



# AGENDA

## BOARD OF DIRECTORS MEETING

Wednesday, August 14, 2024, 6:00 pm  
138 S. Brandon Rd., Fallbrook, CA 92028  
Administrative Office, 1<sup>st</sup> Floor Community Room  
*\*All meetings are hybrid unless otherwise noted.*

**\*Please contact the Board clerk for language translation services 48 hours in advance of the meeting. In accordance with California Government Code Section 54953 teleconferencing will be used for this meeting. Board members, staff and members of the public will be able to participate by webinar by using the following link: <https://us02web.zoom.us/j/85092529608?pwd=Y21JN1IyVUc2T3pnditjS3pQNHkxZz09> Meeting ID: 850 9252 9608. Passcode: 336866 Participants will need to download the Zoom app on their mobile device. Members of the public will also be able to participate by telephone using the following number: +1-669-900-6833 Meeting ID: 850 9252 9608. Passcode: 336866**

**A. CALL MEETING TO ORDER | ROLL CALL | ESTABLISH A QUORUM | PLEDGE OF ALLEGIANCE-**

**B. APPROVAL OF THE AGENDA-**

**C. PUBLIC COMMENTS - ANNOUNCEMENT**

Members of the public may address the Board regarding any item listed on the Agenda at the time the item is being considered. Members of the public may also speak on any item not listed on the Agenda which falls within the subject matter jurisdiction of the District immediately prior to Board Comments & Items for Subsequent Meetings section below. Members of the public attending in-person need to fill-out a "Request to Speak" card and those attending by webinar need to raise their hand at this time and identify the Agenda item they would like to speak on. The Board has a policy limiting any speaker to not more than five minutes.

**D. CONSENT ITEMS -**

- D1. Minutes of July 3, 2024, Finance Meeting
- D2. Minutes of July 10, 2024, Board of Directors Meeting
- D3. Finance Committee Report – Directors Jeffries – Recommendation from the Finance Committee to transfer \$245,000.00 from the LAIF fund to the Operating account.
- D4. Community Health & Wellness Center Administrator Report- Theresa Geracitano
- D5. Chief Executive Officer Report – Rachel Mason
- D6. General Counsel Report– Jeffrey Scott
- D7. Approval of 2024 CEO Contract Amendment
- D8. Consideration of Resolution 464– San Diego County Community Enhancement Grant Application
- D9. 2024 Biennial Review of District’s Conflict of Interest Code

**E. DISCUSSION POSSIBLE ACTION ITEMS-**

- E1. Appointment of Director Howard Salmon as Secretary
- E2. Year End Review by Theresa, Bianca, Katia, Jasmine
- E3. Employee Handbook Review and Adoption – CEO Rachel Mason
- E4. Fiscal Year End Review of Districts Financial Investments- Director Jennifer Jeffries
- E5. FY 23/24 Q4 Grant Impact Reports from Michelle’s Place and Fallbrook Senior Center

**F. BOARD MEMBER COMMENTS & ITEMS FOR SUBSEQUENT MEETINGS -**

**Announcements of upcoming events:**

See the District website event calendar at <https://www.fallbrookhealth.org/community-health-wellness-center>

**Facilities Committee Meeting Wednesday, August 21, 2024, at 10:00 am**

**September 11, 2024, Board of Directors Meeting has been Cancelled.**

**CSDA Annual Meeting – Indian Wells, CA, September 10-12, 2024**

**ACHD Annual Meeting – Sacramento, CA, September 25-27, 2024**

**Next Board of Directors Meeting Wednesday, October 9, 2024, at 6:00 pm**

**G. ADJOURNMENT-**

**NOTE:** I certify that on Friday, August 9, 2024 I posted a copy of the foregoing agenda near the regular meeting place of the Board of Directors of Fallbrook Regional Health District, said time being at least 72 hours in advance of the meeting. The American with Disabilities Act provides that no qualified individual with a disability shall be excluded from participation in, or denied the benefits of District business. If you need assistance to participate in this meeting, please contact the District office 24 hours prior to the meeting at 760-731-9187.

**\*Please contact the Board clerk for language translation services 48 hours before the meeting.**

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Executive Assistant / Board Clerk



**MINUTES**  
**FINANCE COMMITTEE**  
**Wednesday, July 3, 2024, at 10:00 A.M.**  
**Administrative Office, 1<sup>st</sup> Floor Community Room**  
**138 S. Brandon Rd., Fallbrook, CA 92028**

In accordance with California Government Code Section 54953 teleconferencing was used for this meeting. Board members, staff and members of the public were able to participate in the webinar.

**1. Call to Order/Roll Call**

In Attendance- Directors Jennifer Jeffries and Mike Stanicek, CEO Rachel Mason, Chief Administrative Officer Judith Oswald, Community Health & Wellness Center Administrator Theresa Geracitano, Executive Assistant Raquel Williams, CPA Susan Woodward

**2. Public Comments – Announcement- NONE**

**3. Review of Financial Statements for May 2024**

Report 1 – Balance Sheet of **May 2024**

Report 2 – Income Statement for the Month Ended **May 2024 & Fiscal Year to Date**

Report 3 – Profit & Loss Actual vs YTD Budget – **May 2024**

Report 4 – Local Agency Investment Fund (LAIF) Statement **May 2024**

Report 5 – CalTrust Statement – **May 2024**

Report 6 – California CLASS Statement- May 2024- Discussion was held on rebalancing the three investment instruments. Director Jeffries asked Director Stanicek for any words of wisdom on the investment strategy. They concurred that it has been consistent and should stay the way it is, they will review them again after the elections in November.

FRHD Compliance Report

Report 7 - Check Detail Report as of **May 2024**

Report 8 – VISA Credit Card Statement – **May 2024**

Report 9 – Community Development Disbursement as of **May 2024**- Director Stanicek likes the new format it allows for more transparency.

**5. Discussion Items-**

None

**6. Board Member Comments and Future Agenda Item-**

The committee is pleased with the updated reports, Director Stanicek added that it allows for more clarity and keeps the District as transparent as possible.

**Next Finance Committee Meeting Wednesday, August 7, 2024, at 10:00 am.**

**7. Adjournment-** There being no further business the meeting was adjourned at 10:15 am.



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Executive Assistant/Board Clerk

DRAFT



**MINUTES**  
**BOARD OF DIRECTORS MEETING**  
**Wednesday, July 10, 2024, 6:00 pm**  
**Community Health & Wellness Center**  
**1636 E. Mission Road., Fallbrook, CA 92028**

*\*All meetings are hybrid unless otherwise noted.*

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**A. CALL MEETING TO ORDER | ROLL CALL | ESTABLISH A QUORUM | PLEDGE OF ALLEGIANCE-**

Chair Bill Leach called the meeting to order at 6:00 p.m. and led the Pledge of Allegiance. In attendance: Chair Bill Leach, Directors Barbara Mroz, Jennifer Jeffries, Mike Stanicek, Howard Salmon, CEO Rachel Mason, Accountant Susan Woodward, Legal Counsel Jeffrey Scott  
Staff members: Chief Administrative Officer Judith Oswald, Community Health & Wellness Center Administrator Theresa Geracitano, Programs Coordinator Bianca Heyming, Community Resource Navigator Katia Elizondo Marquez, Outreach & Communications Coordinator Jasmine Thomas, Admin Office Receptionist Tracy Rosalee, Wellness Center Receptionist Patty Taylor, Executive Assistant/Board Clerk Raquel Williams, Village News Photographer David, and Members of the Public

**B. APPROVAL OF THE AGENDA-**

**Action:** It was moved by Director Salmon seconded by Director Mroz to approve the agenda as presented.

**Motion carried (5-0)**

Director Leach...Aye  
Director Mroz...Aye  
Director Jeffries...Aye  
Director Stanicek...Aye  
Director Salmon...Aye

**C. PRESENTATION – 2024-2025 COMMUNITY HEALTH CONTRACTS GRANTS  
BIG CHECK PRESENTATION (List of Grantees and dollar amounts attached to the minutes.)**

**D. PUBLIC COMMENTS – ANNOUNCEMENT- NONE**

**E. CONSENT ITEMS -**

- E1. Minutes of June 5, 2024, Finance Meeting
- E2. Minutes of June 12, 2024, Board of Directors Meeting
- E3. Minutes of June 12, 2024, Foundation Board of Directors Meeting
- E4. Minutes of June 19, 2024, Facilities Committee Meeting
- E5. Minutes of June 19, 2024, Strategic Planning Committee Meeting
- E6. Minutes of June 26, 2024, Governmental & Public Engagement Committee Meeting
- E7. Finance Committee Report – Directors Jeffries and Stanicek
- E8. Facilities Committee Report – Directors Jeffries and Mroz
- E9. Strategic Planning Committee Report – Directors Leach and Mroz

- E10. Governmental & Public Engagement Committee Report – Directors Stanicek and Leach
- E11. Community Health & Wellness Center Administrator Report- Theresa Geracitano
- E12. Chief Executive Officer Report – Rachel Mason
- E13. General Counsel Report– Jeffrey Scott

**Action:** It was moved by Director Jeffries seconded by Director Mroz to approve the consent items as presented.

**Motion carried (5-0)**

Director Leach...Aye  
Director Mroz....Aye  
Director Jeffries...Aye  
Director Stanicek...Aye  
Director Salmon...Aye

**F. DISCUSSION POSSIBLE ACTION ITEMS-**

F1. District Policy Manual

Chair Leach opened the discussion on the Updated Policy Manual. Legal Counsel Jeff Scott commented that it is an organic document with flexibility to add things when necessary. Director Salmon commented that if Legal Counsel Jeff Scott and CEO Rachel Mason have approved the policy, then the Board should as well.

**Action:** It was moved by Director Salmon seconded by Director Stanicek to approve the District Policy Manual as presented.

**Motion carried (5-0)**

Director Leach...Aye  
Director Mroz....Aye  
Director Jeffries...Aye  
Director Stanicek...Aye  
Director Salmon...Aye

**G. BOARD MEMBER COMMENTS & ITEMS FOR SUBSEQUENT MEETINGS –**

Director Jeffries shared her experience with the Board about FRHD Staff members Katia Elizondo Marquez and Jasmine Thomas who joined her at a career day for elementary students. The students enjoyed hearing about Katia and Jasmine’s careers at FRHD.

**H. CLOSED SESSION**

- H1. Personnel Matters pursuant to Government Code Section 54957(b)(1) – CEO Annual Evaluation

**I. RETURN TO OPEN SESSION**

Return to open session at 7:25 p.m.  
The Board discussed the CEO evaluation in closed session and directed legal counsel to take appropriate action.

**J. ADJOURNMENT-**

There being no further business the meeting was adjourned at 7:30 pm.

A handwritten signature in blue ink that reads "August Kilbis". The signature is fluid and cursive, with the first name "August" and last name "Kilbis" clearly legible.

Executive Assistant / Board Clerk

DRAFT

**Community Health Contract Grant  
 Applications Awarded for FY 2024.2025**

Grant #	Agency Name	Program Name	Amount Requested			
435	Boys & Girls Club	Water Safety	\$21,710.00			
436	Boys & Girls Club	Triple Play	\$40,489.54			
437	D'Vine Path	Life I Can Healthy Lifestyle 2024	\$51,000.00			
438	Fallbrook Food Pantry	Alleviating Hunger in Greater Fallbrook	\$85,000.00			
439	Fallbrook Senior Center	Nutrition Program 24.25	\$50,000.00			
440	Foundation for Senior Care	Door Through Door- Senior & Disabled Transportation- Adult Day Care- Senior Care Advocacy	\$99,450.00			
441	Palomar Family Counseling Service	Mental Health Matters (formerly Healthy Bodies, Healthy Minds)	\$48,828.00			
442	REINS	Equine Assisted Mental Health Program	\$25,000.00			
443	San Diego Children's Discovery Museum	Access for All Mobile Children's Museum Scholarships for Fallbrook Children	\$20,000.00			
444	Vista Community Clinic	Poder Popular de Fallbrook: Engaging Fallbrook Residents in Community Health	\$40,000.00			
445	Voices for Children	Court Appointed Special Advocate (CASA) program	\$15,000.00			
			\$496,477.54			



# CONSENT ITEMS

## D3. FINANCE PACKET

# Fallbrook Regional Health District

## Report #1 - Balance Sheet Comparison

As of June 30, 2024

	TOTAL		
	AS OF JUN 30, 2024	AS OF MAY 31, 2024 (PP)	% CHANGE
<b>ASSETS</b>			
Current Assets			
Bank Accounts			
Five Star Bank Account	592,412.46	592,412.46	0.00 %
Pacific Western Bank - Checking	790,006.66	766,588.08	3.05 %
Petty Cash	138.47	138.47	0.00 %
<b>Total Bank Accounts</b>	<b>\$1,382,557.59</b>	<b>\$1,359,139.01</b>	<b>1.72 %</b>
Other Current Assets			
Interest Receivable - LAIF	0.00	0.00	
Loan Receivable - FRHD Foundation	25,000.00	25,000.00	0.00 %
Prepaid Insurance	0.00	3,026.54	(100.00 %)
Reimbursement Receivable - CDD	(476.08)	(8.48)	(5,514.15 %)
Tax Apportionment Receivable	21,140.54	14,282.13	48.02 %
<b>Total Other Current Assets</b>	<b>\$45,664.46</b>	<b>\$42,300.19</b>	<b>7.95 %</b>
<b>Total Current Assets</b>	<b>\$1,428,222.05</b>	<b>\$1,401,439.20</b>	<b>1.91 %</b>
Fixed Assets			
Accumulated Depreciation - All Buildings	(303,351.40)	(297,717.40)	(1.89 %)
Construction in Progress	1,331,258.92		
E. Mission Road	1,441,539.86	1,441,539.86	0.00 %
E. Mission Road - Improvements	464,776.05	1,786,485.05	(73.98 %)
E. Mission Road - Land	360,629.00	360,629.00	0.00 %
<b>Total E. Mission Road</b>	<b>2,266,944.91</b>	<b>3,588,653.91</b>	<b>(36.83 %)</b>
Equipment	85,471.17	85,471.17	0.00 %
Equipment - Depreciation	(64,538.04)	(64,993.62)	0.70 %
S. Brandon Road	161,578.00	161,578.00	0.00 %
S. Brandon Road - Improvements	233,355.76	242,905.68	(3.93 %)
S. Brandon Road - Land	129,662.00	129,662.00	0.00 %
<b>Total S. Brandon Road</b>	<b>524,595.76</b>	<b>534,145.68</b>	<b>(1.79 %)</b>
<b>Total Fixed Assets</b>	<b>\$3,840,381.32</b>	<b>\$3,845,559.74</b>	<b>(0.13 %)</b>
Other Assets			
California Class	1,052,142.31	1,047,506.78	0.44 %
CalTrust - Liquidity Fund	1,033,684.98	1,029,114.23	0.44 %
CalTrust - Medium Term Fund	4,876,553.71	4,845,705.88	0.64 %
LAIF	1,337,311.28	1,486,311.28	(10.02 %)
Note Receivable - East Alvarado Street	0.00	0.00	
<b>Total Other Assets</b>	<b>\$8,299,692.28</b>	<b>\$8,408,638.17</b>	<b>(1.30 %)</b>
<b>TOTAL ASSETS</b>	<b>\$13,568,295.65</b>	<b>\$13,655,637.11</b>	<b>(0.64 %)</b>

# Fallbrook Regional Health District

## Report #1 - Balance Sheet Comparison

As of June 30, 2024

	TOTAL		
	AS OF JUN 30, 2024	AS OF MAY 31, 2024 (PP)	% CHANGE
<b>LIABILITIES AND EQUITY</b>			
Liabilities			
Current Liabilities			
Accounts Payable			
Accounts Payable (A/P)	1,143,142.54	976,002.69	17.12 %
<b>Total Accounts Payable</b>	<b>\$1,143,142.54</b>	<b>\$976,002.69</b>	<b>17.12 %</b>
Credit Cards			
Umpqua Bank - Credit Card	0.00	0.00	
<b>Total Credit Cards</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>0.00%</b>
Other Current Liabilities			
Payroll - Tax Payable	9,050.66	9,270.51	(2.37 %)
Payroll - Vacation & Sick Payable	40,207.61	39,825.84	0.96 %
Payroll - Wages Payable	22,291.47	22,989.10	(3.03 %)
Refundable Deposits - Rental Security	480.00	480.00	0.00 %
Simple IRA Plan - Payable	5,184.70	5,231.17	(0.89 %)
<b>Total Other Current Liabilities</b>	<b>\$77,214.44</b>	<b>\$77,796.62</b>	<b>(0.75 %)</b>
<b>Total Current Liabilities</b>	<b>\$1,220,356.98</b>	<b>\$1,053,799.31</b>	<b>15.81 %</b>
<b>Total Liabilities</b>	<b>\$1,220,356.98</b>	<b>\$1,053,799.31</b>	<b>15.81 %</b>
Equity			
Community Development Disbursement	8,447,578.12	8,596,578.12	(1.73 %)
Opening balance equity	0.00	0.00	
Retained Earnings	0.00	0.00	
Unrestricted Operations Fund	2,878,900.88	2,878,900.88	0.00 %
Net Income	1,021,459.67	1,126,358.80	(9.31 %)
<b>Total Equity</b>	<b>\$12,347,938.67</b>	<b>\$12,601,837.80</b>	<b>(2.01 %)</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$13,568,295.65</b>	<b>\$13,655,637.11</b>	<b>(0.64 %)</b>

# Fallbrook Regional Health District

## Report #2 - Profit and Loss & Fiscal YTD

June 2024

	TOTAL	
	JUN 2024	JUL 2023 - JUN 2024 (YTD)
<b>Income</b>		
Program Fees		500.00
Property Tax Revenue	21,140.54	2,494,926.18
Rental Income	1,105.00	3,145.00
Wellness Center Income - Event/Space Rental	50.00	1,200.00
<b>Total Income</b>	<b>\$22,295.54</b>	<b>\$2,499,771.18</b>
<b>GROSS PROFIT</b>	<b>\$22,295.54</b>	<b>\$2,499,771.18</b>
<b>Expenses</b>		
Advertising & Promotions	2,926.80	22,042.02
Ask My Accountant		0.00
Auto Expenses	124.68	1,991.57
Bank Fees & Service Charges		35.00
Community Health Contracts		
Bonsall/Fallbrook Little League		5,000.00
Boys & Girls Club of North County		62,258.00
Boys Warriors Soccer Booster, Inc.		5,000.00
Community Health Systems, Inc.		60,000.00
Fallbrook Band Boosters		5,000.00
Fallbrook Food Pantry		75,000.00
Fallbrook Senior Citizens		47,000.00
Foundation for Senior Care		140,000.00
Michelle's Place Cancer Ctr		48,662.00
NC Fire JPA (Ambulance)	155,284.68	155,284.68
NC Fire JPA (EMSO)		64,064.31
Palomar Family Counseling		66,860.00
Reins Therapeutic Horsemanship Program		25,000.00
<b>Total Community Health Contracts</b>	<b>155,284.68</b>	<b>759,128.99</b>
District Direct Care Services		
District Sponsored Events		4,940.49
Health Services & Clinics	7,710.00	60,935.92
<b>Total District Direct Care Services</b>	<b>7,710.00</b>	<b>65,876.41</b>
Dues & Subscriptions	963.00	21,435.97
Education & Conferences	5,666.14	32,785.00
Equipment Lease	1,669.84	19,419.76
General Insurance	2,715.62	32,803.82
IT Services	600.00	7,600.00

# Fallbrook Regional Health District

## Report #2 - Profit and Loss & Fiscal YTD

June 2024

	TOTAL	
	JUN 2024	JUL 2023 - JUN 2024 (YTD)
Legal & Accounting services		
Accounting	3,500.00	40,871.25
Independent Audit		15,500.00
Legal	31,855.00	41,410.00
<b>Total Legal &amp; Accounting services</b>	<b>35,355.00</b>	<b>97,781.25</b>
Medical Records Expense	3,267.40	32,809.01
Meeting Expenses	282.47	2,743.04
Office Expenses		241.50
General Office Expenses	677.36	5,247.31
Maintenance & Repairs	7,820.26	80,910.54
Office Equipment & Fixtures		9,595.23
Office Supplies	1,176.43	16,765.43
Postage & Shipping		444.60
Software & Website	1,467.74	19,276.57
<b>Total Office Expenses</b>	<b>11,141.79</b>	<b>132,481.18</b>
Other Tax and Licenses		25.00
Payroll Expenses		
Board Stipends	1,543.50	22,601.25
Employee Benefits	8,473.74	97,053.11
Payroll Processing Fees	263.23	3,329.87
Payroll Taxes	4,683.29	56,677.86
Salaries	59,775.55	704,952.20
Simple IRA Match	1,781.79	17,564.78
Vacation & Sick Leave	381.77	(6,946.35)
Workers Compensation	310.92	4,639.54
<b>Total Payroll Expenses</b>	<b>77,213.79</b>	<b>899,872.26</b>
Property Management Fees	562.50	3,262.50
Utilities		
Cell Phones	350.00	4,200.00
General Utilities	2,773.53	33,220.94
Internet/Telephone	1,995.52	15,024.00
<b>Total Utilities</b>	<b>5,119.05</b>	<b>52,444.94</b>
<b>Total Expenses</b>	<b>\$310,602.76</b>	<b>\$2,184,537.72</b>
NET OPERATING INCOME	<b>\$ (288,307.22)</b>	<b>\$315,233.46</b>
Other Income		
Interest/Dividend Income	25,082.83	318,326.04
Unrealized Gain/Loss - LAIF		39,669.25
Unrealized Gain/Loss CalTrust - Medium Term	14,971.28	60,497.48
<b>Total Other Income</b>	<b>\$40,054.11</b>	<b>\$418,492.77</b>

# Fallbrook Regional Health District

## Report #2 - Profit and Loss & Fiscal YTD

June 2024

	TOTAL	
	JUN 2024	JUL 2023 - JUN 2024 (YTD)
Other Expenses		
Community Development Disbursements	(148,532.40)	(344,859.49)
Depreciation Expense		
Depreciation Expense - Brandon Road	133.92	16,424.04
Depreciation Expense - Mission Road	5,044.50	49,083.00
<b>Total Depreciation Expense</b>	<b>5,178.42</b>	<b>65,507.04</b>
Other Miscellaneous Expense		(8,380.99)
<b>Total Other Expenses</b>	<b>\$ (143,353.98)</b>	<b>\$ (287,733.44)</b>
NET OTHER INCOME	<b>\$183,408.09</b>	<b>\$706,226.21</b>
NET INCOME	<b>\$ (104,899.13)</b>	<b>\$1,021,459.67</b>

**Fallbrook Regional Health District**  
**Report #3 - Budget vs. Actuals: FY 23-24 - Administrative Class**  
 July 2023 - June 2024

