emphasis in business or public administration, financial management and/or investment, social work/welfare, behavioral science, or a related field, **AND**

Four years of experience in estate, financial or budgetary management, estate investigation work or providing case worker service to incompetent, disabled or needy persons.

#### **Option Two:**

A Bachelor's Degree from an accredited college with a major in social work, social welfare, human services, public administration, or business administration, **AND**

Two years' experience in financial or budgetary management, estate investigation work or providing case worker service to incompetent, disabled or needy persons

#### **Option Three:**

Successful completion of a paralegal curriculum approved by the American Bar Association or Graduation from Law School, **AND**

Two years' experience in financial or budgetary management, estate investigation work or providing case worker service to incompetent, disabled or needy persons

**Note:** Additional \*qualifying experience may be substituted for the required education on a month-for-month basis.

*\*Qualifying social work case management includes direct case work management, such as: assessment, evaluation; conducting investigations of abuse and neglect; preparing court reports; responsibility for a long term caseload, monitoring compliance through home calls and other personal contact; collaboration with other agencies and linking clients to resources and programs; development of a case plan, modification of case plans as needed/required; and authority to impose sanctions or implement actions that impact services.*

**Special Requirements:** Must possess a valid driver's license at time of application and a valid California Driver's License by the time of appointment. The valid California License must be maintained throughout employment.

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*Last Revised: 11/1999*



# Exhibit B:

Five year cost projections



**MISC PERS**

Chief Deputy Public Guardian/Conservator

Step A Step B Step C Step D Step E  
FY 18/19 FY 19/20 FY 20/21 FY 221/22 FY 22/23

	Current				
<b>Old range \$17.80</b>	\$ 37,024.00	\$ 38,875.00	\$ 40,830.00	\$ 42,890.00	\$ 45,053.00
Retirement	\$ 8,367.42	\$ 9,835.38	\$ 11,187.42	\$ 12,523.88	\$ 13,335.69
FICA / Medicare	\$ 2,832.34	\$ 2,973.94	\$ 3,123.50	\$ 3,281.09	\$ 3,446.55
<b>Total</b>	\$ 48,223.76	\$ 51,684.31	\$ 55,140.92	\$ 58,694.97	\$ 61,835.24
<b>Proposed Increase \$23.97</b>	\$ 49,858.00	\$ 52,354.00	\$ 54,974.00	\$ 57,741.00	\$ 60,632.00
Retirement	\$ 11,267.91	\$ 13,245.56	\$ 15,062.88	\$ 16,860.37	\$ 17,947.07
FICA/Medicare	\$ 3,814.14	\$ 4,005.08	\$ 4,205.51	\$ 4,417.19	\$ 4,417.19
<b>Total</b>	\$ 64,940.05	\$ 69,604.64	\$ 74,242.39	\$ 79,018.56	\$ 82,996.26
Five Year Differential	Difference \$ (16,716.29)				
		\$ (17,920.33)			
			\$ (19,101.47)		
				\$ (20,323.59)	\$ (21,161.02)
Five year increase to Personnel Budget	\$ (95,222.70)				



PLUMAS COUNTY DEPARTMENT OF SOCIAL SERVICES & PUBLIC GUARDIAN

DIRECTOR