	Administrative			
	Actual	Budget	over Budget	% of Budget
<b>Income</b>				
Property Tax Revenue	2,494,926.18	2,277,713.46	217,212.72	109.54%
Rental Income	2,720.00	35,601.25	(32,881.25)	7.64%
<b>Total Income</b>	<b>\$ 2,497,646.18</b>	<b>\$ 2,313,314.71</b>	<b>\$ 184,331.47</b>	<b>107.97%</b>
<b>Gross Profit</b>	<b>\$ 2,497,646.18</b>	<b>\$ 2,313,314.71</b>	<b>\$ 184,331.47</b>	<b>107.97%</b>
<b>Expenses</b>				
Advertising & Promotions	9,267.80	30,575.00	(21,307.20)	30.31%
Auto Expenses	1,486.80	1,860.72	(373.92)	79.90%
Community Health Contracts			0.00	
Boys & Girls Club of North County	62,258.00	57,258.00	5,000.00	108.73%
Community Health Systems, Inc.	60,000.00	60,000.00	0.00	100.00%
Fallbrook Food Pantry	75,000.00	75,000.00	0.00	100.00%
Fallbrook Senior Citizens	47,000.00	47,000.00	0.00	100.00%
Foundation for Senior Care	140,000.00	140,000.00	0.00	100.00%
Michelle's Place Cancer Ctr	48,662.00	48,662.00	0.00	100.00%
NC Fire JPA (Ambulance)	155,284.68	195,000.00	(39,715.32)	79.63%
Palomar Family Counseling	66,860.00	66,860.00	0.00	100.00%
Reins Therapeutic Horsemanship Program	25,000.00	25,000.00	0.00	100.00%
<b>Total Community Health Contracts</b>	<b>\$ 680,064.68</b>	<b>\$ 714,780.00</b>	<b>\$ (34,715.32)</b>	<b>95.14%</b>
District Direct Care Services			0.00	
District Sponsored Events	1,432.91	2,250.00	(817.09)	63.68%
<b>Total District Direct Care Services</b>	<b>\$ 1,432.91</b>	<b>\$ 2,250.00</b>	<b>\$ (817.09)</b>	<b>63.68%</b>
Dues & Subscriptions	20,308.97	20,485.00	(176.03)	99.14%
Education & Conferences	30,215.39	24,475.00	5,740.39	123.45%
Equipment Lease	9,864.52	19,429.60	(9,565.08)	50.77%
General Insurance	16,401.93	15,198.48	1,203.45	107.92%
IT Services	3,600.00	3,600.00	0.00	100.00%
Legal & Accounting services			0.00	
Accounting	40,871.25	36,000.00	4,871.25	113.53%
Independent Audit	15,500.00	16,500.00	(1,000.00)	93.94%
Legal	36,793.25	40,500.00	(3,706.75)	90.85%
<b>Total Legal &amp; Accounting services</b>	<b>\$ 93,164.50</b>	<b>\$ 93,000.00</b>	<b>\$ 164.50</b>	<b>100.18%</b>
Medical Records Expense	32,809.01	31,114.20	1,694.81	105.45%
Meeting Expenses	2,106.00	849.96	1,256.04	247.78%
Office Expenses			0.00	
General Office Expenses	2,942.59	2,000.00	942.59	147.13%
Maintenance & Repairs	27,343.89	20,328.00	7,015.89	134.51%
Office Supplies	6,170.72	8,000.00	(1,829.28)	77.13%

Postage & Shipping	386.70	960.00	(573.30)	40.28%
Software & Website	15,953.57	17,248.00	(1,294.43)	92.50%
<b>Total Office Expenses</b>	<b>\$ 52,797.47</b>	<b>\$ 48,536.00</b>	<b>\$ 4,261.47</b>	<b>108.78%</b>
Payroll Expenses			0.00	
Board Stipends	22,601.25	41,400.00	(18,798.75)	54.59%
Employee Benefits	42,016.19	84,623.40	(42,607.21)	49.65%
Payroll Processing Fees	1,664.93	3,983.76	(2,318.83)	41.79%
Payroll Taxes	37,427.15	35,411.40	2,015.75	105.69%
Salaries	445,147.92	442,641.96	2,505.96	100.57%
Simple IRA Match	11,436.65	13,279.20	(1,842.55)	86.12%
Workers Compensation	2,774.02	1,104.00	1,670.02	251.27%
<b>Total Payroll Expenses</b>	<b>\$ 563,068.11</b>	<b>\$ 622,443.72</b>	<b>\$ (59,375.61)</b>	<b>90.46%</b>
Property Management Fees	3,262.50	600.00	2,662.50	543.75%
Utilities			0.00	
Cell Phones	2,400.00	1,500.00	900.00	160.00%
General Utilities	14,524.30	13,548.00	976.30	107.21%
Internet/Phone (deleted)		6,120.00	(6,120.00)	0.00%
<b>Total Utilities</b>	<b>\$ 16,924.30</b>	<b>\$ 21,168.00</b>	<b>\$ (4,243.70)</b>	<b>79.95%</b>
<b>Total Expenses</b>	<b>\$ 1,536,774.89</b>	<b>\$ 1,650,365.68</b>	<b>\$ (113,590.79)</b>	<b>93.12%</b>
<b>Net Operating Income</b>	<b>\$ 960,871.29</b>	<b>\$ 662,949.03</b>	<b>\$ 297,922.26</b>	<b>144.94%</b>
Other Income				
Interest/Dividend Income	318,326.04	73,920.41	244,405.63	430.63%
<b>Total Other Income</b>	<b>\$ 318,326.04</b>	<b>\$ 73,920.41</b>	<b>\$ 244,405.63</b>	<b>430.63%</b>
<b>Net Other Income</b>	<b>\$ 318,326.04</b>	<b>\$ 73,920.41</b>	<b>\$ 244,405.63</b>	<b>430.63%</b>
<b>Net Income</b>	<b>\$ 1,279,197.33</b>	<b>\$ 736,869.44</b>	<b>\$ 542,327.89</b>	<b>173.60%</b>

Wednesday, Jul 24, 2024 02:26:07 PM GMT-7 - Accrual Basis



**Fallbrook Regional Health District**  
**Report #3 - Budget vs. Actuals: FY 23-24 - Wellness Center**  
 July 2023 - June 2024

	Wellness Center			
	Actual	Budget	over Budget	% of Budget
<b>Income</b>				
Program Fees	500.00	7,500.00	(7,000.00)	6.67%
Wellness Center Income - Event/Space Rental	1,200.00	1,500.00	(300.00)	80.00%
<b>Total Income</b>	<b>\$ 1,700.00</b>	<b>\$ 9,000.00</b>	<b>\$ (7,300.00)</b>	<b>18.89%</b>
<b>Gross Profit</b>	<b>\$ 1,700.00</b>	<b>\$ 9,000.00</b>	<b>\$ (7,300.00)</b>	<b>18.89%</b>
<b>Expenses</b>				
Advertising & Promotions	12,774.22	19,680.00	(6,905.78)	64.91%
District Direct Care Services			0.00	
District Sponsored Events	3,507.58	11,000.00	(7,492.42)	31.89%
Health Services & Clinics	60,935.92	167,080.00	(106,144.08)	36.47%
<b>Total District Direct Care Services</b>	<b>\$ 64,443.50</b>	<b>\$ 178,080.00</b>	<b>\$ (113,636.50)</b>	<b>36.19%</b>
Dues & Subscriptions	1,127.00	1,382.00	(255.00)	81.55%
Education & Conferences	2,569.61	11,750.00	(9,180.39)	21.87%
Equipment Lease	9,555.24	11,316.60	(1,761.36)	84.44%
General Insurance	16,401.89	15,198.48	1,203.41	107.92%
IT Services	4,000.00	3,600.00	400.00	111.11%
Legal & Accounting services			0.00	
Legal	4,616.75	13,500.00	(8,883.25)	34.20%
<b>Total Legal &amp; Accounting services</b>	<b>\$ 4,616.75</b>	<b>\$ 13,500.00</b>	<b>\$ (8,883.25)</b>	<b>34.20%</b>
Meeting Expenses	637.04	300.00	337.04	212.35%
Office Expenses			0.00	
General Office Expenses	2,304.72	2,000.00	304.72	115.24%
Maintenance & Repairs	53,566.65	45,420.00	8,146.65	117.94%
Office Supplies	10,594.71	16,000.00	(5,405.29)	66.22%
<b>Total Office Expenses</b>	<b>\$ 66,466.08</b>	<b>\$ 63,420.00</b>	<b>\$ 3,046.08</b>	<b>104.80%</b>
Payroll Expenses			0.00	
Employee Benefits	55,036.92	67,698.72	(12,661.80)	81.30%
Payroll Processing Fees	1,664.94	2,225.52	(560.58)	74.81%
Payroll Taxes	19,250.71	19,782.60	(531.89)	97.31%
Salaries	259,804.28	247,281.96	12,522.32	105.06%
Simple IRA Match	6,128.13	7,418.40	(1,290.27)	82.61%
Workers Compensation	1,865.52	840.00	1,025.52	222.09%
<b>Total Payroll Expenses</b>	<b>\$ 343,750.50</b>	<b>\$ 345,247.20</b>	<b>\$ (1,496.70)</b>	<b>99.57%</b>
Property Management Fees		600.00	(600.00)	0.00%
Utilities			0.00	
Cell Phones	1,800.00	1,200.00	600.00	150.00%
General Utilities	18,696.64	17,820.00	876.64	104.92%
Internet/Phone (deleted)		6,480.00	(6,480.00)	0.00%

<b>Total Utilities</b>	\$	20,496.64	\$	25,500.00	\$	(5,003.36)	80.38%
<b>Total Expenses</b>	\$	546,838.47	\$	689,574.28	\$	(142,735.81)	79.30%
<b>Net Operating Income</b>	\$	(545,138.47)	\$	(680,574.28)	\$	135,435.81	80.10%
<b>Net Income</b>	\$	(545,138.47)	\$	(680,574.28)	\$	135,435.81	80.10%

Wednesday, Jul 24, 2024 02:27:02 PM GMT-7 - Accrual Basis

# California State Treasurer *Fiona Ma, CPA*



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

July 09, 2024

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

FALLBROOK REGIONAL HEALTH DISTRICT

DISTRICT ADMINISTRATOR  
138 SOUTH BRANDON ROAD  
FALLBROOK, CA 92028

[Tran Type Definitions](#)



Account Number: XXXXXXXXXX

June 2024 Statement

Effective Date	Transaction Date	Tran Type	Confirm Number	Web Confirm Number	Authorized Caller	Amount
6/12/2024	6/11/2024	RW	1754021	N/A	BARBARA MROZ	-149,000.00

**Account Summary**

Total Deposit:	0.00	Beginning Balance:	1,486,311.28
Total Withdrawal:	-149,000.00	Ending Balance:	1,337,311.28



CaITRUST  
 PO Box 2709  
 Granite Bay, CA 95746  
 www.caltrust.org  
 Email: admin@caltrust.org  
 Fax: 402-963-9094  
 Phone: 833-CALTRUST (225-8787)

# Investment Account Summary

06/01/2024 through 06/30/2024

## SUMMARY OF INVESTMENTS

Fund	Account Number	Total Shares Owned	Net Asset Value per Share on Jun 30 (\$)	Value on Jun 30 (\$)	Average Cost Amount (\$)	Cumulative Change in Value (\$)
<b>FALLBROOK REGIONAL HEALTH DISTRICT</b>						
CalTRUST Medium Term Fund	[REDACTED]	500,672.866	9.74	4,876,553.71	5,013,262.83	(136,709.12)
CalTRUST Liquidity Fund	[REDACTED]	1,033,684.980	1.00	1,033,684.98	1,033,684.98	0.00
<b>Portfolios Total value as of 06/30/2024</b>				<b>5,910,238.69</b>		

## DETAIL OF TRANSACTION ACTIVITY

Activity Description	Activity Date	Amount (\$)	Amount in Shares	Balance in Shares	Price per Share (\$)	Balance (\$)	Average Cost Amt (\$)	Realized Gain/(Loss) (\$)
<b>CalTRUST Medium Term Fund</b>		<b>FALLBROOK REGIONAL HEALTH DISTRICT</b>			<b>Account Number: [REDACTED]</b>			
Beginning Balance	06/01/2024			499,042.830	9.71	4,845,705.88		
Accrual Income Div Reinvestment	06/28/2024	15,876.55	1,630.036	500,672.866	9.74	4,876,553.71	0.00	0.00
Change in Value						14,971.28		
<b>Closing Balance as of</b>	<b>Jun 30</b>			<b>500,672.866</b>	<b>9.74</b>	<b>4,876,553.71</b>		
<b>CalTRUST Liquidity Fund</b>		<b>FALLBROOK REGIONAL HEALTH DISTRICT</b>			<b>Account Number: [REDACTED]</b>			
Beginning Balance	06/01/2024			1,029,114.230	1.00	1,029,114.23		
Accrual Income Div Reinvestment	06/28/2024	4,570.75	4,570.750	1,033,684.980	1.00	1,033,684.98	0.00	0.00
Change in Value						0.00		
<b>Closing Balance as of</b>	<b>Jun 30</b>			<b>1,033,684.980</b>	<b>1.00</b>	<b>1,033,684.98</b>		

Please note that this information should not be construed as tax advice and it is recommended that you consult with a tax professional regarding your account.



# Summary Statement

June 30, 2024

Page 1 of 3

Investor ID: [REDACTED]

0000078-0000324 PDF T 665067

**Fallbrook Regional Health District**  
**138 South Brandon Road**  
**Fallbrook, CA 92028**

## California CLASS

### California CLASS

Average Monthly Yield: 5.4006%

		Beginning Balance	Contributions	Withdrawals	Income Earned	Income Earned YTD	Average Daily Balance	Month End Balance
[REDACTED]	FRHD_CLASS_Prime	1,047,506.78	0.00	0.00	4,635.53	27,946.14	1,047,970.33	1,052,142.31
<b>TOTAL</b>		<b>1,047,506.78</b>	<b>0.00</b>	<b>0.00</b>	<b>4,635.53</b>	<b>27,946.14</b>	<b>1,047,970.33</b>	<b>1,052,142.31</b>



Account Statement

June 30, 2024

Page 2 of 3

Account Number: [REDACTED]

FRHD\_CLASS\_Prime

Account Summary

Average Monthly Yield: 5.4006%

	Beginning Balance	Contributions	Withdrawals	Income Earned	Income Earned YTD	Average Daily Balance	Month End Balance
California CLASS	1,047,506.78	0.00	0.00	4,635.53	27,946.14	1,047,970.33	1,052,142.31

Transaction Activity

Transaction Date	Transaction Description	Contributions	Withdrawals	Balance	Transaction Number
06/01/2024	Beginning Balance			1,047,506.78	
06/30/2024	Income Dividend Reinvestment	4,635.53			
06/30/2024	Ending Balance			1,052,142.31	



California CLASS

California CLASS

Date	Dividend Rate	Daily Yield
06/01/2024	0.000000000	5.4134%
06/02/2024	0.000000000	5.4134%
06/03/2024	0.000147531	5.4015%
06/04/2024	0.000147819	5.4102%
06/05/2024	0.000147539	5.3999%
06/06/2024	0.000146752	5.3711%
06/07/2024	0.000442356	5.3967%
06/08/2024	0.000000000	5.3967%
06/09/2024	0.000000000	5.3967%
06/10/2024	0.000147190	5.3872%
06/11/2024	0.000147127	5.3849%
06/12/2024	0.000147566	5.4009%
06/13/2024	0.000147390	5.3945%
06/14/2024	0.000442596	5.3997%
06/15/2024	0.000000000	5.3997%
06/16/2024	0.000000000	5.3997%
06/17/2024	0.000147621	5.4029%
06/18/2024	0.000295734	5.4119%
06/19/2024	0.000000000	5.4119%
06/20/2024	0.000147778	5.4087%
06/21/2024	0.000442560	5.3992%
06/22/2024	0.000000000	5.3992%
06/23/2024	0.000000000	5.3992%
06/24/2024	0.000147428	5.3959%
06/25/2024	0.000147407	5.3951%
06/26/2024	0.000147691	5.4055%
06/27/2024	0.000147214	5.3880%
06/28/2024	0.000443535	5.4111%
06/29/2024	0.000000000	5.4111%
06/30/2024	0.000000000	5.4111%

Performance results are shown net of all fees and expenses and reflect the reinvestment of dividends and other earnings. Many factors affect performance including changes in market conditions and interest rates and in response to other economic, political, or financial developments. Investment involves risk including the possible loss of principal. No assurance can be given that the performance objectives of a given strategy will be achieved. **Past performance is no guarantee of future results. Any financial and/or investment decision may incur losses.**

### **LOCAL AGENCY INVESTMENT FUND (LAIF)**

Through the Pooled Money Investment Account (PMIA), the State Treasurer invests taxpayers' money to manage the State's cash flow and strengthen the financial security of local governmental entities. PMIA policy sets as primary investment objectives safety, liquidity and yield.

As of June 30, 2024, the District's balance was \$1,337,311.28. This represents 16.11% of the District's investment portfolio. The Average Monthly Effective Yield for the month of June, 2024 was 4.48%. In June, 2024, the District reported \$0.00 in quarterly earnings.

### **CalTRUST**

The CalTRUST Board works closely with the investment manager, State Street Global Advisors, to ensure that public dollars are managed securely and efficiently and are in full compliance with California Law. The primary objective is to safeguard the preservation of principal.

The District is invested in two CalTRUST Funds: Medium Term Fund and Liquidity Fund. As of June, 2024, the District's closing Net Asset Value was \$5,910,238.69. This represents 71.21% of the District's investment portfolio.

In June, 2024, the District earned \$20,447.30 in dividend income and reported \$14,971.28 in unrealized gains. The One Year Yield on the Medium-Term Fund was 3.96% and the One Year Yield on the Liquidity Fund was 5.58%.

### **California CLASS**

The California Cooperative Liquid Assets Securities System (California CLASS) is a pooled investment option that invests in high-quality, short-to-medium-term securities that prioritizes principal preservation. The California CLASS management has appointed Public Trust Advisors, LLC to serve as the Investment Advisor and Administrator. As of June, 2024, the District's balance was \$1,052,142.31. This represents 12.68% of the District's investment portfolio. In June, 2024, the District reported \$4,635.53 in earnings. The 30-day average yield was 5.4006%.

The investments of the District are in compliance with the District's 2023-2024 Investment Policy. The balances in the District's investment accounts give the District the ability to meet its expenditure requirements for the next eighteen (18) months.



# Fallbrook Regional Health District

## Report #7 - Check Detail

June 2024

DATE	TRANSACTION TYPE	NUM	AMOUNT	SPLIT
24 Hour Elevator Inc.				
06/11/2024	Bill Payment (Check)	14264	(249.17)	Pacific Western Bank - Checking
06/01/2024	Bill	168169	249.17	Office Expenses:Maintenance & Repairs
Actuarial Retirement Consulting				
06/25/2024	Bill Payment (Check)	14291	(2,000.00)	Pacific Western Bank - Checking
06/21/2024	Bill	1815	2,000.00	-Split-
Amazon Capital Services				
06/04/2024	Bill Payment (Check)	14239	(76.16)	Pacific Western Bank - Checking
05/30/2024	Bill	1HD7-JD1H-P91N	76.16	Office Expenses:Office Supplies
06/11/2024	Bill Payment (Check)	14266	(43.09)	Pacific Western Bank - Checking
06/07/2024	Bill	1R37-1LC4-LDXM	43.09	Office Expenses:Office Supplies
06/18/2024	Bill Payment (Check)	14283	(52.11)	Pacific Western Bank - Checking
06/12/2024	Bill	11DP-RN6X-KJQJ	6.99	Office Expenses:Office Supplies
06/17/2024	Bill	1DGW-7VLW-F137	45.12	Office Expenses:Office Supplies
06/25/2024	Bill Payment (Check)	14292	(245.16)	Pacific Western Bank - Checking
06/20/2024	Bill	1XXY-6VNT-3WFJ	46.31	Office Expenses:Office Supplies
06/20/2024	Bill	11WJ-CRGC-3T6G	198.85	Office Expenses:Office Supplies
Brand Assassins				
06/18/2024	Bill Payment (Check)	14284	(199.00)	Pacific Western Bank - Checking
05/10/2024	Bill	22926	199.00	Advertising & Promotions
CalPERS				
06/25/2024	Bill Payment (Check)	14293	(8,694.77)	Pacific Western Bank - Checking
06/14/2024	Bill	Bus Unit 1800	8,694.77	-Split-
Culligan of Escondido				
06/11/2024	Bill Payment (Check)	14268	(63.28)	Pacific Western Bank - Checking
05/31/2024	Bill	1094402	63.28	Office Expenses:General Office Expenses
Culligan of San Diego				
06/11/2024	Bill Payment (Check)	14269	(75.70)	Pacific Western Bank - Checking
05/31/2024	Bill	1420730	75.70	Office Expenses:General Office Expenses
Darren Key				
06/04/2024	Bill Payment (Check)	14240	(307.00)	Pacific Western Bank - Checking
05/23/2024	Bill	05232024	152.00	Office Expenses:Maintenance & Repairs
05/17/2024	Bill	05172024	80.00	Office Expenses:Maintenance & Repairs
05/13/2024	Bill	05132024	75.00	Office Expenses:Maintenance & Repairs
06/11/2024	Bill Payment (Check)	14270	(75.00)	Pacific Western Bank - Checking
06/03/2024	Bill	06032024	75.00	Office Expenses:Maintenance & Repairs

Department of Industrial Relations

# Fallbrook Regional Health District

## Report #7 - Check Detail

June 2024

DATE	TRANSACTION TYPE	NUM	AMOUNT	SPLIT
06/25/2024	Bill Payment (Check)	14294	(225.00)	Pacific Western Bank - Checking
06/19/2024	Bill	E2073678 SD	225.00	Office Expenses:Maintenance & Repairs
Fallbrook Chamber of Commerce				
06/04/2024	Bill Payment (Check)	14241	(25.00)	Pacific Western Bank - Checking
05/31/2024	Bill	2024-17	25.00	Advertising & Promotions
Fallbrook Rooter & Drain Service				
06/25/2024	Bill Payment (Check)	14295	(199.00)	Pacific Western Bank - Checking
06/19/2024	Bill	24041	199.00	Office Expenses:Maintenance & Repairs
Fallbrook Waste & Recycling - E. Mission				
06/04/2024	Bill Payment (Check)	14242	(295.03)	Pacific Western Bank - Checking
05/31/2024	Bill	05312024	295.03	Utilities:General Utilities
Fallbrook Waste & Recycling - S. Brandon				
06/04/2024	Bill Payment (Check)	14243	(96.50)	Pacific Western Bank - Checking
06/01/2024	Bill	06012024	96.50	Utilities:General Utilities
Fish Window Cleaning				
06/04/2024	Bill Payment (Check)	14244	(675.00)	Pacific Western Bank - Checking
06/03/2024	Bill	2887-23410	675.00	Office Expenses:Maintenance & Repairs
Five Star Bank - CC				
06/11/2024	Bill Payment (Check)	14271	(9,549.92)	Pacific Western Bank - Checking
05/31/2024	Bill	Acct XXXX 0944	9,549.92	S. Brandon Road:S. Brandon Road - Improvements
Fowler Pest Control, Inc.				
06/18/2024	Bill Payment (Check)	14285	(158.00)	Pacific Western Bank - Checking
06/12/2024	Bill	264284	158.00	Office Expenses:Maintenance & Repairs
FPUD - 7720-001				
06/04/2024	Bill Payment (Check)	14245	(287.52)	Pacific Western Bank - Checking
05/23/2024	Bill	007720-001	287.52	Utilities:General Utilities
FPUD - 7720-002 - E. Mission Rd.				
06/04/2024	Bill Payment (Check)	14246	(52.09)	Pacific Western Bank - Checking
05/23/2024	Bill	007720-002	52.09	Utilities:General Utilities
FPUD - 7720-003 - E. Mission Rd.				
06/04/2024	Bill Payment (Check)	14247	(296.30)	Pacific Western Bank - Checking
05/23/2024	Bill	007720-003	296.30	Utilities:General Utilities

Impact Marketing & Design, Inc.

# Fallbrook Regional Health District

## Report #7 - Check Detail

June 2024

DATE	TRANSACTION TYPE	NUM	AMOUNT	SPLIT
06/18/2024	Bill Payment (Check)	14286	(2,262.75)	Pacific Western Bank - Checking
06/01/2024	Bill	IN24-01980	2,262.75	Advertising & Promotions
Iron Mountain				
06/04/2024	Bill Payment (Check)	14248	(2,847.63)	Pacific Western Bank - Checking
05/31/2024	Bill	JLZB596	2,847.63	Medical Records Expense
Jan-Pro Commercial Cleaning				
06/04/2024	Bill Payment (Check)	14249	(920.00)	Pacific Western Bank - Checking
06/01/2024	Bill	116439	920.00	Office Expenses:Maintenance & Repairs
Jasmine Thomas				
06/04/2024	Bill Payment (Check)	14250	(10.18)	Pacific Western Bank - Checking
05/31/2024	Bill	05312024 - Reimburse	10.18	Auto Expenses
06/18/2024	Bill Payment (Check)	14287	(163.00)	Pacific Western Bank - Checking
06/17/2024	Bill	06172024	163.00	Education & Conferences
Jeffrey G. Scott, Esquire				
06/25/2024	Bill Payment (Check)	14296	(13,037.50)	Pacific Western Bank - Checking
06/20/2024	Bill	06202024	13,037.50	-Split-
Juana Diaz				
06/04/2024	Bill Payment (Check)	14251	(180.00)	Pacific Western Bank - Checking
05/29/2024	Bill	379469	180.00	Office Expenses:Maintenance & Repairs
06/11/2024	Bill Payment (Check)	14272	(180.00)	Pacific Western Bank - Checking
06/05/2024	Bill	379470	180.00	Office Expenses:Maintenance & Repairs
06/18/2024	Bill Payment (Check)	14288	(180.00)	Pacific Western Bank - Checking
06/12/2024	Bill	379471	180.00	Office Expenses:Maintenance & Repairs
06/25/2024	Bill Payment (Check)	14297	(180.00)	Pacific Western Bank - Checking
06/19/2024	Bill	379472	180.00	Office Expenses:Maintenance & Repairs
Knight Security & Fire Systems				
06/04/2024	Bill Payment (Check)	14252	(44.00)	Pacific Western Bank - Checking
06/01/2024	Bill	192877	44.00	Office Expenses:Maintenance & Repairs
Konica Minolta				
06/11/2024	Bill Payment (Check)	14273	(1,592.55)	Pacific Western Bank - Checking
06/05/2024	Bill	44925690	1,592.55	-Split-
LDC Always Green Landscape				
06/11/2024	Bill Payment (Check)	14274	(1,620.00)	Pacific Western Bank - Checking
05/31/2024	Bill	1385	360.00	Office Expenses:Maintenance & Repairs
05/31/2024	Bill	13884	1,260.00	Office Expenses:Maintenance & Repairs

Leslie Salmon

# Fallbrook Regional Health District

## Report #7 - Check Detail

June 2024

DATE	TRANSACTION TYPE	NUM	AMOUNT	SPLIT
06/04/2024	Bill Payment (Check)	14253	(1,687.50)	Pacific Western Bank - Checking
05/31/2024	Bill	May 2024	1,012.50	District Direct Care Services:Health Services & Clinics
05/01/2024	Bill	April 2024	675.00	District Direct Care Services:Health Services & Clinics
Palomar Family Counseling Service Inc.				
06/11/2024	Bill Payment (Check)	14275	(3,510.00)	Pacific Western Bank - Checking
05/31/2024	Bill	12986	3,510.00	District Direct Care Services:Health Services & Clinics
Raquel Williams				
06/18/2024	Bill Payment (Check)	14289	(89.97)	Pacific Western Bank - Checking
06/13/2024	Bill	2024.06.13	89.97	Office Expenses:General Office Expenses
Rotary Club of Fallbrook				
06/04/2024	Bill Payment (Check)	14254	(182.00)	Pacific Western Bank - Checking
05/30/2024	Bill	105	182.00	Dues & Subscriptions
Rotary Club of Fallbrook Village				
06/11/2024	Bill Payment (Check)	14276	(35.00)	Pacific Western Bank - Checking
06/03/2024	Bill	2950	35.00	Dues & Subscriptions
Safe and Sound Security				
06/04/2024	Bill Payment (Check)	14255	(75.87)	Pacific Western Bank - Checking
06/08/2024	Bill	27069	75.87	Office Expenses:Maintenance & Repairs
SDG&E - 5971 - E. Mission				
06/04/2024	Bill Payment (Check)	14256	(670.23)	Pacific Western Bank - Checking
05/28/2024	Bill	05282024	670.23	Utilities:General Utilities
SDG&E - 6994 - Brandon				
06/04/2024	Bill Payment (Check)	14257	(559.68)	Pacific Western Bank - Checking
05/28/2024	Bill	05282024	559.68	Utilities:General Utilities
Spectrum - Mission				
06/04/2024	Bill Payment (Check)	14258	(514.93)	Pacific Western Bank - Checking
05/22/2024	Bill	0060354052224	514.93	Utilities:Internet/Telephone
Springston Design LLC				
06/04/2024	Bill Payment (Check)	14259	(600.00)	Pacific Western Bank - Checking
06/02/2024	Bill	INV - 0093	600.00	-Split-
Sun Realty				
06/25/2024	Bill Payment (Check)	14298	(562.50)	Pacific Western Bank - Checking
06/20/2024	Bill	06202024	562.50	Property Management Fees

# Fallbrook Regional Health District

## Report #7 - Check Detail

June 2024

DATE	TRANSACTION TYPE	NUM	AMOUNT	SPLIT
Susan Woodward				
06/11/2024	Bill Payment (Check)	14277	(1,500.00)	Pacific Western Bank - Checking
05/31/2024	Bill	05312024	1,500.00	Legal & Accounting services:Accounting
T-Mobile				
06/04/2024	Bill Payment (Check)	14260	(79.88)	Pacific Western Bank - Checking
05/31/2024	Bill	Acct 989429125	79.88	-Split-
Tracy Rosalee				
06/04/2024	Bill Payment (Check)	14262	(38.19)	Pacific Western Bank - Checking
05/31/2024	Bill	05312024 Reimburse	38.19	Auto Expenses
UMPQUA Bank				
06/11/2024	Bill Payment (Check)	14279	(4,064.96)	Pacific Western Bank - Checking
06/03/2024	Bill	Acct #####-7117	4,064.96	-Split-
Village News				
06/04/2024	Bill Payment (Check)	14263	(716.00)	Pacific Western Bank - Checking
05/31/2024	Bill	29291	716.00	-Split-

**Account Summary**




Billing Cycle		06/30/2024
Days In Billing Cycle		30
Previous Balance		\$4,064.96
Purchases	+	\$5,394.27
Cash	+	\$0.00
Balance Transfers	+	\$0.00
Special	+	\$0.00
Credits	-	\$0.00
Payments	-	\$6,296.73-
Other Charges	+	\$0.00
Finance Charges	+	\$0.00

**NEW BALANCE** **\$3,162.50**

**Credit Summary**

Total Credit Line	\$12,000.00
Available Credit Line	\$8,837.50
Available Cash	\$0.00
Amount Over Credit Line	\$0.00
Amount Past Due	\$0.00
Disputed Amount	\$0.00

**Account Inquiries**

-  Call us at: (866) 777-9013  
Lost or Stolen Card: (866) 839-3485
-  Go to [www.umpquabank.com](http://www.umpquabank.com)
-  Write us at PO BOX 35142 - LB1181, SEATTLE, WA 98124-5142

**Payment Summary**

<b>NEW BALANCE</b>	<b>\$3,162.50</b>
<b>MINIMUM PAYMENT</b>	<b>\$3,162.50</b>
<b>PAYMENT DUE DATE</b>	<b>07/25/2024</b>

*NOTE: Grace period to avoid a finance charge on purchases, pay entire new balance by payment due date. Finance charge accrues on cash advances until paid and will be billed on your next statement.*

**Corporate Activity**

				<b>TOTAL CORPORATE ACTIVITY</b>	<b>\$4,064.96-</b>
Trans Date	Post Date	Reference Number	Transaction Description	Amount	
06/17	06/17	0000000LBX2406173936002	PAYMENT - THANK YOU	\$4,064.96-	

PLEASE DETACH COUPON AND RETURN PAYMENT USING THE ENCLOSED ENVELOPE - ALLOW UP TO 7 DAYS FOR RECEIPT

UMPQUA BANK  
 PO BOX 35142 - LB1181  
 SEATTLE WA 98124-5142

**Account Number**

#### #### #### 7117

Check box to indicate name/address change on back of this coupon

AMOUNT OF PAYMENT ENCLOSED

Closing Date	New Balance	Total Minimum Payment Due	Payment Due Date
06/30/24	\$3,162.50	\$3,162.50	07/25/24

\$



BL ACCT 00002840-20000001  
 FALLBROOK REG HEALTH DIST  
 138 SOUTH BRANDON ROAD  
 FALLBROOK CA 92028

MAKE CHECK PAYABLE TO:

UMPQUA BANK COMMERCIAL CARD OPS  
 PO BOX 35142 - LB1181  
 SEATTLE WA 98124-5142

Cardholder Account Summary						
RACHEL MASON ##### 2600			Payments & Other Credits \$0.00	Purchases & Other Charges \$4,181.14	Cash Advances \$0.00	Total Activity \$4,181.14
Cardholder Account Detail						
Trans Date	Post Date	Plan Name	Reference Number	Description	Amount	
06/03	06/04	PPLN01	2449216415500022915930	ACHD* CA WWW.ACHD.ORG CA	\$1,650.00	
06/03	06/05	PPLN01	24692164156100689884556	SOUTHWES 5262521954184 800-435-9792 TX RUNNELLS/RACHEL MASO 092324 SAN SMF WN Z SAN WN G	\$234.97	
06/04	06/05	PPLN01	24436544157041452616721	SOCIETYFORHUMANRESOURCE 800-2837476 VA	\$264.00	
06/07	06/09	PPLN01	24692164159102791017916	AMZN Mktp US*7K5I938U3 Amzn.com/bill WA	\$81.81	
06/07	06/09	PPLN01	24692164159102796222933	AMZN Mktp US*W89SO75B3 Amzn.com/bill WA	\$35.52	
06/08	06/10	PPLN01	24137464161501181173945	STATERBROS138 TEMECULA CA	\$34.88	
06/11	06/12	PPLN01	24692164163106599563306	SQ *HANDEL'S HOMEMADE ICE Oceanside CA	\$25.20	
06/12	06/13	PPLN01	24427334164740279241039	GROCERY OUTLET OF F FALLBROOK CA	\$102.49	
06/11	06/13	PPLN01	24071054164627140651624	CALIFORNIA SPECIAL DIS 916-4427887 CA	\$65.00	
06/15	06/16	PPLN01	24692164167100161838564	LOWES #00775* TEMECULA CA	\$107.79	
06/26	06/28	PPLN01	24755424179261791255179	HILTON HOTELS CHICAGO 312-9224400 IL	\$1,579.48	

Cardholder Account Summary						
THERESA GERACITANO ##### 9073			Payments & Other Credits \$0.00	Purchases & Other Charges \$54.07	Cash Advances \$0.00	Total Activity \$54.07
Cardholder Account Detail						
Trans Date	Post Date	Plan Name	Reference Number	Description	Amount	
05/31	06/02	PPLN01	24692164152106706961701	AMZN Mktp US*0S83I3D33 Amzn.com/bill WA	\$36.07	
06/17	06/18	PPLN01	24492164169000028943385	EVENT LISTING FEE HTTPSWWW.EVEN CA	\$9.00	
06/26	06/27	PPLN01	24492164178000033482055	EVENT LISTING FEE HTTPSWWW.EVEN CA	\$9.00	

Cardholder Account Summary						
JUDITH OSWALD ##### 7000			Payments & Other Credits \$2,231.77-	Purchases & Other Charges \$1,159.06	Cash Advances \$0.00	Total Activity \$1,072.71-
Cardholder Account Detail						
Trans Date	Post Date	Plan Name	Reference Number	Description	Amount	
06/03	06/04	PPLN01	24492154155717600344602	ADOBE *ADOBE 408-536-6000 CA	\$149.93	
06/08	06/09	PPLN01	24692164160103542987131	WWW COSTCO COM 800-955-2292 WA	\$113.38	
06/07	06/09	PPLN01	24316054160548213730229	SHELL OIL10006292014 FALLBROOK CA	\$71.75	
06/12	06/14	PPLN01	24055234165878761700599	INTERNATIONAL PUBLIC MAN 800-950-1292 VA	\$100.00	
06/16	06/16	PPLN01	24000774168000006527608	CSEBOOK PBC CASEBOOK.NET NY	\$708.00	
06/17	06/17	PPLN01	000000LBX2406173936003	PAYMENT - THANK YOU	\$2,231.77-	
06/20	06/21	PPLN01	24011344172000063142823	BONSALL CHAMBER OF COM HTTPSBONSALL CA	\$16.00	

Finance Charge Summary / Plan Level Information									
Plan Name	Plan Description	FCM <sup>1</sup>	Average Daily Balance	Periodic Rate *	Corresponding APR	Finance Charges	Effective APR Fees **	Effective APR	Ending Balance
<b>Purchases</b>									
PPLN01 001	PURCHASE	E	\$0.00	0.06008%(D)	21.9900%	\$0.00	\$0.00	0.0000%	\$3,162.50
<b>Cash</b>									
CPLN01 001	CASH	A	\$0.00	0.06554%(D)	23.9900%	\$0.00	\$0.00	0.0000%	\$0.00
* Periodic Rate (M)=Monthly (D)=Daily							Days In Billing Cycle: 30		
** includes cash advance and foreign currency fees							APR = Annual Percentage Rate		
<sup>1</sup> FCM = Finance Charge Method									
(V) = Variable Rate If you have a variable rate account the periodic rate and Annual Percentage Rate (APR) may vary.									








**Account Summary**

Credit Limit		\$4,500.00
Billing Cycle		06/30/2024
Days In Billing Cycle		30
Purchases and Other Charges	+	\$1,159.06
Cash	+	\$0.00
Balance Transfer	+	\$0.00
Credits	-	\$0.00
Payments	-	\$2,231.77-
<b>TOTAL ACTIVITY</b>		<b>\$1,072.71 -</b>

**Account Inquiries**

-  Call us at: (866) 777-9013  
Lost or Stolen Card: (866) 839-3485
-  Go to [www.umpquabank.com](http://www.umpquabank.com)
-  Write us at PO BOX 35142 - LB1181, SEATTLE, WA 98124-5142

**Cardholder Account Summary**

Trans Date	Post Date	Reference Number	Description	Amount
06/03	06/04	24492154155717600344602	ADOBE *ADOBE 408-536-6000 CA	149.93
06/08	06/09	24692164160103542987131	WWW COSTCO COM 800-955-2292 WA	113.38
06/07	06/09	24316054160548213730229	SHELL OIL10006292014 FALLBROOK CA	71.75
06/12	06/14	24055234165878761700599	INTERNATIONAL PUBLIC MAN 800-950-1292 VA	100.00
06/16	06/16	24000774168000006527608	CSEBOOK PBC CASEBOOK.NET NY	708.00
06/17	06/17	0000000LBX2406173936003	PAYMENT - THANK YOU	2,231.77 -
06/20	06/21	24011344172000063142823	BONSALL CHAMBER OF COM HTTPSBONSALL CA	16.00

PLEASE DETACH COUPON AND RETURN PAYMENT USING THE ENCLOSED ENVELOPE - ALLOW UP TO 7 DAYS FOR RECEIPT

UMPQUA BANK  
 PO BOX 35142 - LB1181  
 SEATTLE WA 98124-5142



**Account Number**

#### #### #### 7000

Check box to indicate  
 name/address change   
 on back of this coupon

AMOUNT OF PAYMENT ENCLOSED

**Closing Date**

06/30/24

**Total Activity**

\$0.00

\*\*Memo Statement \*\* No Payment Required

\$



JUDITH OSWALD  
 FALLBROOK REG HEALTH DIST  
 138 SOUTH BRANDON ROAD  
 FALLBROOK CA 92028-2205

MAKE CHECK PAYABLE TO:

UMPQUA BANK COMMERCIAL CARD OPS  
 PO BOX 35142 - LB1181  
 SEATTLE WA 98124-5142



ACCOUNTS PAYABLE

Account Number: XXXX XXXX XXXX 0944

ACCOUNT SUMMARY table with fields: Credit Limit (\$15,000.00), Credit Available (\$14,367.00), Statement Closing Date (June 30, 2024), Days in Billing Cycle (30), Previous Balance (\$9,549.92), - Payments & Credits (\$9,549.92), + Purchases & Other Charges (\$632.84), + Cash Advances (\$0.00), + Finance Charges (\$0.00), = New Balance (\$632.84). Includes contact info for Cardmember Services.

PAYMENT INFORMATION table with fields: New Balance (\$632.84), Minimum Payment Due (\$632.84), Payment Due Date (July 25, 2024).

Notice: SEE REVERSE SIDE FOR MORE IMPORTANT INFORMATION

TRANSACTIONS

Table with columns: Tran Date, Post Date, Reference Number, Transaction Description, Amount. Includes summary rows for 06/18 and 06/23.

Please detach bottom portion and submit with payment using enclosed envelope



Payment Information

Table with fields: Account Number (XXXX XXXX XXXX 0944), Payment Due Date (July 25, 2024), New Balance (\$632.84), Minimum Payment Due (\$632.84), Past Due Amount (\$0.00).

Make Check Payable to:

Amount Enclosed: \$ [ ]

ACCOUNTS PAYABLE
FALLBROOK REGIONAL HD
138 S BRANDON RD
FALLBROOK CA 92028-2205



Cardmember Services
PO BOX 306005
Nashville TN 37230-6005



**INTEREST CHARGE CALCULATION**

Your **Annual Percentage Rate (APR)** is the annual interest rate on your account

Type of Balance	ANNUAL PERCENTAGE RATE (APR)	Expiration Date	Balance Subject to Interest Rate	Days in Billing Cycle	Interest Charge
Purchases	23.99% (v)	-	\$0.00	30	\$0.00
Cash Advances	21.00% (f)	-	\$0.00	30	\$0.00

(v) = variable (f) = fixed

**Fallbrook Regional Health District**  
**Report #9 - Community Development Disbursements**  
 July 2023 - June 2024

	Date	Num	Name	Memo/Description	Split	Amount	
Administration	04/24/2024	13842424	JW Mechanical		Office Expenses:Maintenance & Repairs	488.00	
<b>Total for Administration</b>						\$ 488.00	<b>488.00</b>
Wellness Center	07/14/2023	22448	Brand Assassins		Office Expenses:Maintenance & Repairs	2,478.00	
	08/06/2023	EST224	JK Drywall and Construction		E. Mission Road:E. Mission Road - Improvements	3,450.00	
	08/06/2023	EST223	JK Drywall and Construction		E. Mission Road:E. Mission Road - Improvements	5,800.00	
	08/06/2023	EST222	JK Drywall and Construction		E. Mission Road:E. Mission Road - Improvements	2,800.00	
	08/06/2023	EST221	JK Drywall and Construction		E. Mission Road:E. Mission Road - Improvements	6,200.00	
	08/08/2023	166962042	Uline		Office Expenses:Office Supplies	2,316.71	
	08/09/2023	MASON2	Langdon Floorcovering		E. Mission Road:E. Mission Road - Improvements	7,000.00	
	08/16/2023	23336	Fallbrook Rooter & Drain Service		Office Expenses:Maintenance & Repairs	612.44	
	08/23/2023	167560567	Uline		Office Expenses:Office Equipment & Fixtures	3,718.50	
							<b>34,375.65</b>
	09/06/2023	Prop# 16369623	JW Mechanical		E. Mission Road:E. Mission Road - Improvements	7,982.50	
	09/28/2023	169058645	Uline	Chairs - Utility Wagon	Office Expenses:Office Equipment & Fixtures	1,245.04	
							<b>9,227.54</b>
	10/17/2023	169780260	Uline	Community Development Disbursement	Office Expenses:Office Equipment & Fixtures	3,719.12	
	10/26/2023	1636102623	JW Mechanical	Community Development Disbursement	E. Mission Road:E. Mission Road - Improvements	4,732.50	
							<b>8,451.62</b>
	11/21/2023		JW Mechanical	CHWC - A-2 - CDD	E. Mission Road:E. Mission Road - Improvements	4,732.50	
							<b>4,732.50</b>
	12/06/2023	163612623	JW Mechanical		E. Mission Road:E. Mission Road - Improvements	10,000.00	
	12/18/2023	23785	Safe and Sound Security		E. Mission Road:E. Mission Road - Improvements	11,958.18	
	12/27/2023	6873	KARN Engineering & Surveying	Survey for new ramps at WC	Office Expenses:Maintenance & Repairs	2,290.00	
							<b>24,248.18</b>
	01/01/2024	163612623	JW Mechanical		E. Mission Road:E. Mission Road - Improvements	9,785.00	
	01/01/2024	04012023-11302023	Rob Holmes	CDD - Parking Lot consulting	Office Expenses:Maintenance & Repairs	687.50	
							<b>10,472.50</b>
	02/08/2024	23786	Safe and Sound Security		E. Mission Road:E. Mission Road - Improvements	3,590.58	
	02/19/2024	1050	Active Power Solutions	CDD - CHWC-Bldg A - room 1	E. Mission Road:E. Mission Road - Improvements	3,149.00	
	02/26/2024	6924	KARN Engineering & Surveying		E. Mission Road:E. Mission Road - Improvements	3,600.00	
	02/29/2024	PUBCAL 005320	SitelogIQ		E. Mission Road:E. Mission Road - Improvements	1,313,109.00	
							<b>1,323,448.58</b>
	04/16/2024	INV0215	JK Drywall and Construction		E. Mission Road:E. Mission Road - Improvements	4,650.00	
							<b>4,650.00</b>
	05/15/2024	698	Arch 5 Design		E. Mission Road:E. Mission Road - Improvements	2,600.00	
	05/15/2024	1706	Encinitas Design Group		E. Mission Road:E. Mission Road - Improvements	6,000.00	
<b>Total for Wellness Center</b>						\$ 1,428,206.57	<b>8,600.00</b>
							<b>1,428,206.57</b>
<b>Total for CDD</b>							<b>1,428,694.57</b>

## Wellness Center Administrator Report- August 2024

- Summer has arrived, and the attendance numbers at the Center are lower due to cancellation of classes as instructors and participants take off on vacation. The Affiliate yoga classes were canceled for the entire month of July.
- Our new Wellness Walk program offered in partnership with the Fallbrook Land Conservancy was a hit. Over 33 people registered for the ½ mile guided walk, it was one of the top 3 landing pages on our website and 20 people showed up for the walk.
- We have started our Wellness Challenge with Scripps. This app-based contest awards points for physical activity, nutrition, social support, and mental health activities. It is fun to see the community jump in, with the Fallbrook Chamber of Commerce and the High School District creating their teams.
- On Saturday, August 17th, we will offer Rescue Ready: Narcan, CPR, and Communication training. Attendees will receive a unit of Narcan as part of this training.
- Lifestyle Change program updates:
  - Recruitment for our third Lifestyle Change class is underway. A Skinny Genes coach will teach this class, as Bianca is working with her cohort that started in February.
  - We have 2 campaigns running with partners to promote the program:
    - Fallbrook Pharmacy is conducting a two-week campaign. Flyers about the program will be sent out with each prescription delivery.
    - Major Market is inserting flyers into grocery bags on Senior Discount days in August.
  - Our second cohort, which started in February, is at the halfway mark, and close to half of the participants have met their one-year goal to lose 5% to prevent diabetes.
- I am working with Vista Community Clinic to see how we can further support their grant-funded Promotoras program by providing space at the Center for training and classes.
- For the past few months, we have deepened our relations with the CSU San Marcos School of Nursing by providing space for classroom instruction at the Center.

<b>Wellness Center Events 2024</b>	<b>JAN</b>	<b>FEB</b>	<b>MAR</b>	<b>APR</b>	<b>MAY</b>	<b>JUNE</b>	<b>JULY</b>
Mental Health First Aid	9	22	0	22	0	8	0
CCHW	10	16	10	12	14	0	15
Wellness Wednesday- Health Screening, workshop, resources	10	17	29	34	30	35	24
Disease Specific Education (including Lifestyle Change)	28	108	364	397	97	132	202
Partner Health & Wellness activities	108	203	178	206	314	264	134
Support Groups	117	95	107	95	92	67	66
FRHD Yoga	0	0	9	54	84	93	85
Community Safety	28	49	20	2	0	21	50
Club/ Organizational meetings	268	227	199	170	164	234	184
District Special Events	25	0	0	0	0	0	0
Affiliate Classes (rental)	286	291	333	300	284	218	0
Private Party/ Event					150	0	0
<b>Total Wellness Center Visits (approximate)</b>	<b>889</b>	<b>1028</b>	<b>1249</b>	<b>1292</b>	<b>1229</b>	<b>1072</b>	<b>760</b>

Number of Events 2023	JAN	FEB	MAR	APR	MAY	JUNE	JULY
Affiliate Events	18	16	17	18	17	14	0
Private Events	22	21	21	22	17	20	22
Public Events	38	44	64	78	82	74	64
<b>Total Events</b>	<b>78</b>	<b>81</b>	<b>102</b>	<b>118</b>	<b>116</b>	<b>108</b>	<b>86</b>
Events held by Grantees	18	17	17	12	16	12	5
Private Rental Event	0	0	0	0	1	0	0
Youth Activity	PFCS	PFCS	PFCS	PFCS	PFCS	PFCS	PFCS

**Flyer Distribution:**

- We continue to distribute flyers throughout the community, same as referenced in past reports.

**Community Outreach:**

District staff attended the following events in May:

- Presentation to PEO Group Chapter PF
- Bonsall Chamber of Commerce - Community Expo
- Community HousingWorks Resource Fair
- Backpack Giveaway & Resource Fair

**Press- Village News:**

- Article 7/17/24: "NCFPD revises grant agreement with health care district"
- Article 7/18/24: "FRHD awards its 2024-2025 grants"
- Press Release by D'Vine Path 7/25/24: D'Vine Path accepts \$51,000 FRHD grant"
- Mention 7/30/24: "State Treasure Ma visits Fallbrook"

**Email Marketing & Constant Contact Overview:**

EMAIL MARKETING 2024	JAN	FEB	MAR	APR	MAY	JUNE	JULY
<b>Total Contacts</b>	4320	4381	4452	4458	4491	4,548	4,580
<b>New Contacts Added</b>	69	121	107	63	78	107	59
<b>Net New Contacts</b>	-52	61	71	31	30	48	24
<b>Number of emails sent</b>	30,776	21,727	23,123	18,352	31,776	23,538	23,095
<b>Number of emails opened</b>	15,015	10,169	10,531	7,918	13,040	11,204	9,940
<b>Open rate</b>	54%	52%	50%	47%	45%	53%	47%
<b>Open rate over industry average</b>	18%	14%	12%	9%	6%	18%	12%
<b># of Clicks</b>	412	300	481	410	637	730	547
<b>Click rate</b>	3%	3%	5%	2%	2%	3%	3%
<b>Click rate over industry average</b>	-1%	-2%	1%	0%	0%	1%	1%

**Social Media:**

- In July we saw a increase of almost 10,000 website views. The top pages viewed were Home, Wellness Center and Wellness Walks. This is the highest

	JAN	FEB	MAR	APR	MAY	JUNE	JULY
<b>Website Views</b>	<b>50,125</b>	<b>64,187</b>	<b>78,901</b>	<b>75,090</b>	<b>71,329</b>	<b>73,727</b>	<b>82,880</b>
<b>Facebook</b>	<b>JAN</b>	<b>FEB</b>	<b>MAR</b>	<b>APR</b>	<b>MAY</b>	<b>JUNE</b>	
<b>Overall Reach</b>	18.1 K	13.5K	14,126	13,021	16,571	20,127	16,218
<b>Organic</b>	8,045	10,420	9,809	7,843	9,021	8,378	8,970
<b>Ads</b>	11,038	5,349	5,603	5,836	8,765	11,283	7,975
Content Interactions	229	565	552	458	342	370	287
Followers	1,200	1,200	1,200	1,214	1,218	1,229	1,235
<b>Added Followers</b>	1	17	26	18	11	10	10
Profile Visits	437	472	501	490	518	529	701
Overall Post Link Clicks	93	262	344	90	117	209	125
Audience:							
<b>Age Women</b>	1) 35-44: 20.7% 2) 65+: 18.5% 3) 55-64: 17.4%	1) 35-44 (20.6%) 2) 65+ (18.5%) 3) 55-64 (17.3%)	1) 35-44: 20.4% 2) 65+: 18.8% 3) 55-64: 17.3%	1) 35-44: 20.2% 2) 65+: 18.9% 3) 55-64: 17.3%	1) 35-44: 20.1% 2) 65+: 19.1% 3) 55-64: 17.2%	1) 35-44: 19.8% 2) 65+: 19.2% 3) 55-64: 17.2%	1) 35-44: 19.9% 2) 65+: 19.3% 3) 55-64: 17.3%
<b>Age Men</b>	Men: 1) 55-64: 6.3%; 2) 65+: 4.5%; 3) 35-44: 3.4%	1) 55-64 (6.1%), 2) 65+ (4.4%), 3) 35-44 (3.3%)	1) 55-64: 6.1%; 2) 65+: 4.2%; 3) 35-44: 3.1%	1) 55-64: 6.1%; 2) 65+: 4.1%; 3) 35-44: 3.2%	1) 55-64: 6%; 2) 65+: 4%; 3) 35-44: 3.1%	1) 55-64: 6% 2) 65+: 4% 3) 35-44: 3.4%	1) 55-64: 5.9% 2) 65+: 4% 3) 35-44: 3.5%
<b>Gender</b>	82.2% Women 17.8% Men	82.3% Women 17.7% Men	Women: 82.7% Men: 17.3%	Women: 82.8% Men: 17.2%	Women: 83.1% Men: 16.9%	Women: 82.8% Men: 17.2%	Women: 83% Men: 17%
<b>Fallbrook Residents</b>	48.40%	48.50%	48.90%	48.90%	48.90%	48%	47.70%
<b>Bonsall Residents</b>	3.30%	3.40%	3.60%	3.50%	3.30%	3.40%	3.70%
<b>Rainbow Residents</b>	1.20%	1.40%	1.30%	1.30%	0%	0%	0%
<b>De Luz Residents</b>	0%	0%	0	0	0%	0%	0%
<b>Instagram</b>	<b>JAN</b>	<b>FEB</b>	<b>MAR</b>	<b>APR</b>	<b>MAY</b>	<b>JUNE</b>	<b>JULY</b>

<b>Overall Reach</b>	1100	507	468	557	420	363	479
<b>Organic</b>	428	500	446	548	391	363	455
<b>Ads</b>	679	16	22	17	37	1	27
<b>Content Interactions</b>	182	182	337	305	193	167	254
<b>Followers</b>	628	637	648	659	665	671	680
<b>Added Followers</b>	10	18	14	14	10	8	16
<b>Profile Visits</b>	51	96	51	86	47	46	61
<b>Overall Post Link Clicks</b>	1	0	0	2	4	0	3
<b>Audience:</b>							
<b>Age Women</b>	1) 35-44: 22.8% 2) 45-54: 19.6% 3) 55-64: 14.8%	1) 35-44 (24%) 2) 45-54 (19.1%) 3) 55-64 (15.1%)	1) 35-44: 23.6% 2) 45-54: 19.4% 3) 55-64: 15%	1) 35-44: 23.2% 2) 45-54: 20% 3) 55-64: 15%	1) 35-44: 23.7% 2) 45-54: 19.7% 3) 55-64: 14.7%	1) 35-44: 23.5% 2) 45-54: 19.8% 3) 55-64: 14.7%	1) 35-44: 23.6% 2) 45-54: 19.8% 3) 55-64: 15%
<b>Age Men</b>	1) 35-44: 7% 2) 25-34: 4.2% 3) 45-54: 4.2%	1) 35-44 (6.9%), 2) 45-44 (4.6%), 3) 25-34 (3.8%)	1) 35-44: 7.1% 2) 45-54: 4.6% 3) 25-34: 3.7%	1) 35-44: 7% 2) 45-54: 4.5% 3) 25-34: 3.7%	1) 35-44: 6.7% 2) 45-54: 4.4% 3) 25-34: 3.6%	1) 35-44: 6.6% 2) 45-54: 4.4% 3) 25-34: 3.6%	1) 35-44: 6.8% 2) 45-54: 4.4% 3) 35-44: 3.6%
<b>Gender</b>	79.2% Women 20.8% Men	79.3% Women 20.7% Men	Women: 79.2% Men: 20.8%	Women: 79.4% Men: 20.6%	Women: 79.9% Men: 20.1%	Women: 80% Men: 20%	Women: 80% Men: 20%
<b>Fallbrook Residents</b>	45.10%	47.30%	45.20%	44.20%	43.90%	44.30%	43.10%
<b>Bonsall Residents</b>	6.20%	6.40%	6.80%	6.70%	6.90%	6%	7.10%
<b>Rainbow Residents</b>	0.00%	0.00%	0.00%	0.00%	0%	0%	0%
<b>De Luz Residents</b>	0%	0%	0%	0%	0%	0%	0%

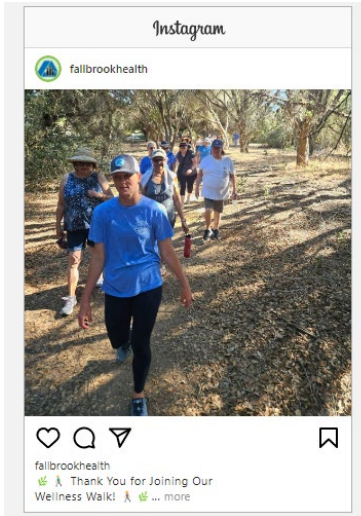




**Facebook Top Post: Mike's Goodbye**

Published: Sat., July 13

- Likes: 13
- Comments: 3
- Shares: 0



**Top Instagram: Wellness Walk Recap**

Published: Sat., July 27

- Likes: 19
- Comments: 1
- Shares: 3

The following are examples of social media ads and boosts. Each month, we target events to run an ad for, and as posts perform well, they will be boosted so more people see the content.

**Preview**

☀️ Join Us for the Upcoming Wellness Walk! ☀️ Get ready to step into wellness with our next Wellness Walk! Lace-up your sneakers and join us for a refreshing stroll filled with good...

Buy tickets

View ad      Edit ad

**Boosted Post: Wellness Walk**

- Duration: 4 Days
- Reach: 1,659
- Link Clicks: 49
- Cost: \$15.00

**Preview**

👤 Empowering Parents: Preventing Teen Dating Violence Presented by: Vista Community Clinic FREE 1-Hour Workshop Gain practical strategies, recognize abuse signs, and...

Buy tickets

View ad      Edit ad

**Boosted Post: Wellness Wednesday - Teen Dating Violence**

- Duration: 28 Days
- Reach: 9,721
- Link Clicks: 104
- Cost: \$50.00

## CHIEF EXECUTIVE OFFICER'S REPORT - AUGUST

### Community Health & Wellness Center:

- Facility construction updates
  - Awaiting new design info for both buildings A and B – nearly complete
  - SiteLogIQ – plans have been submitted to the County, estimated 8-10 weeks before approval. Estimated construction shutdown at the CHWC has been pushed back to October/November.
- The resolution in the Board packet this month is the final piece I need to submit a grant request to the County for water bottle refilling stations at the CHWC. Looking to have three stations: one on either side of Bldg. B and one inside Bldg A.
- I have submitted a grant proposal to the FPUD – Community Benefit Program to support about half the costs (~\$30,000) for the ADA ramps and sidewalk at the Center.

### Clinical Care Option – Pending additional info

- SESAME-Costco telehealth care option. Judith has made contact and we are awaiting additional information to launch the portal. – NO CHANGE
- I had a meeting with the Palomar Health Medical Group regarding their interest in expanding their primary care services and offering an Urgent Care service to the community. I am awaiting their proposal. – NO CHANGE
- With the collapse of the Tri City Hospital District/UCSD merger I have begun looking at other potential partners to approach regarding expansion of services.

### Community Partnerships/Grants:

- Our first Wellness Walk with the Fallbrook Land Conservancy was held on Saturday, July 20<sup>th</sup> at 9am, Meet & Park at Palomares House. The walk gathered about 30 walkers and was well received, even though it was hot!

### Administrative Projects:

- Updated Employee Handbook: Hopefully you've had a chance to review and sent any comments for review in advance.
- Judith and I are working with Jeff, consultants at CSDA and CalPERS to better understand the District's current contract for employee health benefits. Our current contract was written in 2000 and has vague language and terms that will need to be updated. Additionally, we are researching better employee retirement plans. We have a Simple IRA plan in place now, but it is extremely limited and may not serve a younger workforce. – NO CHANGE

### Associations:

ACHD – Annual meeting will be held in Sacramento from Sept 25-27 – Bill, Howard, Rachel, Theresa, Bianca and Jasmine are scheduled to attend.

- We will be presenting about the Lifestyle Change program as a District Best Practice.

CSDA – Annual meeting will be held in Indian Wells from Sept 9-12 – Bill, Howard, Theresa and Raquel are scheduled to attend.

- We were also featured in the San Diego CSDA Chapter Newsletter regarding our Community Resource Navigator:

AUGUST 2024

# San Diego Chapter News

California Special Districts Association



## Special District Spotlight

### **BREAKING BARRIERS: FALLBROOK REGIONAL HEALTH DISTRICT'S COMMUNITY RESOURCE NAVIGATOR SUPPORTS LOCAL RESIDENTS**

The Fallbrook Regional Health District (FRHD) enhances community health and wellness through essential resources, education, and preventive care for Fallbrook, Bonsall, Rainbow, and De Luz. FRHD's Community Resource Navigator Katia Elizondo Márquez plays a key role in connecting area residents with local resources and services by addressing economic barriers and basic needs like housing, food, and transportation.

Recently Ms. Elizondo Márquez assisted a local resident with securing housing services. After having suffered two strokes, two heart attacks, and falling into a medical coma for six months last year, the client had lost everything, and had been homeless since his discharge from the hospital. The client struggled filling out the Housing Transition Navigation Services application, but with Ms. Elizondo Márquez's assistance, the client's application was approved within a day.

FRHD is committed to providing services like the Community Resource Navigator that promote, maintain and improve individual and community health. For more information on FRHD's programs and resources, visit [fallbrookhealth.org](https://fallbrookhealth.org).

As a follow up, Katia's client sent her the following update:

*"Found a home! Just waiting to hear back from Andres. Who is my Housing Navigator in moving forward. I also have my physical therapy back on track.*

*Katia, I appreciate all your help with you being a huge positive impact in my life."*

LAW OFFICES  
**JEFFREY G. SCOTT**

16935 WEST BERNARDO DRIVE, SUITE 170  
SAN DIEGO, CA 92127

\_\_\_\_\_  
(858) 675-9896  
FAX (858) 675-9897

JEFFREY G. SCOTT

*Of Counsel*  
JAMES R. DODSON

Date: August 9, 2024

To: Board of Directors – Fallbrook Regional Health District  
Rachel Mason, CEO

From: Jeffrey G. Scott, General Counsel

Re: **Biennial Conflict of Interest Code Update 2024**

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State law and FPPC regulations require that in every even number year the District's Conflict of Interest Code needs to be reviewed and updated as necessary. The District adheres to the State Model Conflict of Interest Code as provided in Title 2 of the California Code of Regulations.

This year's code has been reviewed by the undersigned and attached is the updated code for Board consideration versions. The main change from 2022 is that the gift ceiling amount has increased from \$520 to \$590. Approval of the Board to the updated code is requested.

**2024 AMENDMENT TO THE EXECUTIVE DIRECTOR  
EMPLOYMENT AGREEMENT**

The Chief Executive Employment Agreement dated May 20, 2019, as amended between Fallbrook Regional Health District (“District”) and Rachel Mason (“Employee”), is hereby amended for 2024 as follows:

1. The term of this Agreement in Section 2 is extended until June 30, 2026.
2. Employee’s annual base salary as amended in Section 3 in the amount of \$162,832 shall be increased 5% effective July 1, 2024, to \$170,973.60.
3. The last sentence of Section 7 is amended to read: “Should District terminate Employee without cause, the District agrees to pay Employee a lump sum severance pay equal to six (6) month’s salary along with six (6) months continuation of health benefits.
3. The terms and conditions of the May 20, 2019, Executive Director Employment Agreement and are restated and shall remain in full force and effect.
4. The effective date of this Amendment is August 14, 2024.

“Employee”:

“District”:

By \_\_\_\_\_  
Rachel Mason  
Chief Executive Officer

By \_\_\_\_\_  
Bill Leach,  
Chair, Board of Directors

**RESOLUTION 464**

**RESOLUTION OF THE BOARD OF DIRECTORS  
OF THE FALLBROOK REGIONAL HEALTH DISTRICT  
APPROVING THE FILING OF AN APPLICATION WITH THE  
COUNTY OF SAN DIEGO FOR COMMUNITY ENHANCEMENT PROGRAM FUNDING**

WHEREAS, the County of San Diego Community Enhancement Program provides funding for non-profit corporations for certain specified purposes; and

WHEREAS, the Fallbrook Regional Health District wants to file an application with County of San Diego for Community Enhancement Program funding.

NOW, THEREFORE, BE IT RESOLVED by the Board of Directors as follows:

- Section 1: Confirms that Fallbrook Regional Health District is a non-profit California corporation or a public agency under the laws of the State of California;
- Section 2: Approves the filing of an application with the County of San Diego for Community Enhancement Program funding during the County’s current fiscal year; and
- Section 3: Authorizes the people listed below to sign a grant agreement with the County of San Diego for Community Enhancement funds for the current fiscal year.

PASSED AND ADOPTED at a regular meeting of the Board of Directors of Fallbrook Regional Health District on August 14, 2024.

1. Print name: \_\_\_\_\_ Signature: \_\_\_\_\_

Title: \_\_\_\_\_

2. Print name: \_\_\_\_\_ Signature: \_\_\_\_\_

Title: \_\_\_\_\_

3. Print name: \_\_\_\_\_ Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Adopted on this 14<sup>th</sup> day of August 2024

\_\_\_\_\_  
Secretary, Board of Directors

## **CONFLICT OF INTEREST CODE OF FALLBROOK REGIONAL HEALTH DISTRICT**

### **A. Standard Code of FPPC**

The Political Reform Act of 1974 (Gov. Code, §§ 81000, et seq.) requires each state and local government agency to adopt and promulgate a conflict of interest code. The Fallbrook Regional Health District has adopted heretofore such a code which should be revised and updated. The Fair Political Practices Commission (“FPPC”) has adopted a regulation (2 Cal. Code of Regs., § 18730) that contains the terms of a standard conflict of interest code, which can be incorporated by reference as a district's code. After public notice and hearing, the standard code may be amended by the FPPC to conform to amendments in the Political Reform Act. Therefore, the terms of 2 California Code of Regulations Section 18730 and any amendments to it duly adopted by the FPPC are hereby incorporated by reference. The regulation and the attached Appendix, designating positions and establishing disclosure categories, shall constitute the conflict of interest code of Fallbrook Regional Health District.

### **B. Adoption of Standard Code of FPPC**

The terms of 2 California Code of Regulations Section 18730 and any future amendments to it duly adopted by the FPPC are hereby incorporated by reference. A copy of Section 18730 as currently enacted is appended hereto for reference purposes. This regulation and the Appendix “A” attached hereto designating officials and employees and Appendix “B” establishing disclosure categories shall constitute the Conflict of Interest Code of the Fallbrook Regional Health District. This Code shall take effect when approved by the Fallbrook Regional Health District Board of Directors and San Diego County Board of Supervisors and shall thereupon supersede all prior codes adopted by the Fallbrook Regional Health District.

### **C. Filing of Statements of Economic Interests**

Pursuant to Section (4) of the standard code, the members of the Board of Directors, Chief Executive Officer, and the designated employees set forth in the appendix shall file statements of economic interests with the Executive Secretary of the Fallbrook Regional Health District, who shall make the statements available for public inspection and reproduction (Gov. Code, § 81008). All original statements will be retained at the District office.

**APPENDIX “A”**

**CONFLICT OF INTEREST CODE  
OF FALLBROOK REGIONAL HEALTH DISTRICT**

General Provisions

D. Designated employees listed in Column I must disclose investments in business entities and sources of income which manufacture, distribute, sell, or supply the goods or services listed in Column II. Current Directors, the CEO, and Chief Administrative Officer are not listed below as these officials manage public investments and, as such, are already subject to Conflicts of Interest and mandatory reporting (Gov. Code, § 87200).

E. Investments in any business entity or sources of income which are entities or persons engaged in the following health care facilities, services, equipment, instruments, materials, supplies, or business listed in the categories.

<u>I</u> <u>Designated Employees</u>	<u>II</u> <u>Categories Disclosed</u>
Candidates Running for the Office of Board of Directors	All
General Counsel	All



**APPENDIX “B”**  
**DISCLOSURE CATEGORIES**

The disclosure categories listed below identify the types of investments, business entities, sources of income, or real property which the Designated Employee must disclose for each disclosure category to which he or she is assigned.

Category 1: All investments and business positions in, and sources of income from, business entities that do business or own real property within the jurisdiction of the District, plan to do business or own real property within the jurisdiction of the District within the next year, or have done business or owned real property within the jurisdiction of the District within the past two (2) years.

Category 2: All interests in real property which is located in whole or in part within, or not more than two (2) miles outside, the jurisdiction of the District.

Category 3: All investments and business positions in, and sources of income from, business entities that are engaged in land development, construction, or the acquisition or sale of real property within the jurisdiction of the District, plan to engage in such activities within the jurisdiction of the District within the next year, or have engaged in such activities within the jurisdiction of the District within the past two years.

Category 4: All investments and business positions in, and sources of income from, business entities that are banking, savings and loan, or other financial institutions.

Category 5: All investments and business positions in, and sources of income from, business entities that provide services, supplies, materials, machinery, vehicles, or equipment of a type purchased or leased by the District.

Category 6: All investments and business positions in, and sources of income from, business entities that provide services, supplies, materials, machinery, vehicles, or equipment of a type purchased or leased by the Designated Employee’s Department.

**Regulations of the Fair Political Practices Commission,  
Title 2, Division 6, California Code of Regulations**

**§ 18730 Provisions of Conflict of Interest Codes**

(a) Incorporation by reference of the terms of this regulation along with the designation of employees and the formulation of disclosure categories in the Appendix referred to below constitute the adoption and promulgation of a conflict of interest code within the meaning of Section 87300 or the amendment of a conflict of interest code within the meaning of Section 87306 if the terms of this regulation are substituted for terms of a conflict of interest code already in effect. A code so amended or adopted and promulgated requires the reporting of reportable items in a manner substantially equivalent to the requirements of Article 2 of Chapter 7 of the Political Reform Act, Sections 81000, et seq. The requirements of a conflict of interest code are in addition to other requirements of the Political Reform Act, such as the general prohibition against conflicts of interest contained in Section 87100, and to other state or local laws pertaining to conflicts of interest.

(b) The terms of a conflict of interest code amended or adopted and promulgated pursuant to this regulation are as follows:

(1) Definitions.

The definitions contained in the Political Reform Act of 1974, regulations of the Fair Political Practices Commission (Regulations, §§ 18110, et seq.), and any amendments to the Act or regulations, are incorporated by reference into this conflict of interest code.

(2) Designated Employees.

The persons holding positions listed in the Appendix are designated employees. It has been determined that these persons make or participate in the making of decisions which may foreseeably have a material effect on economic interests.

(3) Disclosure Categories.

This code does not establish any disclosure obligation for those designated employees who are also specified in Section 87200 if they are designated in this code in that same capacity or if the geographical jurisdiction of this agency is the same as or is wholly included within the jurisdiction in which those persons must report their economic interests pursuant to article 2 of chapter 7 of the Political Reform Act, Sections 87200, et seq.

In addition, this code does not establish any disclosure obligation for any designated employees who are designated in a conflict of interest code for another agency, if all of the following apply:

(A) The geographical jurisdiction of this agency is the same as or is wholly included within the jurisdiction of the other agency;

(B) The disclosure assigned in the code of the other agency is the same as that required under article 2 of chapter 7 of the Political Reform Act, Section 87200; and

(C) The filing officer is the same for both agencies.<sup>(1)</sup>

Such persons are covered by this code for disqualification purposes only. With respect to all other designated employees, the disclosure categories set forth in the Appendix specify which kinds of economic interests are reportable. Such a designated employee shall disclose in his or her statement of economic interests those economic interests he or she has which are of the kind described in the disclosure categories to which he or she is assigned in the Appendix. It has been determined that the economic interests set forth in a designated employee's disclosure categories are the kinds of economic interests which he or she foreseeably can affect materially through the conduct of his or her office.

(4) Statements of Economic Interests: Place of Filing.

The code reviewing body shall instruct all designated employees within its code to file statements of economic interests with the agency or with the code reviewing body, as provided by the code reviewing body in the agency's conflict of interest code.<sup>(2)</sup>

(5) Statements of Economic Interests: Time of Filing.

(A) Initial Statements. All designated employees employed by the agency on the effective date of this code, as originally adopted, promulgated and approved by the code reviewing body, shall file statements within 30 days after the effective date of this code. Thereafter, each person already in a position when it is designated by an amendment to this code shall file an initial statement within 30 days after the effective date of the amendment.

(B) Assuming Office Statements. All persons assuming designated positions after the effective date of this code shall file statements within 30 days after assuming the designated positions, or if subject to State Senate confirmation, 30 days after being nominated or appointed.

(C) Annual Statements. All designated employees shall file statements no later than April 1. If a person reports for military service as defined in the Servicemember's Civil Relief Act, the deadline for the annual statement of economic interests is 30 days following his or her return to office, provided the person, or someone authorized to represent the person's interests, notifies the filing officer in writing prior to the applicable filing deadline that he or she is subject to that federal statute and is unable to meet the applicable deadline, and provides the filing officer verification of his or her military status.

(D) Leaving Office Statements. All persons who leave designated positions shall file statements within 30 days after leaving office.

(5.5) Statements for Persons Who Resign Prior to Assuming Office.

Any person who resigns within 12 months of initial appointment, or within 30 days of the date of notice provided by the filing officer to file an assuming office statement, is not deemed to have assumed office or left office, provided he or she did not make or participate in the making of, or use his or her position to influence any decision and did not receive or become entitled to receive any form of payment as a result of his or her appointment. Such persons shall not file either an assuming or leaving office statement.

(A) Any person who resigns a position within 30 days of the date of a notice from the filing officer shall do both of the following:

- (1) File a written resignation with the appointing power; and
- (2) File a written statement with the filing officer declaring under penalty of perjury that during the period between appointment and resignation he or she did not make, participate in the making, or use the position to influence any decision of the agency or receive, or become entitled to receive, any form of payment by virtue of being appointed to the position.

(6) Contents of and Period Covered by Statements of Economic Interests.

(A) Contents of Initial Statements. Initial statements shall disclose any reportable investments, interests in real property and business positions held on the effective date of the code and income received during the 12 months prior to the effective date of the code.

(B) Contents of Assuming Office Statements. Assuming office statements shall disclose any reportable investments, interests in real property and business positions held on the date of assuming office or, if subject to State Senate confirmation or appointment, on the date of nomination, and income received during the 12 months prior to the date of assuming office or the date of being appointed or nominated, respectively.

(C) Contents of Annual Statements. Annual statements shall disclose any reportable investments, interests in real property, income and business positions held or received during the previous calendar year provided, however, that the period covered by an employee's first annual statement shall begin on the effective date of the code or the date of assuming office whichever is later, or for a board or commission member subject to Section 87302.6, the day after the closing date of the most recent statement filed by the member pursuant to Regulation 18754.

(D) Contents of Leaving Office Statements. Leaving office statements shall disclose reportable investments, interests in real property, income and business positions held or received during the period between the closing date of the last statement filed and the date of leaving office.

(7) Manner of Reporting.

Statements of economic interests shall be made on forms prescribed by the Fair Political Practices Commission and supplied by the agency, and shall contain the following information:

(A) Investment and Real Property Disclosure. When an investment or an interest in real property<sup>(3)</sup> is required to be reported,<sup>(4)</sup> the statement shall contain the following:

1. A statement of the nature of the investment or interest;
2. The name of the business entity in which each investment is held, and a general description of the business activity in which the business entity is engaged;
3. The address or other precise location of the real property;
4. A statement whether the fair market value of the investment or interest in real property equals or exceeds \$2,000, exceeds \$10,000, exceeds \$100,000, or exceeds \$1,000,000.

(B) Personal Income Disclosure. When personal income is required to be reported,<sup>(5)</sup> the statement shall contain:

1. The name and address of each source of income aggregating \$520 or more in value, or \$50 or more in value if the income was a gift, and a general description of the business activity, if any, of each source;
2. A statement whether the aggregate value of income from each source, or in the case of a loan, the highest amount owed to each source, was \$1,000 or less, greater than \$1,000, greater than \$10,000, or greater than \$100,000;
3. A description of the consideration, if any, for which the income was received;
4. In the case of a gift, the name, address and business activity of the donor and any intermediary through which the gift was made; a description of the gift; the amount or value of the gift; and the date on which the gift was received;
5. In the case of a loan, the annual interest rate and the security, if any, given for the loan and the term of the loan.

(C) Business Entity Income Disclosure. When income of a business entity, including income of a sole proprietorship, is required to be reported,<sup>(6)</sup> the statement shall contain:

1. The name, address, and a general description of the business activity of the business entity;
2. The name of every person from whom the business entity received payments if the filer's pro rata share of gross receipts from such person was equal to or greater than \$10,000.

(D) Business Position Disclosure. When business positions are required to be reported, a designated employee shall list the name and address of

each business entity in which he or she is a director, officer, partner, trustee, employee, or in which he or she holds any position of management, a description of the business activity in which the business entity is engaged, and the designated employee's position with the business entity.

(E) Acquisition or Disposal During Reporting Period. In the case of an annual or leaving office statement, if an investment or an interest in real property was partially or wholly acquired or disposed of during the period covered by the statement, the statement shall contain the date of acquisition or disposal.

(8) Prohibition on Receipt of Honoraria.

(A) No member of a state board or commission, and no designated employee of a state or local government agency, shall accept any honorarium from any source, if the member or employee would be required to report the receipt of income or gifts from that source on his or her statement of economic interests.

(B) This section shall not apply to any part-time member of the governing board of any public institution of higher education, unless the member is also an elected official.

(C) Subdivisions (a), (b), and (c) of Section 89501 shall apply to the prohibitions in this section.

(D) This section shall not limit or prohibit payments, advances, or reimbursements for travel and related lodging and subsistence authorized by Section 89506.

(8.1) Prohibition on Receipt of Gifts in Excess of \$590.

(A) No member of a state board or commission, and no designated employee of a state or local government agency, shall accept gifts with a total value of more than \$590 in a calendar year from any single source, if the member or employee would be required to report the receipt of income or gifts from that source on his or her statement of economic interests.

(B) This section shall not apply to any part-time member of the governing board of any public institution of higher education, unless the member is also an elected official.

(C) Subdivisions (e), (f), and (g) of Section 89503 shall apply to the prohibitions in this section.

(8.2) Section 8.2. Loans to Public Officials.

(A) No elected officer of a state or local government agency shall, from the date of his or her election to office through the date that he or she vacates office, receive a personal loan from any officer, employee, member, or consultant of the state or local government agency in which the elected officer holds office or over which the elected officer's agency has direction and control.

(B) No public official who is exempt from the state civil service system pursuant to subdivisions (c), (d), (e), (f), and (g) of Section 4 of Article VII of the Constitution shall, while he or she holds office, receive a personal loan from any officer, employee, member, or consultant of the state or local government agency in which the public official holds office or over which the public official's agency has direction and control. This subdivision shall not apply to loans made to a public official whose duties are solely secretarial, clerical, or manual.

(C) No elected officer of a state or local government agency shall, from the date of his or her election to office through the date that he or she vacates office, receive a personal loan from any person who has a contract with the state or local government agency to which that elected officer has been elected or over which that elected officer's agency has direction and control. This subdivision shall not apply to loans made by banks or other financial institutions or to any indebtedness created as part of a retail installment or credit card transaction, if the loan is made or the indebtedness created in the lender's regular course of business on terms available to members of the public without regard to the elected officer's official status.

(D) No public official who is exempt from the state civil service system pursuant to subdivisions (c), (d), (e), (f), and (g) of Section 4 of Article VII of the Constitution shall, while he or she holds office, receive a personal loan from any person who has a contract with the state or local government agency to which that elected officer has been elected or over which that elected officer's agency has direction and control. This subdivision shall not apply to loans made by banks or other financial institutions or to any indebtedness created as part of a retail installment or credit card transaction, if the loan is made or the indebtedness created in the lender's regular course of business on terms available to members of the public without regard to the elected officer's official status. This subdivision shall not apply to loans made to a public official whose duties are solely secretarial, clerical, or manual.

(E) This section shall not apply to the following:

1. Loans made to the campaign committee of an elected officer or candidate for elective office.

2. Loans made by a public official's spouse, child, parent, grandparent, grandchild, brother, sister, parent-in-law, brother-in-law, sister-in-law, nephew, niece, aunt, uncle, or first cousin, or the spouse of any such persons, provided that the person making the loan is not acting as an agent or intermediary for any person not otherwise exempted under this section.

3. Loans from a person which, in the aggregate, do not exceed \$590 at any given time.

4. Loans made, or offered in writing, before January 1, 1998.

(8.3) Loan Terms.

(A) Except as set forth in subdivision (B), no elected officer of a state or local government agency shall, from the date of his or her election to office through the date he or she vacates office, receive a personal loan of \$520 or more, except when the loan is in writing and clearly states the terms of the loan, including the parties to the loan agreement, date of the loan, amount of the loan, term of the loan, date or dates when payments shall be due on the loan and the amount of the payments, and the rate of interest paid on the loan.

(B) This section shall not apply to the following types of loans:

1. Loans made to the campaign committee of the elected officer.
2. Loans made to the elected officer by his or her spouse, child, parent, grandparent, grandchild, brother, sister, parent-in-law, brother-in-law, sister-in-law, nephew, niece, aunt, uncle, or first cousin, or the spouse of any such person, provided that the person making the loan is not acting as an agent or intermediary for any person not otherwise exempted under this section.
3. Loans made, or offered in writing, before January 1, 1998.

(C) Nothing in this section shall exempt any person from any other provision of Title 9 of the Government Code.

(8.4) Personal Loans.

(A) Except as set forth in subdivision (B), a personal loan received by any designated employee shall become a gift to the designated employee for the purposes of this section in the following circumstances:

1. If the loan has a defined date or dates for repayment, when the statute of limitations for filing an action for default has expired.
2. If the loan has no defined date or dates for repayment, when one year has elapsed from the later of the following:
  - a. The date the loan was made.
  - b. The date the last payment of \$100 or more was made on the loan.
  - c. The date upon which the debtor has made payments on the loan aggregating to less than \$250 during the previous 12 months.

(B) This section shall not apply to the following types of loans:

1. A loan made to the campaign committee of an elected officer or a candidate for elective office.
2. A loan that would otherwise not be a gift as defined in this title.
3. A loan that would otherwise be a gift as set forth under subdivision (A), but on which the creditor has taken reasonable action to collect the balance due.
4. A loan that would otherwise be a gift as set forth under subdivision (A), but on which the creditor, based on reasonable business considerations, has not undertaken collection action. Except in a criminal action, a creditor who claims that a loan is not a gift on the basis of this paragraph has the



burden of proving that the decision for not taking collection action was based on reasonable business considerations.

5. A loan made to a debtor who has filed for bankruptcy and the loan is ultimately discharged in bankruptcy.

(C) Nothing in this section shall exempt any person from any other provisions of Title 9 of the Government Code.

(9) Disqualification.

No designated employee shall make, participate in making, or in any way attempt to use his or her official position to influence the making of any governmental decision which he or she knows or has reason to know will have a reasonably foreseeable material financial effect, distinguishable from its effect on the public generally, on the official or a member of his or her immediate family or on:

(A) Any business entity in which the designated employee has a direct or indirect investment worth \$2,000 or more;

(B) Any real property in which the designated employee has a direct or indirect interest worth \$2,000 or more;

(C) Any source of income, other than gifts and other than loans by a commercial lending institution in the regular course of business on terms available to the public without regard to official status, aggregating \$590 or more in value provided to, received by or promised to the designated employee within 12 months prior to the time when the decision is made;

(D) Any business entity in which the designated employee is a director, officer, partner, trustee, employee, or holds any position of management; or

(E) Any donor of, or any intermediary or agent for a donor of, a gift or gifts aggregating \$590 or more provided to, received by, or promised to the designated employee within 12 months prior to the time when the decision is made.

(9.3) Legally Required Participation.

No designated employee shall be prevented from making or participating in the making of any decision to the extent his or her participation is legally required for the decision to be made. The fact that the vote of a designated employee who is on a voting body is needed to break a tie does not make his or her participation legally required for purposes of this section.

(9.5) Disqualification of State Officers and Employees.

In addition to the general disqualification provisions of section 9, no state administrative official shall make, participate in making, or use his or her official position to influence any governmental decision directly relating to any contract where the state administrative official knows or has reason to know that any party to the contract is a person

with whom the state administrative official, or any member of his or her immediate family has, within 12 months prior to the time when the official action is to be taken:

(A) Engaged in a business transaction or transactions on terms not available to members of the public, regarding any investment or interest in real property; or,

(B) Engaged in a business transaction or transactions on terms not available to members of the public regarding the rendering of goods or services totaling in value \$1,000 or more.

(10) Disclosure of Disqualifying Interest.

When a designated employee determines that he or she should not make a governmental decision because he or she has a disqualifying interest in it, the determination not to act may be accompanied by disclosure of the disqualifying interest.

(11) Assistance of the Commission and Counsel.

Any designated employee who is unsure of his or her duties under this code may request assistance from the Fair Political Practices Commission pursuant to Section 83114 and Regulations 18329 and 18329.5 or from the attorney for his or her agency, provided that nothing in this section requires the attorney for the agency to issue any formal or informal opinion.

(12) Violations.

This code has the force and effect of law. Designated employees violating any provision of this code are subject to the administrative, criminal and civil sanctions provided in the Political Reform Act, Sections 81000-91014. In addition, a decision in relation to which a violation of the disqualification provisions of this code or of Section 87100 or 87450 has occurred may be set aside as void pursuant to Section 91003.

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(1) Designated employees who are required to file statements of economic interests under any other agency's conflict of interest code, or under article 2 for a different jurisdiction, may expand their statement of economic interests to cover reportable interests in both jurisdictions, and file copies of this expanded statement with both entities in lieu of filing separate and distinct statements, provided that each copy of such expanded statement filed in place of an original is signed and verified by the designated employee as if it were an original. See Government Code Section 81004.

(2) See Section 81010 and Regulation 18115 for the duties of filing officers and persons in agencies who make and retain copies of statements and forward the originals to the filing officer.

(3) For the purpose of disclosure only (not disqualification), an interest in real property does not include the principal residence of the filer.

(4) Investments and interests in real property which have a fair market value of less than \$2,000 are not investments and interests in real property within the meaning of the Political Reform Act. However, investments

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or interests in real property of an individual include those held by the individual's spouse and dependent children as well as a pro rata share of any investment or interest in real property of any business entity or trust in which the individual, spouse and dependent children own, in the aggregate, a direct, indirect or beneficial interest of 10 percent or greater.

(5) A designated employee's income includes his or her community property interest in the income of his or her spouse but does not include salary or reimbursement for expenses received from a state, local or federal government agency.

(6) Income of a business entity is reportable if the direct, indirect or beneficial interest of the filer and the filer's spouse in the business entity aggregates a 10 percent or greater interest. In addition, the disclosure of persons who are clients or customers of a business entity is required only if the clients or customers are within one of the disclosure categories of the filer.

## STATS FOR END OF FISCAL YEAR 2023-2024

We are pleased to share the end-of-the-year statistics on the programming at the Community Health & Wellness Center. These insights highlight our community's engagement and the positive impact of our various initiatives.

### Awards & Appointments

- **2023 Bonsall Nonprofit of the Year**
- **ACHD Board of Directors**
  - Representative - Rachel Mason

### Stats on Programming

**12,000**

Visits to  
Community Health  
& Wellness Center

**120**

Trained in Mental  
Health First Aid

**1,237**

Public & Club  
Events

**242**

Attended Wellness  
Wednesday  
Workshops

**1,000**

Visits to Support  
Groups

**71**

Counseling  
Services

**300**

Eye on Health  
Attendance

**25**

Meeting Space  
for Local  
Organizations

### Lifestyle Change Program:

The main goal is to to guide our participants to reduce the likelihood of developing Type 2 Diabetes

**218 lbs.** Weight loss for 1st Cohort

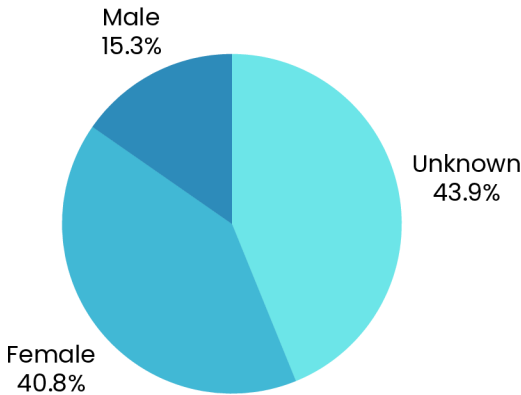
**57% of participants** lost at least 5% of their total weight and decreased their chances of developing Type 2 Diabetes by 71%.

### Top 3 Highest % of Total Weight Loss

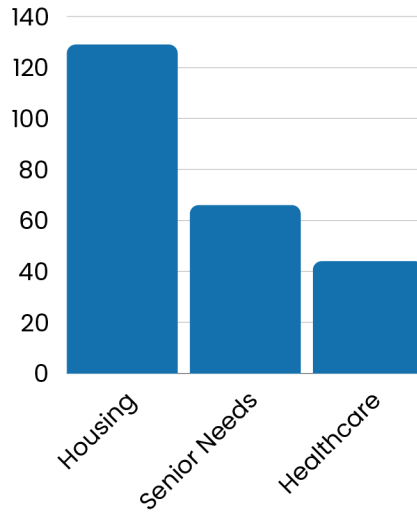
1. -18.59%
2. -15.26%
3. -13.89%

## Community Resource Navigation:

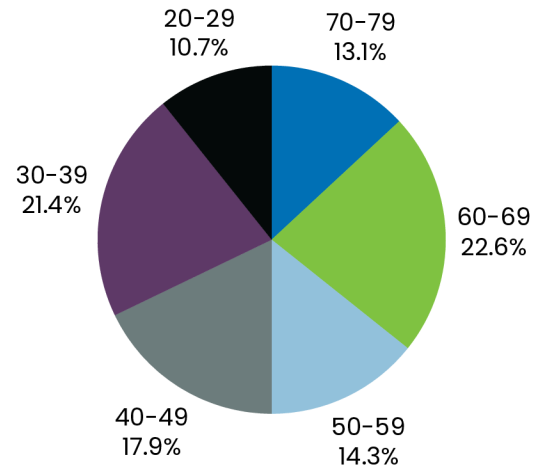
### People by Gender:



### Top 3 Needs:



### Age Range:



**Top 3 Organizations** Community Resource Navigator sent referrals to:

1. Interfaith Community Services
2. Foundation for Senior Care
3. Palomar Family Counseling Service, Inc.

Total Number of Referrals: **142**

Total Number of Outgoing Referrals: **69**

## Blood Drives w/ San Diego Blood Bank:

- **6** Blood drives hosted
- **135 pints** of blood donated
- **405 lives** touched and potentially saved by blood donation
- **99 donors** participated through blood drives
- **18 NEW** donors

## Outreach Events:

- 22 Events
  - 11 Presentations
  - 11 Tabling Event

Majority of the outreach events took place in Fallbrook with a couple in Bonsall

## 5 NEW Programs Launched

- District-Sponsored Chair Yoga
- Living with Type 2 Diabetes
- Mobile Units
  - Interfaith Case Management
  - Fallbrook Family Health Center
- Counseling Services
- Tai Chi for Better Balance

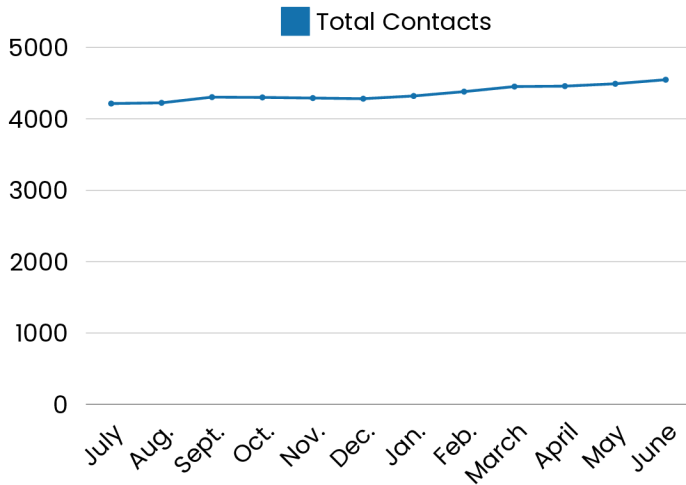
## New Partnerships

- Scripps Whittier Diabetes Institute
- The Skinny Gene Project
- County of San Diego/Live Well San Diego
- Interfaith Community Services
- Fallbrook Family Health Center
- Palomar Family Counseling Service, Inc.
- Fallbrook Food Pantry

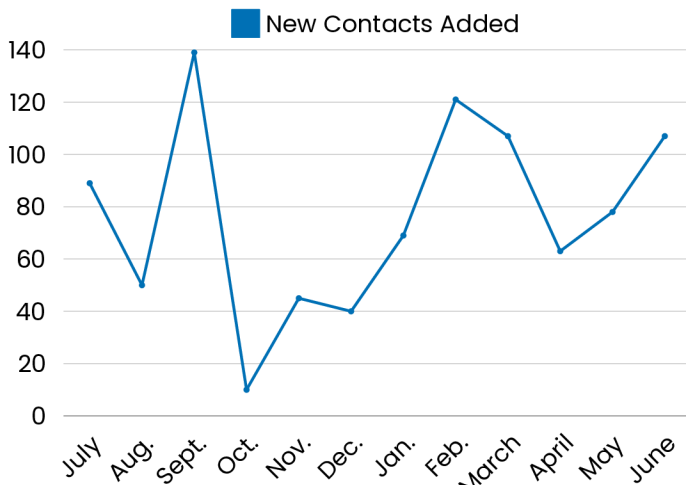
## 17 NEW Workshops & Classes

- Gentle Fitness:
  - RX Ballroom
  - Be Well Yoga
  - Mat Yoga
  - Qi Gong
  - Fun Fu Self Defense
- Workshops:
  - Understanding Alzheimer's & Dementia
  - Food Smarts
  - Setting Boundaries
  - Enough As You Are
  - Health Living
  - Healthy Aging
- Classes:
  - Pool safety & Hands-Only CPR
  - Youth Watercolor
  - Age Well, Drive Smart
  - Putting the Pieces Together

### Email Marketing:



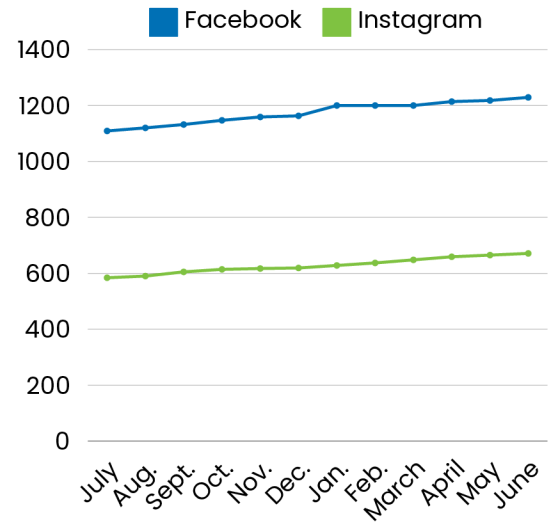
**4,548** Total Contacts



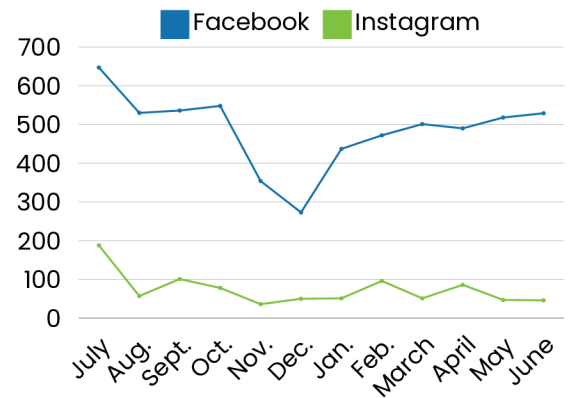
**918** Total New Contacts Added

### Social Media:

#### Follower Count



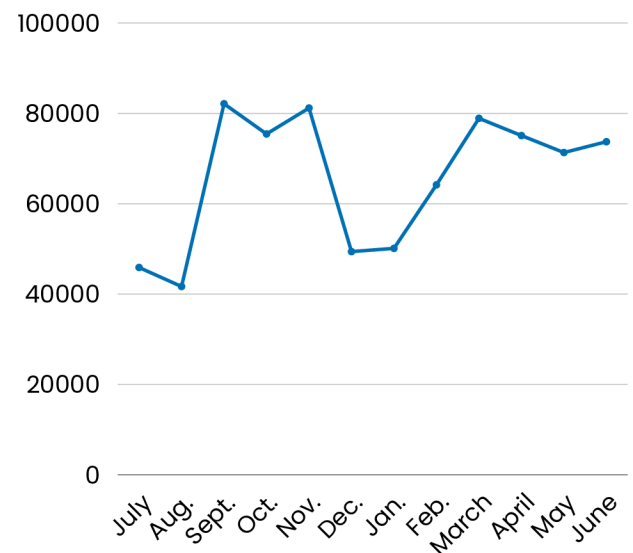
#### Profile Visits



**5,835** Total Facebook Visits

**887** Total Instagram Visits

### Website Visits:



**789,088** Total Visits



EMPLOYEE



Fallbrook Regional  
HEALTH DISTRICT

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# EMPLOYEE HANDBOOK

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[www.fallbrookhealth.org](http://www.fallbrookhealth.org)

August 14, 2024



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## Welcome

### Introductory Statement

*Welcome!* As an employee of the Fallbrook Regional Health District (the “District”), you are an important member of a team effort. We hope that you will find your position with the District rewarding, challenging, and productive.

Because our success depends upon the dedication of our employees, we are highly selective in choosing new members of our team. We look to you and the other employees to contribute to the success of the District.

This employee handbook is intended to explain the terms and conditions of employment of all full- and part-time employees. Written employment contracts between the District and some individuals may supersede some of the provisions of this handbook.

This handbook summarizes the policies and practices in effect at the time of publication. This handbook supersedes all previously issued handbooks and any policy or benefit statements or memoranda that are inconsistent with the policies described here. Your CEO will be happy to answer any questions you may have.

The District adheres to all Federal, State, and local employment laws, and no policy within this handbook is intended to override or supersede these legal requirements.

## General Employment Policies

### At-Will Employment Status

District personnel are employed on an at-will basis. This means that the employment relationship may be terminated at any time with or without reason or advance notice by either the employee or the District. Nothing in this handbook limits the right to terminate at-will employment.

No employee or representative of the District has any authority to enter into an agreement for employment for any specified period of time or to make an agreement for employment on other than at-will terms. Only the CEO of the District has the authority to make any such agreement, which is binding only if it is in writing.

Nothing in this at-will statement is intended to interfere with an employee's rights to communicate or work with others toward altering the terms and conditions of their employment, such as communications regarding wages, scheduling or other terms of employment.

### Right to Revise

This employee handbook contains the employment policies and practices of the District in effect at the time of publication. All previously issued employee policies and any inconsistent policy statements or memoranda are superseded.

The District reserves the right to revise, modify, delete, or add to any and all policies, procedures, work rules, or benefits stated in this handbook at any time, except for the policy of at-will employment.

Any written changes to this handbook will be distributed to all employees so that you will be aware of any new policies or procedures. No oral statements or representations can in any way alter the provisions of this handbook.

This handbook contains the entire agreement between you and the District as to the duration of employment and the circumstances under which employment may be terminated. Nothing in this employee handbook or any other personnel document, including benefit plan descriptions, creates or is intended to create a promise or representation of continued employment for any employee.

Nothing in this statement is intended to interfere with your right to communicate or work with others toward altering the terms and conditions of your employment, such as communications regarding wages, scheduling or other terms or conditions of employment.

## **Equal Opportunity**

The District provides equal employment opportunities to all employees and applicants for employment without regard to race, color, creed, ancestry, national origin, citizenship, sex or gender (including pregnancy, childbirth, and pregnancy-related conditions), gender identity or expression (including transgender status), sexual orientation, marital status, religion, age, disability, genetic information, service in the military, or any other characteristic protected by applicable federal, state, or local laws and ordinances.

Equal employment opportunity applies to all terms and conditions of employment, including hiring, placement, promotion, termination, layoff, recall, transfer, leave of absence, compensation, and training.

## **Commitment to Diversity**

The District is committed to creating and maintaining a workplace in which all employees have an opportunity to participate and contribute to the success of the District and are valued for their skills, experience, and unique perspectives. This commitment is embodied in District policy and the way we conduct business at the Fallbrook Regional Health District.

## **Harassment Discrimination and Retaliation Prevention**

The District expressly prohibits any form of unlawful employee harassment or discrimination based on any of the characteristics mentioned above. Improper interference with the ability of other employees to perform their expected job duties is absolutely not tolerated.

The District will endeavor to make a reasonable accommodation of an otherwise qualified applicant or employee related to an individual's physical or mental disability, sincerely held religious beliefs and practices, and/or any other reason required by applicable law, unless doing so would impose an undue hardship upon the District's business operations.

Any employees with questions or concerns about equal employment opportunities in the workplace are encouraged to bring these issues to the attention of the CEO. The District will not allow any form of retaliation against individuals who raise issues of equal employment opportunity. Employees who feel they have been subjected to any such retaliation should bring it to the attention of the CEO or Legal Counsel.

Retaliation means adverse conduct taken because an individual reported an actual or a perceived violation of this policy, opposed practices prohibited by this policy, or participated in the reporting and investigation process described below. “Adverse conduct” includes but is not limited to:

- (1) Shunning and avoiding an individual who reports harassment, discrimination, or retaliation;
- (2) Express or implied threats or intimidation intended to prevent an individual from reporting harassment, discrimination, or retaliation; or
- (3) Denying employment benefits because an applicant or employee reported harassment, discrimination, or retaliation or participated in the reporting and investigation process.

Other examples of retaliation include firing, demotion, denial of promotion, unjustified negative evaluations, increased surveillance, harassment, and assault.

Complaints of discrimination should be filed according to the procedures described in the Harassment and Complaint Procedure.

## **Harassment Prevention and Training**

The District's policy prohibiting harassment applies to all persons involved in the operation of the District. The District prohibits harassment, disrespectful or unprofessional conduct by any employee of the District, including supervisors and co-workers. The District's anti-harassment policy also applies to vendors, customers, independent contractors, unpaid interns, volunteers, persons providing services pursuant to a contract and other persons with whom you come into contact while working.

Prohibited harassment, disrespectful, or unprofessional conduct includes, but is not limited to, the following behavior:

- Verbal conduct such as epithets, derogatory jokes or comments, slurs, or unwanted sexual advances, invitations, comments, posts, or messages;
- Visual displays such as derogatory and/or sexually-oriented posters, photography, cartoons, drawings, or gestures;
- Physical conduct including assault, unwanted touching, intentionally blocking normal movement, or interfering with work because of sex, race, or any other protected basis;
- Threats and demands to submit to sexual requests or sexual advances, as a condition of continued employment or to avoid some other loss, and offers of employment benefits in return for sexual favors;
- Retaliation for reporting or threatening to report harassment; and
- Communication via electronic media of any type that includes any conduct that is prohibited by state and/or federal law or by District policy.

Sexual harassment does not need to be motivated by sexual desire to be unlawful or to violate this policy. For example, hostile acts toward an employee because of their gender can amount to sexual harassment, regardless of whether the treatment is motivated by sexual desire.

Prohibited harassment is not just sexual harassment but harassment based on any protected category.

All employees shall be required to participate in a District sponsored harassment education and training course within six months of hire and at least once every two-years thereafter. The training programs offered by the District comply with all local, state, and federal requirements.

## **Non-Discrimination**

The District is committed to compliance with all applicable laws providing equal employment opportunities. This commitment applies to all persons involved in District operations. The District prohibits unlawful discrimination against any job applicant, employee or unpaid intern by any employee of the District, including supervisors and coworkers.

Pay discrimination between employees of the opposite sex or between employees of another race or ethnicity performing substantially similar work, as defined by the California Fair Pay Act and federal law, is prohibited. Pay differentials may be valid in certain situations defined by law. Employees will not be retaliated against for inquiring about or discussing wages. However, the District is not obligated to disclose the wages of other employees.

## **Anti-Retaliation**

The District will not retaliate against you for filing a complaint or participating in any workplace investigation or complaint process, and the District will not tolerate or permit retaliation by management, employees, or co-workers.

## **Reasonable Accommodation**

Discrimination can also include failing to reasonably accommodate religious practices or qualified individuals with disabilities where the accommodation does not pose an undue hardship.

To comply with applicable laws ensuring equal employment opportunities to qualified individuals with a disability, the District will make reasonable accommodations for the known physical or mental limitations of an otherwise qualified individual with a disability who is an applicant or an employee unless undue hardship would result.

Any job applicant or employee who requires an accommodation in order to perform the essential functions of the job should contact the CEO and discuss the need for an accommodation. The District will engage in an interactive process with the employee to identify possible accommodations, if any, that will help the applicant or employee perform the job. An applicant, employee, or unpaid intern who requires an accommodation of a religious belief or practice (including religious dress and grooming practices, such as religious clothing or hairstyles) should also contact the CEO and discuss the need for an accommodation. If the accommodation is reasonable and will not impose an undue hardship, the District will make the accommodation.

The District will not retaliate against you for requesting a reasonable accommodation and will not knowingly tolerate or permit retaliation by management, employees, or co-workers.

## Complaint Process

If you believe that you have been the subject of harassment, discrimination, retaliation or other prohibited conduct, bring your complaint to the CEO or alternatively to the District's Legal Counsel following as soon as possible after the incident.

You can bring your complaint to any of these individuals. If you need assistance with your complaint, or if you prefer to make a complaint in person, contact either the CEO or the District's Legal Counsel. Please provide all known details of the incident or incidents, names of individuals involved and names of any witnesses. It would be best to communicate your complaint in writing, but it is not mandatory.

The District encourages all individuals to report any incidents of harassment, discrimination, retaliation or other prohibited conduct forbidden by this policy immediately so that complaints can be quickly and fairly resolved.

You also should be aware that the Federal Equal Employment Opportunity Commission and the California Department of Fair Employment and Housing investigate and prosecute complaints of harassment, discrimination and retaliation in employment. If you think you have been harassed or discriminated against or that you have been retaliated against for resisting, complaining or participating in an investigation, you may file a complaint with the appropriate agency. The nearest office can be found by visiting the agency websites at [calcivilrights.ca.gov/](http://calcivilrights.ca.gov/) and [www.eeoc.gov](http://www.eeoc.gov).

Management must refer all complaints involving harassment, discrimination, retaliation or other prohibited conduct to the District's Legal Counsel, so the District may resolve the complaint.

When the District receives allegations of misconduct, it will immediately undertake a fair, timely, thorough and objective investigation of the allegations in accordance with all legal requirements. The District will reach reasonable conclusions based on the evidence collected.

The District will maintain confidentiality to the extent possible. However, the District cannot promise complete confidentiality. The employer's duty to investigate and take corrective action may require the disclosure of information to individuals with a need to know.

Complaints will be:

- Responded to in a timely manner;
- Kept confidential to the extent possible;
- Investigated impartially by qualified personnel in a timely manner;
- Documented and tracked for reasonable progress;
- Given appropriate options for remedial action and resolution;
- Closed in a timely manner.

If the District determines that harassment, discrimination, retaliation or other prohibited conduct has occurred; appropriate and effective corrective and remedial action will be taken in accordance

with the circumstances involved. The District will also take appropriate action to deter future misconduct.

Any employee determined by the District to have engaged in harassment, discrimination, retaliation or other prohibited conduct will be subject to appropriate disciplinary action, up to, and including termination. Employees should also know that if they engage in unlawful harassment, they can be held personally liable for the misconduct.



## **Hiring**

### **Employment Classifications**

#### **Exempt**

An employee who is in a position that is exempt from Federal and State wage and hour laws relating to the payment of overtime compensation.

#### **Non-Exempt**

An employee who is in a position that is not exempt from Federal and State wage and hour laws relating to the payment of overtime compensation. Employees in these positions are paid hourly and are eligible for overtime compensation.

#### **Regular Employees**

Regular employees are those who are hired to work on a regular schedule. Regular employees may be classified as full-time or part-time.

##### **Full-Time Employees**

Regular full-time employees are those who are scheduled for and do work at least 30 hours per week. Regular full-time employees are eligible for most employee benefits described in this handbook. Benefit eligibility may depend on length of continuous service. Benefit eligibility requirements may also be imposed by the plans themselves or by law.

##### **Part-Time Employees**

Part-time employees are those who are scheduled for and do work fewer than 30 hours per week. Part-time employees are eligible for prorated holiday benefits. Health benefits are not available to part-time employees.

##### **Temporary Employees**

Temporary employees are those employed for short-term assignments. Short-term assignments generally are periods of three months or fewer; however, such assignments may be extended. Temporary employees are not eligible for employee benefits except those mandated by applicable law.

#### **Inactive Status**

Employees who are on any type of leave of absence, work-related or non-work-related, that exceeds any protected state, federal, or local leave of absence will be placed on inactive status.

### **Health Benefits Extension (COBRA)**

Unless a health benefits extension is covered by state or federal law, benefits will terminate according to our insurance carrier's policy. Employees on inactive status may be eligible under the Consolidated Omnibus Budget Reconciliation Act (COBRA) or the California Continuation Benefits Replacement Act (Cal-COBRA) to elect to continue their health care coverage at the employee's expense.

Contact the CEO for more information.

## **Job Duties**

During the introductory period, your supervisor will explain your job responsibilities and the performance standards expected of you. Please keep in mind that your job responsibilities may change at any time during your employment. From time to time, you may be asked to work on special projects, or to assist with other work necessary or important to the operation of your department or the District. Your cooperation and assistance in performing such additional work is expected.

The District reserves the right, at any time, with or without notice, to alter or change job responsibilities, reassign or transfer job positions, or assign additional job responsibilities.

## **New Hires**

The first 90 days of continuous employment at the District is considered an introductory period. During this time, you will learn your responsibilities, get acquainted with co-workers and determine whether or not you are happy with your job. Management will closely monitor your performance.

Completion of the introductory period does not entitle you to remain employed by the District for any definite period of time. Your status as an at-will employee does not change. The employment relationship may be terminated with or without cause and with or without advance notice, at any time by you or the District.

## **Time Off and Leaves of Absence**

### **Bereavement Leave**

The District grants paid leave of absence to employees in the event of the death of the employee's current spouse, registered domestic partner/significant other, child, parent, legal guardian, brother, sister, grandparent, or grandchild; or mother-, father-, sister-, brother-, son-, or daughter-in-law. An employee with such a death in the family may take up to five (5) consecutive scheduled workdays off with pay with the approval of the District. Other important people in the employee's life may be considered for inclusion within this leave policy, such accommodations should be discussed with the CEO. The CEO may approve additional unpaid time off in the event additional time off is needed; a request may be made to use any available accrued vacation time to cover the absence. Documentation may be required to support the bereavement leave benefit (i.e. obituary, a prayer card, or program from the funeral services).

For more information visit [https://calcivilrights.ca.gov/wp-content/uploads/sites/32/2023/04/Bereavement-Leave\\_AB-1949\\_FAQ\\_ENG.pdf](https://calcivilrights.ca.gov/wp-content/uploads/sites/32/2023/04/Bereavement-Leave_AB-1949_FAQ_ENG.pdf)

### **Domestic Violence, Sexual Assault or Stalking Leave and Accommodation**

If you are the victim of domestic violence, sexual assault or stalking, you are eligible for unpaid leave. While the leave is generally unpaid, employees can use their paid sick time under California's Healthy Workplaces, Healthy Families Act for the purposes described below.

You may request leave if you are involved in a legal action, such as obtaining restraining orders, or appearing in court to obtain relief to ensure your or your child's health, safety, or welfare. Please provide reasonable advance notice of the need for leave, unless advance notice is not feasible. Contact the CEO.

If you need a reasonable accommodation for your safety at work, contact the CEO. If you are requesting a reasonable accommodation, you will need to submit a written statement signed by you, or by an individual acting on your behalf, certifying that the accommodation is for the purpose of your safety at work.

For reasonable accommodation requests, the District will also require certification demonstrating that you are the victim of domestic violence, sexual assault or stalking. The District may request recertification every six months. Please notify the District if an approved accommodation is no longer needed.

The District will engage in an interactive process with you to identify possible accommodations, if any, that are effective and will make reasonable accommodations unless an undue hardship will result.

The District will, to the extent allowed by law, maintain the confidentiality of an employee requesting leave or accommodation under these provisions.

### **Domestic Violence, Sexual Assault or Stalking Leave for Treatment**

Employees who are victims of domestic violence, sexual assault or stalking are eligible for unpaid leave. Although the leave is generally unpaid, employees can use their paid sick time under California's Healthy Workplaces, Healthy Families Act for the purposes described below.

You may request leave for any of the following purposes:

- To seek medical attention for injuries caused by domestic violence, sexual assault or stalking;
- To obtain services from a domestic violence shelter, program or rape crisis center as a result of domestic violence, sexual assault or stalking;
- To obtain psychological counseling related to experiencing domestic violence, sexual assault or stalking;
- To participate in safety planning and take other actions to increase safety from future domestic violence, sexual assault or stalking including temporary or permanent relocation.

Please provide reasonable advance notice of the need for leave unless advance notice is not feasible. Contact the CEO.

The District will, to the extent allowed by law, maintain the confidentiality of an employee requesting leave under this provision.

The length of unpaid leave an employee may take is limited to 12 weeks provided for in the federal Family and Medical Leave Act (FMLA) for eligible employees.

### **Extended Medical Leave**

On occasion, an employee may need a medical leave of absence that extends beyond limits under any state or federal mandatory leave law. In addition, there may be circumstances when an employee needs a medical leave allowed under disability laws and in accordance with this policy.

In these situations, an extended medical leave of absence may be granted for medical disabilities (other than pregnancy, childbirth, and related medical conditions) with a doctor's written certificate of disability. Extended disability leaves will also be considered on a case-by-case basis, consistent with the District's obligations under federal and state disability laws.

Employees should request any leave in writing and as far in advance as possible.

A medical leave begins on the first day your doctor certifies that you are unable to work and ends when your doctor certifies that you are able to return to work. The CEO will provide you with a form for your doctor to complete, showing the date you were disabled and the estimated date you will be able to return to work. When returning from a medical disability leave, you must present a doctor's certificate declaring fitness to return to work.

Upon return from medical leave, you will be offered the same position you held at the time your leave began, if available. If your former position is not available, a comparable position will be offered. If neither the same nor a comparable position is available, your return to work will depend on job openings existing at the time of your scheduled return. The District makes no guarantees of

reinstatement, and your return will depend on your qualifications for existing openings. The District will comply with any reinstatement obligations under state or federal law.

California workers' compensation laws govern work-related injuries and illnesses. California pregnancy disability laws govern leaves taken because of pregnancy, childbirth, and related medical conditions.

An employee that needs reasonable accommodations should contact the CEO and discuss the need for an accommodation.

### **Substitution of Paid Leave**

Generally, leave is unpaid. The District may require, or you may choose, to use accrued paid leave while taking leave. In order to use paid leave, you must comply with the District's normal paid leave policies. For more information on those specific circumstances requiring or allowing the substitution of paid leave contact CEO.

### **Time Accrual**

Please contact the CEO with any questions regarding accrual of other District provided paid leave benefits (such as vacation, or sick leave) during unpaid leave.

## **Jury Duty and Witness Leave**

The District encourages employees to serve on jury duty when called. Non-exempt employees who have completed their introductory periods will receive full pay while serving up to ten (10) days of jury duty. Exempt employees will receive full salary unless they are absent for a full week and perform no work. You should notify the CEO of the need for time off for jury duty as soon as a notice or summons from the court is received. You are required to provide written verification from the court clerk of performance of jury service. If work time remains after any day of jury selection or jury duty, you will be expected to return to work for the remainder of your work schedule.

### **Fees Paid by the Court**

Employees may retain any mileage allowance or other fee paid by the court for jury services.

## **Military Leave**

Employees who wish to serve in the military and take military leave should contact the CEO for information about their rights before and after such leave. You are entitled to reinstatement upon completion of military service, provided you return or apply for reinstatement within the time allowed by law.

## **Personal Leave**

A personal leave of absence without pay may be granted at the discretion of the CEO. Requests for personal leave should be limited to unusual circumstances requiring an absence of longer than two (2) weeks. Approved personal absences of shorter duration are not normally treated as leaves, but rather as excused absences without pay.

## Pregnancy Disability Leave

If you are pregnant, have a related medical condition, or are recovering from childbirth, please review this policy. Any employee planning to take pregnancy disability leave (PDL) should advise the CEO as early as possible. Please make an appointment with the CEO to discuss the following conditions:

- The length of pregnancy disability leave will be determined by the advice of a physician, but employees disabled by pregnancy may take up to four months of leave per pregnancy (the working days you normally would work in one-third of a year or 17 1/3 weeks). Part-time employees are entitled to leave on a pro rata basis. The four months of leave includes any period of time for actual disability caused by the pregnancy, childbirth, or related medical condition. This includes leave for severe morning sickness and for prenatal care, doctor-ordered bed rest, as well as other reasons. Your healthcare provider determines how much time you need for your disability.
- The District will also reasonably accommodate medical needs related to pregnancy, childbirth, or related conditions or temporarily transfer you to a less strenuous or hazardous position (where one is available) or duties if medically needed because of your pregnancy.
- If you need to take PDL, you must inform the District when a leave is expected to begin and how long it will likely last. If the need for a leave, reasonable accommodation, or transfer is foreseeable (such as the expected birth of a child or a planned medical treatment for yourself), you must provide at least 30 days' advance notice before the PDL or transfer is to begin. Consult with the CEO regarding the scheduling of any planned medical treatment or supervision in order to minimize disruption to the operations of the District. Any such scheduling is subject to the approval of a health care provider.
- For emergencies or events that are unforeseeable, we need you to notify the District, at least verbally, as soon as practical after you learn of the need for the leave.
- Failure to comply with these notice requirements may result in delay of PDL, reasonable accommodation, or transfer.
- Pregnancy leave usually begins when ordered by a health care provider. You must provide the District with a written certification from a health care provider for need of PDL, reasonable accommodation or transfer. The certification must be returned no later than 15 calendar days after it is requested by the District. Failure to do so may, in some circumstances, delay PDL, reasonable accommodation or transfer. Please see the personnel department for a medical certification form to give to your health care provider.
- Leave returns will be allowed only when a health care provider sends a release; the release to work should indicate whether the employee is released to full duty, with or without restrictions.
- You are allowed to use accrued sick time (if otherwise eligible to take the time) during PDL. You are allowed to use accrued vacation or personal time (if otherwise eligible to take the time) during PDL.

- Leave does not need to be taken in one continuous period of time and may be taken intermittently, as needed. Leave may be taken in increments of 15 minutes.

If intermittent leave or leave on a reduced work schedule is medically advisable you may, in some instances, be required to transfer temporarily to an available alternative position that meets your needs. The alternative position does not need to have equivalent job duties but must have the equivalent rate of pay and benefits, and you must be qualified for the position. The position must better accommodate your leave requirements than your regular job. Transfer to an alternative position can include altering an existing job to better accommodate your need for intermittent leave or a reduced work schedule. This will be evaluated through the interactive process using the healthcare provider's restrictions as a basis to identify reasonable accommodations, if any.

When your health care provider releases you to return to work, from PDL, you will be reinstated to your same position held at the time the leave began or, in certain instances, to a comparable position, if available. There are limited exceptions to this policy. An employee returning from a pregnancy disability leave has no greater right to reinstatement than if the employee had been continuously employed.

If you are on PDL, you will be allowed to continue to participate in group health insurance coverage for up to a maximum of four months of disability leave (if such insurance was provided before the leave was taken) at the level and under the conditions that coverage would have been provided if you had continued in employment continuously for the duration of the leave. In some instances, the District can recover premiums paid to maintain your health coverage if you fail to return from PDL. PDL may impact other benefits or a seniority date. Please contact the CEO for more information.

## **School Appearances Involving Suspension**

If you are the parent or guardian of a child facing suspension from school is summoned to the school to discuss the matter, you should alert your supervisor as soon as possible before leaving work. In agreement with California Labor Code Section 230.7, no discriminatory action will be taken against an employee who takes time off for this purpose.

## **Sick Leave**

The District grants paid sick leave to employees to guard against loss of earnings due to illness. Supervisors have the principal responsibility for the proper and consistent application of the sick leave policy. Abuse of sick leave in any form can have serious impact on the morale and effectiveness of all members of a group or office.

- California provides for mandatory paid sick leave under the Healthy Workplaces, Healthy Families Act (the "Act"). The District's paid sick leave policy complies with the requirements of the Act and the Americans with Disabilities Act (ADA).
- You cannot be discriminated or retaliated against for requesting or using accrued paid sick time.

If you have any questions about paid sick leave, please contact the CEO.

## **Eligible Employees**

All eligible employees who have worked in California for the same employer for 30 or more days within a year from the start of their employment will be entitled to paid sick time.

However, employees are not eligible to take paid sick time until they have worked for the District for 30-days from their date of hire.

### **Sick Pay Amount**

- Eligible full-time employees earn sick leave at the rate of 3.08 hours of paid sick time per pay period. At a minimum, employees will have at least 24 hours of paid sick time by the 120th calendar day of employment, each calendar year or in each 12-month period.
- Eligible part-time employees earn sick leave at 1.0 hour of sick leave for every thirty (30) hours worked.

You will need to meet a 30-day employment requirement before taking any accrued and available leave. Exempt employees are presumed to work 40 hours per workweek for purposes of sick time accrual. If their normal workweek is less than 40 hours, accrual will be based on their normal workweek.

Employees may earn a maximum of 240 hours paid sick time. After you have reached this maximum amount, no additional paid sick time will be earned until some or all of your accrued paid sick time is used. In the case of separation, the District does not pay employees for unused paid sick leave.

### **Qualifying Reasons for Paid Sick Leave**

Paid sick time can be used for the following reasons:

- Diagnosis, care or treatment of an existing health condition for an employee or covered family member, as defined below;
- Preventive care for an employee or an employee's covered family member;
- For certain, specified purposes when the employee is a victim of domestic violence, sexual assault or stalking.

For purposes of paid sick leave, a covered "family member" includes:

- A "child" defined as a biological, foster or adopted child; a stepchild; or a legal ward, regardless of the age or dependency status of the child; a "child" also may be someone for whom you have accepted the duties and responsibilities of raising, even if they are not your legal child;
- A "parent," defined as a biological, foster or adoptive parent; a stepparent; or a legal guardian of an employee or the employee's spouse or registered domestic partner; a parent may also be someone who accepted the duties and responsibilities of raising you when you were a minor child, even if they are not your legal parent;
  - A spouse;
  - A registered domestic partner;
  - A grandparent;
  - A grandchild;
  - A sibling



## Use of Paid Sick Leave

If the need for paid sick leave is foreseeable, you must provide advance oral or written notification to the CEO. If the need for paid sick leave is not foreseeable, provide notice to the CEO as soon as practical.

Use of paid sick time may run concurrently with other leaves under local, state or federal law. Accrued and available sick leave may be used to cover waiting periods for disability insurance or paid family leave benefits with the State of California.

Paid sick leave can be used in one (1) hour increments.

## Use of Paid Sick Leave Before Unpaid Leave

If you are taking an unpaid leave of absence, there are circumstances where you may be required to use your accrued and unused sick leave before taking unpaid leave or having unpaid absences. In other circumstances, you can choose to use sick leave before taking unpaid leave or having unpaid absences, but it is not required. It will depend on the type of leave you are taking and/or any applicable federal and state leave requirements. Please contact the CEO to discuss coordination of your benefits.

## Time Off for Voting

If you do not have sufficient time outside of working hours to vote in an official statewide election, you may take off enough working time to vote, including up to two hours off without loss of pay. This time should be taken at the beginning or the end of the regular working shift, whichever allows for more free time for voting and the least time off work. When possible, an employee requesting time off to vote shall give their supervisor at least two working days' notice.

## Vacation

The District believes that vacation is important to the health and well-being of our employees and encourages all employees to utilize their vacation benefit to balance their work and personal lives. The purpose of offering paid time off is to provide employees with flexibility from work that be used for such needs as vacation, personal or family business, appointments, volunteerism, and other activities of the employee's choice. The District's goal is to provide time for personal rejuvenation and to reduce unscheduled absences.

### Vacation Accrual from First Day

Regular full-time employees are entitled to accrue:

- 1-4 years = 15 days per year; (5 hours per pay period)
  - 5-9 years = 20 days per year; (6.66 hours per pay period)
- 10 years and thereafter = 25 days per year.( 8.33 hours per pay period)

Active service begins on your first day of work and continues thereafter unless broken by an absence without pay, a leave of absence, or termination of employment. Temporary and part-time employees do not accrue paid vacation.

Vacation can accrue up to a maximum of five (5) paid weeks/200 hours. No additional vacation will be earned until accrued vacation time is used.

You become eligible to take accrued vacation after 30 days of active service as work schedules permit.

Vacations are scheduled to provide adequate coverage of job responsibilities and staffing requirements. Every effort will be made to permit employees to take their vacations at the times they wish. However, the District's operating needs will take priority. Accordingly, vacation schedules must be coordinated with and approved by a supervisor in advance. Employees must submit a request in writing for vacation well in advance of the dates desired.

When your employment relationship with the District ends, you will be paid for accrued unused vacation days.

### **Use of Vacation Before Unpaid Leave**

If you are taking an unpaid leave of absence, there are circumstances where you may be required to use your accrued and unused vacation before taking unpaid leave or having unpaid absences. In other circumstances, you can choose to use vacation before taking unpaid leave or having unpaid absences. It will depend on the type of leave you are taking and/or federal and state leave requirements.

Please contact the CAO or CEO to discuss coordination of your benefits.

### **Victims of Crime Leave**

If you are the victim, or the family member of a victim of certain serious crimes, you may take time off from work to attend judicial proceedings related to the crime or to attend proceedings involving rights of the victim.

If you are the family member of a crime victim, you may be eligible to take this leave if you are the crime victim's spouse, parent, child or sibling. Other family members may also be covered, depending on the purpose of the leave.

The absence from work must be in order to attend judicial proceedings or proceedings involving rights of the victim. Only certain crimes are covered. You must provide reasonable advance notice of your need for leave and documentation related to the proceeding may be required. If advance notice is not possible, you must provide appropriate documentation within a reasonable time after the absence.

Any absences from work to attend judicial proceedings or proceedings involving victim rights are unpaid, unless you choose to use accrued and unused vacation leave benefits.

For more information regarding this leave (including whether you are covered, when and what type of documentation is required and which type of paid time off can be used), please contact the CAO OR CEO.

### **Volunteer Civil Service Personnel**

No employee shall be disciplined for taking time off to perform emergency duty as a volunteer firefighter, peace officer, or emergency rescue personnel. Employees who perform emergency duty as a volunteer firefighter, reserve peace officer, or emergency rescue personnel may also take up to a total of fourteen days' unpaid leave time per calendar year to engage in required fire, law enforcement or emergency rescue training.

Please alert your supervisor that you may have to take time off for emergency duty or emergency duty training. When taking time off for emergency duty, please alert the CAO OR CEO before doing so when possible.

## Benefits

### Benefits Overview

The District is committed to providing the following benefits for eligible employees. Benefit eligibility may be dependent upon your employee classification (full-time versus part-time, for example) and on length of continuous employment at the District. Benefit eligibility requirements may also be imposed by the plans themselves. . For information regarding employee benefits and to answer any questions, contact the Chief Administrative Officer or CAO OR CEO.

The District reserves the right to modify, amend, or terminate benefits and to modify or amend benefit eligibility requirements at any time and for any reason, subject to any legal restrictions. The District offers the following employee benefits, after 30 days of continuous employment at the District, on the 1<sup>st</sup> of the month following hire date:

- Health Insurance
- Dental Insurance
- Vision Insurance
- Retirement

### Medical and Ancillary Health Benefits

The District participates in the California Public Employees' Retirement System for access to Medical Benefits.

Premiums for the dental, and vision plans you elect to participate in are deducted from your pay on a pre-tax basis. This is a benefit to you, as it lowers your income tax liability for the year. However, Internal Revenue Service ("IRS") regulations mandate when and why you can make changes to these benefits elections during the Plan year (calendar year).

You may make changes during the Plan year only within 31 days of a "qualified life status change" or "life event," as defined by the IRS. Such events can include, but may not be limited to, marriage or divorce; birth, adoption or death of a qualified dependent; spousal loss or gain of other coverage.

Please note that changes in coverage must be "consistent with life event." For example, if you are not enrolled in our benefits, a divorce could be life status change that would qualify you to enroll in our benefits during the Plan year IF you lost other coverage because of the change in marital status and you enrolled in our benefits within 31 days of your loss of coverage. If you did not have coverage at all, and therefore did not lose other coverage as a result of the divorce, that event would not qualify you to enroll in our coverage during the Plan year.

### Retirement Plan

The District offers its full-time and part-time employees the ability to participate in its SIMPLE IRA retirement program which is regulated by federal law. Employees may enroll in the plan once they have completed one (1) month of service and are at least 18 years of age.

Pursuant to the plan, the District contributes a Dollar-for-Dollar Match for the first three percent (3%) of employee's compensation. Employees may defer pay into the plan, but must not exceed the

IRS deferral limit. These voluntary contributions must be whole percentages of not less than 1%. Specifics of the plan are available from the Chief Administrative Officer.

## Holidays

The District observes the following paid holidays:

- January 1 (New Year's Day)
- Martin Luther King Jr.'s Birthday
- Presidents' Day
- Cesar Chavez Day
- Memorial Day
- Juneteenth
- July 4th (Independence Day)
- Labor Day
- Columbus Day
- Veteran's Day
- Thanksgiving Day and the Friday after
- Christmas Eve
- Christmas Day

When a holiday falls on a Saturday or Sunday, it is usually observed on the preceding Friday or the following Monday. However, the District may grant another day off in lieu of closing. Holiday observances will be announced in advance.

Non-exempt employees are eligible for paid holidays after 30 days of continuous employment at the District.

Holidays that are paid but not worked do not count for overtime purposes. To be eligible for a paid holiday, you must be regularly scheduled to work on the day on which the holiday is observed and must work your regularly scheduled working days immediately before and immediately after the holiday, unless an absence on either day is approved in advance by your supervisor or the absence is otherwise protected by law. If you are required to work on a paid scheduled holiday you will receive straight time.

**Religious observances.** Employees who need time off to observe religious practices or holidays not already scheduled by the District should speak with their supervisor. Employees may be able to switch a scheduled day with another employee, take vacation time, or take off unpaid days. The District will seek to reasonably accommodate individuals' religious observances.

## Lactation Accommodation

The District recognizes lactating employees' rights to request lactation accommodation and accommodates lactating employees by providing a reasonable amount of break time and a suitable lactation location to any employee who desires to express breast milk for their infant child, subject to any exemption allowed under applicable law.

If possible, the break time should run concurrently with your normally scheduled break time. Any break time to express breast milk that does not run concurrently with your normally scheduled break time is unpaid.

The lactation location will be private (shielded from view and free from intrusion from co-workers and the public) and located close to your work area. The location will be safe, clean, and free of toxic or hazardous materials; have a surface to place a breast pump and other personal items; have a place to sit; and have access to electricity or alternative devices (including, but not limited to extension cords or charging stations) needed to operate an electric or battery-powered breast pump. The District will also provide access to a sink with running water and a refrigerator suitable for storing milk in close proximity to your workspace. If a refrigerator cannot be provided, the District will provide another cooling device suitable for storing milk, such as an employer-provided cooler. The lactation location will not be a bathroom or restroom. The room or location may include an employee's private office if it otherwise meets the requirements of the lactation space. Multi-purpose rooms may be used as lactation space if they satisfy the requirements for space; however, use of the room for lactation takes priority over other uses for the time it is in use for lactation purposes.

Employees who desire lactation accommodations should contact the CAO or CEO to request accommodations. An employee's request may be provided orally, by email, or in writing, and need not be submitted on a specific form. We will engage in an interactive process with you to determine when and where lactation breaks will occur. If we cannot provide break time or a location that complies with this policy, we will provide a written response to your request.

The District will not tolerate discrimination or retaliation against employees who exercise their rights to lactation accommodation, including those who request time to express milk at work and/or who lodge a complaint related to the right to lactation accommodation. If you believe you have been denied reasonable break time or adequate space to express milk or have otherwise been denied your rights related to lactation accommodation, you have the right to file a complaint with the Labor Commissioner.

## **Paid Family Leave**

Employees may be eligible for Paid Family Leave (PFL) wage replacement benefits, which are funded through payroll deductions and coordinated through the Employment Development Department (EDD). PFL provides partial pay for up to six weeks when you need to take leave from work to care for a parent, parent-in-law, child, spouse, registered domestic partner, grandparent, grandchild, or sibling who is seriously ill, or if you want time to bond with your newborn, foster child or newly adopted child. The PFL program does not provide employees with a right to a leave of absence; it is limited to a state-mandated wage replacement benefit.

## **Professional Development**

Some employees may need to attend training programs, seminars, conferences, lectures, meetings, or other outside activities for the benefit of the District or the individual employees. Attendance at such activities, whether required by the District or requested by individual employees, requires the written approval of the CEO. To obtain approval, any employee wishing to attend an activity must

submit a written request detailing all relevant information, including date, hours, location, cost, expenses, and the nature, purpose, and justification for attendance.

Attendance at any such event is subject to the following policies on reimbursement and compensation. For attendance at events required or authorized by the District, customary and reasonable expenses will be reimbursed upon submission of proper receipts. Acceptable expenses generally include registration fees, materials, meals, transportation, and parking. Reimbursement policies regarding these expenses should be discussed with the CEO in advance.

Employee attendance at authorized outside activities will be considered hours worked for non-exempt employees and will be compensated in accordance with normal payroll practices. This policy does not apply to an employee's voluntary attendance, outside of normal working hours, at formal or informal educational sessions, even if such sessions generally may lead to improved job performance. While the District generally encourages all employees to improve their knowledge, job skills, and promotional qualifications, such activities do not qualify for reimbursement or compensation under this policy unless prior written approval is obtained as described previously.

## **Education Assistance Program**

The District is proud to offer a Tuition Reimbursement Program to help current eligible employees further their education. The program's intent is to expand the employee's knowledge, skills and abilities, and thereby, enhance job performance, value to the organization, and access to job/career opportunities.

The Tuition Reimbursement Program is open only to fulltime regular employees in good standing who have completed one (1) year of employment. Coursework must be pre-approved and must be related to the employee's current job, or a future job in support of the District's mission and objectives. Courses must be provided by an accredited trade school or institution of higher learning (including on-line programs). Courses must be taken on the employee's time or during approved time-off.

The District Board establishes an annual allocation for this benefit; benefits limits will be adjusted for employees who receive educational benefits through a federal or state Veteran's educational benefit program, for a benefit total not to exceed the annual benefit allocation. By law, tax-free benefits under an educational assistance program are limited to the maximum amount allowed under IRS limitations per year<sup>1</sup>. Employees may utilize this benefit up to four times – consecutive years are not required per degree or certificate program. Employees will be required to fulfill one year of employment per tuition reimbursement period. If an Employee voluntarily leaves the District before the one-year time period, she/he will be required to pay back the reimbursement to the District.

Eligible expenses include tuition, registration fees, textbooks, and laboratory fees if any. Ineligible expenses include parking, travel, meals, and other incidentals. Graded courses must be completed with a grade of "C" or better; non-graded courses must receive a "Pass" designation. Courses that are audited or marked incomplete are not eligible for reimbursement. A copy of the final transcript must be provided for reimbursement.

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<sup>1</sup> <https://www.irs.gov/newsroom/tax-benefits-for-education-information-center>

## Student Loan Repayment Assistance

For student loan reimbursements, qualified education loans must have been for the employee's own education. The loan must have been used to obtain a Certification or Degree relevant to the employee's job with the District. Proof of completion of the Degree and student loan payments will be required to obtain reimbursement. The student loan reimbursement shall remain in place as long as it is permitted under Internal Revenue Code Section 127, which currently ends December 31, 2025

Employees are eligible to utilize either Tuition Reimbursement or Student Loan Repayment benefits, but not both simultaneously or within the same calendar year.

## Workers' Compensation

The District, in accordance with state law, provides insurance coverage for employees in case of work-related injury or illness. The workers' compensation benefits provided to injured employees may include:

- Medical care;
- Cash benefits, tax free, to replace lost wages; and
- Assistance to help qualified injured employees return to suitable employment.

To ensure that you receive any workers' compensation benefits to which you may be entitled, you need to:

- Immediately report any work-related injury to your supervisor;
- Seek medical treatment and follow-up care if required;
- Complete a written Employee's Claim for Workers' Compensation Benefits (DWC Form 1) and return it to CEO; and
- Provide the District with a certification from your health care provider regarding the need for workers' compensation disability leave, as well as your eventual ability to return to work from the leave.

Upon submission of a medical certification that an employee is able to return to work after a workers' compensation leave, the employee under most circumstances will be reinstated to their same position held at the time the leave began, or to an equivalent position, if available. An employee returning from a workers' compensation leave has no greater right to reinstatement than if the employee had been continuously employed rather than on leave.

An employee's return depends on their qualifications for any existing openings. If, after returning from a workers' compensation disability leave, an employee is unable to perform the essential functions of their job because of a physical or mental disability, the District's obligations to the employee may include reasonable accommodation, as governed by the Americans with Disabilities Act (ADA), or the California Fair Employment and Housing Act (FEHA).

The law requires the District to notify the workers' compensation insurance District of any concerns of false or fraudulent claims.



## **Paid Sick Leave and Workers' Compensation Benefits**

Paid sick leave is a benefit that also covers absences for work-related illness or injury. Employees who have a work-related illness or injury are covered by workers' compensation insurance. However, workers' compensation benefits usually do not cover absences for medical treatment. When you report a work-related illness or injury, you will be sent for medical treatment, if treatment is necessary. You will be paid your regular wages for the time you spend seeking initial medical treatment.

Any further medical treatment will be under the direction of the health care provider. Any absences from work for follow-up treatment, physical therapy or other prescribed appointments will not be paid as time worked. If you have accrued and unused sick leave, you may choose to substitute paid sick leave for any time that would otherwise be unpaid.

If you do not have accrued, paid sick leave, or if you have used all of your sick leave, you may choose to substitute vacation/paid time off for further absences from worked, related to your illness or injury.

## Employee Management

### Employee Property

An employee's personal property, including but not limited to packages, briefcases, purses, messenger bags, and backpacks, may be inspected upon reasonable suspicion of unauthorized possession of District property, possession of dangerous weapons or firearms, or abuse of the District's drug and alcohol policy.

### Employment of Relatives

Relatives of present employees or relatives of the District's current and former Board of Directors are not eligible for employment with the District. The District defines "relatives" as spouses, registered domestic partners, children, siblings, parents, in-laws, and step-relatives. Present employees who marry or become registered domestic partners will be permitted to continue working in the job position held only if they do not work in a direct supervisory relationship with one another or in job positions involving conflict of interest.

In the event that two employees marry, become registered domestic partners, or become related through marriage or domestic partnership, only one of the two employees may remain as an employee of the District. The employees in question will have no more than 30 calendar days to decide which person will remain in the District's employment. If the decision is not made within the specific timeframe, the CEO of the District will make that decision, relying on the business needs of the organization.

### Names and Addresses Policy

The District is required by law to keep current all employees' names and addresses. You are responsible for notifying the District in the event of a name or address change.

### Open-Door Policy

Suggestions for improving the operations of the District are always welcome. At some time, you may have a complaint, suggestion, or question about your job, your working conditions, or the treatment you are receiving. Your complaints, questions, and suggestions are important to us.

If you have a complaint, suggestion or question, speak with the CEO as soon as possible. If you are not comfortable speaking with the CEO, please bring the issue to the District's Legal Counsel.

Also, if you have raised the issue and if the problem persists, you may present it to the CEO, who will investigate and provide a solution or explanation.

In the event that the CEO is unable to resolve the issue, you may escalate your concerns to the District Legal Counsel; the District Legal Counsel will attempt to reach a final resolution.

While a written complaint will assist us in investigating your concerns, it is not required that you put your complaint in writing. If you need assistance with your complaint, or you prefer to make a complaint in person, contact the CEO of District Legal Counsel.

This procedure, which we believe is important for both you and the District, cannot guarantee that every problem will be resolved to your satisfaction. However, please know that the District values your observations and you should feel free to raise issues of concern without the fear of retaliation.

## **Performance Evaluations**

Each employee will receive periodic performance reviews conducted by the CEO. Your first performance evaluation will take place after the completion of the 90-day introductory period. Subsequent performance evaluations will generally be conducted on an annual basis. The frequency of performance evaluations may vary depending upon length of service, job position, past performance, changes in job duties, or recurring performance problems.

Your performance evaluations may review factors such as the quality and quantity of the work you perform, your knowledge of the job, your initiative, your work attitude, and your attitude toward others. The performance evaluations are intended to make you aware of your progress, areas for improvement, and objectives or goals for future work performance. Favorable performance evaluations do not guarantee increases in salary or promotions. Salary increases and promotions are solely within the discretion of the CEO, subject to budget approval by the Board, and may depend upon many factors in addition to performance. After the review, you will be required to sign the evaluation report simply to acknowledge that it has been presented to you, that you have discussed it with the CEO, and that you are aware of its contents.

## **Personnel Records**

You have a right to inspect or receive a copy of the personnel records that the District maintains relating to your performance or to any grievance concerning you. Certain documents may be excluded or redacted from your personnel file by law, and there are legal limitations on the number of requests that can be made.

Any request to inspect or copy personnel records must be made in writing to the CEO. You can obtain a form for making such a written request from the CEO.

You may designate a representative to conduct the inspection of the records or receive a copy of the records. However, any designated representative must be authorized by you in writing to inspect or receive a copy of the records. The District may take reasonable steps to verify the identity of any representative you have designated in writing to inspect or receive a copy of your personnel records.

The personnel records may be made available to you either at the place where you work or at a mutually agreeable location (with no loss of compensation for going to that location to inspect or copy the records). The records will be made available no later than 30 calendar days from the date the District receives your written request to inspect or copy your personnel records (unless you/your representative and the District mutually agree in writing to a date beyond 30 calendar days but no later than 35 calendar days from receipt of the written request).

If you request a copy of the contents of your file, you will be charged the actual cost of copying.

Disclosure of personnel information to outside sources, other than your designated representative, will be limited. However, the District will cooperate with request from authorized law enforcement or local, state, or federal agencies conducting official investigations and as otherwise legally required.

## **Remote Work**

Working remotely, also referred to as “telecommuting,” provides employees with an opportunity to work from an alternative work environment instead of in the primary location of the District. Working remotely must be pre-approved by your supervisor and cannot be initiated without a Remote Workers Agreement, unless authorized to do so by the CEO.

The District retains the right in its sole discretion to designate positions that are appropriate for working remote and approve employees for working remotely. Working remotely must be approved by your supervisor. Working remotely does not change the conditions of employment or required compliance with all District policies and procedures.

The District reserves the right to change or terminate the Remote Workers Agreement at any time, without cause or advance notice. Your ability to work under a Remote Workers Agreement rests in the sole discretion of the District.

Working remotely is a privilege and may not be appropriate for all employees. If you wish to request a Remote Workers Agreement, you should contact your supervisor and ask for a Remote Work Request form.

### **Remote Work Safety**

Remote workers are solely responsible for ensuring the safety of their alternative work environment. However, because the District is legally obligated to provide its employees with a workplace that is free from hazards that might cause serious harm or injury, the District reserves the right to periodically inspect a Remote Worker's home workspace. Any such inspection will be preceded by advance notice and an appointment will be scheduled.

Remote Workers are protected by the District's workers' compensation insurance. As such, Remote Workers are required to immediately report any injuries that occur while working. The Remote Worker is liable for any injuries that occur to third parties at or around the Remote Worker's alternative work environment.

### **Remote Work Plan**

All Remote Workers are required to sign a Remote Workers Agreement with the CEO that outlines the Remote Worker's the days and work hours (as applicable); equipment the Remote Worker will need; how the Remote Worker will communicate with the District; use of support or secretarial staff; and other appropriate information.

The District has authorized all employees to immediately assume remote work in the event of a natural disaster, pandemic, or other emergency recognized by the District.

## **Hours of Work for Remote Workers**

Unless otherwise agreed in the Remote Workers Agreement, hours and days of work will not change. Employees agree to apply themselves during work hours.

Nonexempt employees agree not to work outside of scheduled hours without advance approval; this includes such activities as checking and responding to emails. Any work outside of a scheduled shift must be reported to a supervisor.

Working remotely is not intended as a substitute for childcare or care for another adult. If a child or adult needs care during work time, another responsible individual is expected to be present.

## **Attendance at Meetings**

Remote workers are expected to attend all required meetings.

## **Costs Associated with Remote Work**

The District shall not incur additional costs due to a Remote Workers Agreement. The Remote Workers Agreement will specify any costs the District will cover.

## **Emergency Closings**

The District will always make every attempt to be open for business. In situations in which some employees are concerned about their safety, management may advise that the office is not officially closed, but employees may choose to leave the office if they feel uncomfortable.

If the office is officially closed during the course of the day to permit employees to leave early, nonexempt employees who are working on-site as of the time of the closing will be paid for a full day. If employees leave earlier than the official closing time, they will be paid only for actual hours worked, or they can take PTO time. Exempt employees will be paid for a normal full day but are expected to complete their work at another time.

## **Workplace Privacy - Audio/Video Recordings**

It is our goal to respect the individual privacy of its employees and at the same time maintain a safe and secure workplace. When issues of safety and security arise, employees may be requested to cooperate with an investigation. The investigation may include the following procedures to safeguard the company and its employees: searches of personal belongings, searches of work areas, searches of private vehicles on company premises, medical examinations, and the like. Failure to cooperate with an investigation is grounds for termination. Providing false information during any investigation may lead to discipline, including termination.

Employees are expected to make use of company facilities only for the business purposes of the company. Accordingly, materials that appear on company hardware or networks are presumed to be for business purposes, and all such materials are subject to review by the company at any time without notice to the employees.

Employees do not have to have any expectation of privacy with respect to any material on company property. The District regularly monitors its communications systems and networks as allowed by law. Monitored activity may include voice, e-mail, and text communications, as well as Internet search and browsing history. Employees who make excessive use of the communications system for personal matters are subject to discipline. Employees are expected to keep personal communication to a minimum and to emergency situations.

### **Video surveillance.**

As part of its security measures and to help ensure a safe workplace, the District has positioned video cameras to monitor various areas of its facilities. Video cameras will not be used in private areas, such as break rooms, restrooms, locker/dressing rooms, etc.

Due to concerns regarding the potential for invasion of privacy, sexual or other harassment, and protection of proprietary or confidential information, employees may not use any audio or video recording devices while on working time. You also may not use any audio or video recordings in work areas that the District has identified as confidential, secure or private, unless you are engaged in protected activity related to improving the terms and conditions of your employment, such as documenting health and safety issues

### **Privacy—Social Security Numbers**

This policy and procedure explain the District's general standards and practices for how Social Security numbers are gathered, stored, disclosed, and ultimately disposed of.

It is the District's policy that Social Security numbers obtained from employees, vendors, contractors, customers, or others are confidential information. Social Security numbers will be obtained, retained, used, and disposed of only for legitimate business reasons and in accordance with the law and this policy.

Documents or other records containing employee Social Security numbers generally will be requested, obtained, or created only for legitimate business reasons consistent with this policy. For example, Social Security numbers may be requested from employees for tax reporting purposes (i.e., Internal Revenue Service (IRS) Form W-4), for new hire reporting, or for purposes of enrollment in the company's employee benefit plans.

All records containing Social Security numbers (whether partial or complete) will be maintained in secure, confidential files with limited access.

Unauthorized use/disclosure of Social Security numbers. Any employee who obtains, uses, or discloses Social Security numbers for unauthorized purposes or contrary to the requirements of this policy and procedure may be disciplined, up to and including discharge. The District will cooperate with government investigations of any person alleged to have obtained, used, or disclosed Social Security numbers for unlawful purposes.

## District Property

### Employer Property

Furniture, desks, computers, data processing equipment/software, and vehicles are District property and must be maintained according to District rules and regulations. They must be kept clean and are to be used only for work-related purposes. The District reserves the right to inspect all District property including computer or phone data or messages to ensure compliance with its rules and regulations, without notice to the employee and at any time, not necessarily in the employee's presence. Prior authorization must be obtained before any District property may be removed from the premises.

District voice mail and/or electronic mail (e-mail) including texting, and mobile email are to be used for business purposes. The District reserves the right to monitor voice mail messages, and e-mail messages, and texts to ensure compliance with this rule, without notice to the employee and at any time, not necessarily in the employee's presence.

The District may periodically need to assign and/or change "passwords" and personal codes for:

- Email;
- voice mail;
- cell phones;
- computers and tablets;
- District's social media accounts.

These communication technologies and related storage media and databases are to be used only for District business and they remain the property of the District.

The District reserves the right to keep a record of all passwords and codes used and/or may be able to override any such password system. Messages on the District voice-mail and email systems are subject to the same District policies against discrimination and harassment as are any workplace communications. Offensive, harassing or discriminatory content in such messages will not be tolerated.

For security reasons, employees should not leave personal belongings of value in the workplace. Terminated employees should remove any personal items at the time they leave Fallbrook Regional Health District. Personal items left in the workplace are subject to disposal if not claimed at the time of an employee's termination.

### Guests and Visitors

Visits from friends and family should be kept to a minimum, in order to preserve an appropriate work environment. It is extremely important that the impression left with District visitors is that of a professional organization with the highest standards of conduct.

Emergencies in which children must be in the office for an extended length of time are to be kept to an absolute minimum. The District may not be used as a substitute for regular childcare of

employees' children. On those occasions when children are present, they should not be allowed to disrupt others in the office.

Your child is your responsibility and must be under your direct supervision at all times. If a child is ill, you must present a doctor's note to your immediate supervisor indicating the child is not contagious. Under no circumstances may children provide work for the District, unless the child is hired as an employee pursuant to District policies.

## **Housekeeping**

All employees are expected to keep their work areas clean and organized. People using common areas such as lunchrooms, locker rooms, and restrooms are expected to keep them sanitary. Please clean up after meals and dispose of trash properly.

## **Off-Duty Use of Facilities**

Employees are prohibited from remaining on the District premises or making use of District facilities while not on duty. Employees are expressly prohibited from using District facilities, District property, or District equipment for personal use. This policy is not intended to limit the ability of employees to use the District's email systems to communicate with other employees regarding the terms and conditions of their employment during non-working times, including such topics as wages, job performance, workload, or staffing.

## **Smoking**

Smoking is prohibited at this workplace. The smoking prohibition applies to all smoking devices, including, but not limited to, the use of electronic smoking devices, such as electronic cigarettes, pipes, hookahs, and vaping devices.

## **Solicitation and Distribution of Literature**

In order to ensure efficient operation of the District's business and to prevent disruption to employees, we have established control of solicitations and distribution of literature on District property. The District has enacted rules applicable to all employees governing solicitation, distribution of written material, and entry onto the premises and work areas. All employees are expected to comply strictly with these rules. Any employee who is in doubt concerning the application of these rules should consult with their supervisor.

No employee shall solicit or promote support for any cause or organization during their working time or during the working time of the employee or employees at whom such activity is directed. No employee shall distribute or circulate any written or printed material in work areas at any time, or during their working time or during the working time of the employee or employees at whom such activity is directed.

Under no circumstances will non-employees be permitted to solicit or to distribute written material for any purpose on District property.



## Employee Conduct

### Business Conduct and Ethics

No employee may accept a gift or gratuity from any customer, vendor, supplier, or other person doing business with the District because doing so may give the appearance of influencing business decisions, transactions or service. Please discuss expenses paid by such persons for business meals or trips with the District in advance.

### Conducting Personal Business

Employees are to conduct only District business while at work. Employees may not conduct personal business or business for another employer during their scheduled working hours.

### Confidential Information

***Each employee is responsible for safeguarding the confidential information obtained during employment.***

In the course of your work, you may have access to trade secrets or similarly protected proprietary or confidential information regarding the District business (such as, research and development, business plans, or strategies). You have a responsibility to prevent revealing or divulging any such information unless it is necessary for you to do so in the performance of your duties or as required by law.

Access to, or disclosure of, confidential information should be on a "need-to-know" basis and must be authorized by your supervisor. Any breach of this policy will not be tolerated, and legal action may be taken by the District.

This policy does not prohibit employees from confidentially disclosing trade secret, proprietary or confidential information to federal, state and local government officials, or to an attorney, when done to report or investigate a suspected violation of the law. Employees may also disclose the information in certain court proceedings if specific procedures to protect the information are followed. Nothing in this policy is intended to conflict with 18 U.S.C. sec. 1833(b) or create liability for disclosures of trade secrets that are expressly allowed by 18 U.S.C. sec. 1833(b).

### Social Media Acceptable Use

The District encourages employees to share information with coworkers and with those outside the company for the purposes of gathering information, generating new ideas, and learning from the work of others. Social media provides inexpensive, informal, and timely ways to participate in an exchange of ideas and information. However, information posted on a website is available to the public, and therefore, the District has established the following guidelines for employee participation in social media.

**Note:** As used in this policy, "social media" refers to blogs, forums, and social networking

sites, such as Twitter (X), Facebook, LinkedIn, YouTube, Instagram, and Snapchat, among others.

**Off-duty use of social media.** Employees may maintain personal websites or weblogs on their own time using their own facilities. Employees must ensure that social media activity does not interfere with their work. In general, the District considers social media activities to be personal endeavors, and employees may use them to express their thoughts or promote their ideas. In addition, employees may not post on a personal blog or webpage or participate on a social networking platform for personal purposes during work time or at any time with District equipment or property.

**On-duty use of social media.** Employees may engage in social media activity during work time provided it is directly related to their work and approved by their supervisor and does not identify or reference company clients, customers, or vendors without express permission. The District monitors employee use of District computers and the Internet, including employee blogging and social networking activity.

**Respect.** Demonstrate respect for the dignity of the District, its community members, its vendors, and its employees. A social media site is a public place, and employees should avoid inappropriate comments. For example, employees should not divulge District confidential information such as trade secrets, client lists, or information restricted from disclosure by law on social media sites. Similarly, employees should not engage in harassing or discriminatory behavior that targets other employees or individuals because of their protected class status or make defamatory comments or engage in other behavior that violates the District's policies.

**Post disclaimers.** Employees who identify themselves as District employees or discuss matters related to the District on a social media site must include a disclaimer on the front page stating that it does not express the views of the District and that the employees are expressing only personal views—for example: “The views expressed on this website/blog are mine alone and do not necessarily reflect the views of my employer.” Place the disclaimer in a prominent position and repeat it for each posting expressing an opinion related to the District or the District's business. Employees must keep in mind that if they post information on a social media site that is in violation of District policy and/or federal, state, or local law, the disclaimer will not shield them from disciplinary action.

**Confidentiality.** Employees should not identify or reference District clients, customers, or vendors without express permission. Employees may write about their jobs in general but may not disclose any confidential or proprietary information. For examples of confidential information, employees should refer to the confidentiality policy. When in doubt, ask before publishing.

**Trademarks and copyrights.** Employees should not use the District's or others' trademarks on a social media site or reproduce the District's or others' material without first obtaining permission.

**Legal.** Employees are expected to comply with all applicable laws, including, but not limited to, Federal Trade Commission (FTC) guidelines and copyright, trademark, and harassment laws.

**Discipline.** Violations of this policy may result in discipline up to and including immediate termination of employment.

Nothing in this policy is meant to, nor should it be interpreted to, in any way limit employees' rights under any applicable federal, state, or local laws, including rights under the NLRA to engage in protected concerted activities with other employees to improve or discuss terms and conditions of employment, such as wages, working conditions, and benefits. Employees have the right to engage in or refrain from such activities.

### Conflicts of Interest

All employees must avoid situations involving actual conflict of interest. Personal or romantic involvement with a competitor, supplier, or subordinate employee of the District, which impairs an employee's ability to exercise good judgment on behalf of the District, can create an actual conflict of interest. Supervisor-subordinate romantic or personal relationships also can lead to supervisory problems, possible claims of sexual harassment, and morale problems.

An employee involved in any of the types of relationships or situations described in this policy should immediately and fully disclose the relevant circumstances to their immediate supervisor, or any other appropriate supervisor, for a determination about whether an actual conflict exists. If an actual conflict is determined, the District may take whatever corrective action appears appropriate according to the circumstances. Failure to disclose facts shall constitute grounds for disciplinary action.

### Dress Codes and Other Personal Standards

Employees are expected to wear clothing appropriate for the nature of our business and the type of work performed. Avoid clothing that can create a safety hazard.

The District observes a casual dress day on Fridays. Some employees who have customer contact may not be permitted to participate in the casual dress day.

Employees who do participate in a casual dress day still are expected to report to work properly groomed. Acceptable casual dress excludes ripped or torn clothing, T-shirts of any kind (with or without a written message), tennis shoes, and tank or halter tops.

This dress code policy will not be enforced in a manner that discriminates against anyone based on a protected class, such as race, sex, gender identity or gender expression, religion, national origin, or any other class protected by federal, state, or local law. For more information, see the Harassment, Discrimination and Retaliation Prevention policy. Employees who need a reasonable accommodation because of religious beliefs, observances, or practices should contact a District representative with day-to-day personnel responsibility and discuss the need for accommodation.

## Fitness Equipment

While the District encourages employees to engage in physical fitness, fitness equipment that is owned and brought to the District by employees can create a workplace risk. Therefore, any physical fitness activities an employee engages, while using their own equipment while on District property is assumed to be under the employee's own risk. The District will require a Fitness Equipment Waiver and Release of Liability be signed by all employees.

## Drug and Alcohol Abuse

The District is concerned about the use of alcohol, marijuana, illegal drugs, or controlled substances as it affects the workplace. Use of these substances, whether on or off the job, can detract from an employee's work performance, efficiency, safety, and health, and seriously impair District operations. In addition, the use or possession of these substances on the job constitutes a potential danger to the welfare and safety of other employees and exposes the District to the risks of property loss or damage, or injury to other persons.

The following rules and standards of conduct apply to all employees while on District property, at work or working on District business. The following are strictly prohibited by District policy:

- Being under the influence of, or impaired by, an illegal or controlled substance, alcohol, or marijuana while on the job.
- Using or possessing illegal or controlled substances, alcohol, or marijuana while on the job (including the illegal use of prescription drugs and possessing drug paraphernalia).
- Distributing, selling, or purchasing of an illegal or controlled substance, alcohol, or marijuana while on the job.

Violation of these rules and standards of conduct will not be tolerated. The District also may bring the matter to the attention of appropriate law enforcement authorities.

In order to enforce this policy, the District reserves the right to conduct searches of District property or employees and/or their personal property, and to implement other measures necessary to deter and detect abuse of this policy.

An employee's conviction on a charge of illegal sale or possession of any controlled substance while off District property will not be tolerated because such conduct, even though off duty, reflects adversely on the District. In addition, the District must keep people who sell or possess controlled substances off District premises in order to keep the controlled substances themselves off the premises.

The District will encourage and reasonably accommodate employees with alcohol, marijuana or drug dependencies to seek treatment and/or rehabilitation. Employees desiring such assistance should request a treatment or rehabilitation leave. The District is not obligated, however, to continue to employ any person whose performance of essential job duties is impaired because of drug, alcohol or marijuana use. Additionally, employees who are given the opportunity to seek treatment and/or rehabilitation, but fail to successfully overcome their dependency or problem, will not automatically be reemployed or be given a second opportunity to seek treatment and/or rehabilitation. This policy on treatment and rehabilitation is not intended to affect the District's

treatment of employees who violate the regulations described previously. Rather, rehabilitation is an option for an employee who acknowledges a chemical dependency and voluntarily seeks treatment to end that dependency.

## **News Media Contacts**

Employees may be approached for interviews or comments by the news media. Only contact people designated by the CEO may comment to news reporters on District policy or events relevant to the District.

This policy does not limit your right to discuss the terms and conditions of his or her employment, or to try and improve these conditions.

## **Other Employment**

While employed by the District, employees are expected to devote their energies to their jobs with the District.

Employment that directly conflicts with the District's essential business interests and disrupts business operations is strictly prohibited.

If you wish to engage in additional employment that may create a real conflict of interest, you must submit a written request to the District explaining the details of the additional employment. If the additional employment is authorized, the District assumes no responsibility for it. The District shall not provide workers' compensation coverage or any other benefit for injuries occurring from or arising out of additional employment. Authorization to engage in additional employment can be revoked at any time.

## **Prohibited Conduct**

Employees are expected to conduct themselves in a manner to further the District's objectives. The following conduct is prohibited and will not be tolerated by the District. This list of prohibited conducts is illustrative only; other types of conduct that threaten security, personal safety, employee welfare, and District operations also may be prohibited and will result in disciplinary action up to and including termination.

- Falsifying employment records, employment information, or other District records;
- Inefficient or careless performance of job responsibilities or inability to perform job duties satisfactorily;
- Recording the work time of another employee or allowing any other employee to record your work time, or falsifying any time card, either your own or another employee's;
- Theft and deliberate or careless damage or destruction of any District property, or the property of any employee or customer;
- Removing or borrowing District property without prior authorization;
- Unauthorized use or misuse of District equipment, time, materials, or facilities;
- Provoking a fight or fighting during working hours or on District property;
- Participating in horseplay or practical jokes on District time or on District premises;

- Carrying firearms or any other dangerous weapons on District premises at any time;
- Causing, creating or participating in a disruption of any kind during working hours on District property;
- Insubordination, including but not limited to failure or refusal to obey the orders or instructions of a supervisor or member of management, or the use of abusive or threatening language toward a supervisor or member of management;
- Using abusive, threatening or intimidating language at any time on District premises;
- Violation of District punctuality and attendance policies. Absences protected by state or federal law do not count as violations of this policy. Protected paid sick time under California law does not count as a violation of this policy;
- Failing to obtain permission to leave work for any reason during normal working hours, not including meal periods;
- Failing to observe working schedules, including rest and meal periods;
- Sleeping or malingering on the job;
- Making or accepting personal telephone calls, including cell phone calls, of more than three minutes in duration during working hours, except in cases of emergency or extreme circumstances;
- Working overtime without authorization or refusing to work assigned overtime;
- Violation of dress standards;
- Violation of any safety, health, security or District policy, rule or procedure;
- Violation of the District's drug and alcohol policy;
- Committing a fraudulent act or a breach of trust under any circumstances;
- Violating the District's anti-harassment or equal employment opportunity policies; and
- Failing to promptly report work-related injury or illness.

This statement of prohibited conduct does not alter the District's policy of at-will employment. Either you or the District remain free to terminate the employment relationship at any time, with or without reason or advance notice.

### **Prohibited Use of Cell Phone While Driving**

In the interest of the safety of our employees and other drivers and pedestrians on the road, the District employees are prohibited from using cell phones (including all smart phones) or other wireless communication devices (including laptops and tablets) while driving on District business and/or District time. This prohibition includes any use of the cell phone or other wireless communications device, such as answering or placing calls, engaging in conversations, texting, web browsing or using any smart phone application while driving.

If your job requires that you keep your cell phone or other wireless communication device turned on while you are driving, you must use a hands-free, voice-operated device at all times. Under no circumstances should employees place phone calls while operating a motor vehicle while driving on District business and/or District time. Violating this policy is a violation of law and a violation of District rules.

## Punctuality and Attendance

As an employee of the District, you are expected to be punctual and regular in attendance. Tardiness or absences can cause problems for your co-workers and your supervisor. When you are absent, your assigned work must be performed by others.

You are expected to report to work as scheduled, on time, and prepared to start work. Employees also are expected to remain at work for their entire work schedule, except for meal periods or when required to leave on authorized District business. Late arrivals, early departures or other unanticipated and unapproved absences from scheduled hours are disruptive and must be avoided.

If you are unable to report for work on any particular day, you must provide reasonable advance notice to your supervisor before the time you are scheduled to begin working for that day. You must inform your supervisor of the expected duration of any absence. If you fail to provide reasonable advance notice before your scheduled time to begin work and do not arrive in time for your assigned shift, you will be considered tardy for that day. If the circumstances for your tardiness or absence were unforeseen, inform your supervisor as soon as practical of the reason for the tardiness or absence.

Excessive absenteeism or tardiness, providing false information or abuse of leave laws will not be tolerated. Generally, if you fail to report for work without any notification to your supervisor and your absence continues for a period of three (3) calendar days, the District will consider that you have voluntarily abandoned or quit your employment.

***Absences protected by local, state and federal law do not count as a violation of the punctuality and attendance policy. Paid sick time protected under California law does not count as a violation of this policy.***

## Wages

### Advances

The District does not permit advances against paychecks or against unaccrued vacation.

### Expense Accounts

The District reimburses employees for business expenses.. Employees who have expense accounts or who have incurred business expenses must submit required receipts to the CEO no later than 30 days after expense was incurred..

If you have any questions about the District's expense reimbursement policy, contact the CEO.

Personal and/or vacation travel may be combined with business travel provided there is no additional cost to the District, and it meets with the approval of the CEO. District credit cards are not to be used for personal expenses.

### Makeup Time

The District allows the use of makeup time when non-exempt employees need time off to tend to personal obligations. Makeup time worked will not be paid at an overtime rate. Employees may take time off and then make up the time later in the same workweek, or may work extra hours earlier in the workweek to make up for time that will be taken off later in the workweek.

Makeup time requests must be submitted in writing to the CEO, with your signature, on the District-provided form. Requests will be considered for approval based on the legitimate business needs of the District at the time the request is submitted. A separate written request is required for each occasion the employee requests makeup time.

If you request time off that you will make up later in the week, you must submit your request at least twelve (12) hours before the desired time off in advance of the desired time off. If you request to work makeup time first in order to take time off later in the week, you must submit your request at least six (6) hours before working the make-up time. Your makeup time request must be approved in writing before you take the requested time off or work makeup time, whichever is first.

All makeup time must be worked in the same workweek as the time taken off. The District's seven day workweek is from 9:00 am Monday to 9:00 am Sunday. Nonexempt employees may not work more than eleven (11) hours in a day as a result of making up time that was or would be lost due to a personal obligation.

If you take time off and are unable to work the scheduled makeup time for any reason, the hours missed will normally be unpaid. However, the CEO may arrange with you another day to make up the time if possible, based on scheduling needs. If you work makeup time in advance of time you plan to take off, you must take that time off, even if you no longer need the time off for any reason.



An employee's use of makeup time is completely voluntary. The District does not encourage, discourage, or solicit the use of makeup time.

## **Meal and Rest Periods**

### **Rest Breaks**

All nonexempt employees are entitled to uninterrupted rest break periods during their workday. If you are a nonexempt employee, you will be paid for all such break periods, and you will not clock out.

#### **Number of Rest Breaks**

You will be authorized and permitted one (1) 10-minute net rest break for every four (4) hours you work (or major fraction thereof, which is defined as any amount of time over two [2] hours). A rest break need not be authorized for employees whose total daily work time is less than three and one half (3.5) hours.

You will be relieved of all duty during your rest break periods. You are free to come and go as you please and are free to leave the premises. You are expected to return to work promptly at the end of any rest break.

If you work a shift from three and one-half (3.5) to six (6) hours in length you will be entitled to one (1) ten-minute rest break. If you work more than six (6) hours and up to 10 hours, you will be entitled to two (2) ten-minute rest breaks. If you work more than 10 hours and up to 14 hours, you will be entitled to three (3) ten-minute rest breaks.

#### **Timing of Rest Breaks**

You are authorized and permitted to take a rest break in the middle of each four-hour work period. Your rest break will be scheduled by supervisors.

### **Meal Periods**

All nonexempt employees will be provided an uninterrupted unpaid meal period of at least 30 minutes if you work more than five (5) hours in a workday. You must clock out for your meal period; however, the meal period is considered duty-free and is paid as part of your regular workday. You will be permitted a reasonable opportunity to take this meal period, and you will be relieved of all duty. During your meal period, you are free to come and go as you please and are free to leave the premises. You are expected to return to work promptly at the end of any meal period.

If your total work period for the day is more than five (5) hours per day but no more than six (6) hours, you may waive the meal period. This cannot be done without the mutual consent of you and your supervisor. You must discuss any such waiver with your supervisor in advance. The waiver must be in writing.

### **Timing of Meal Period**

Your meal period will be provided no later than the end of your fifth (5<sup>th</sup>) hour of work. For example, if you begin work at 9:00 a.m., you must start your meal period by 1:59 p.m. (which is before the end of your fifth hour of work). Your meal period will be scheduled by the CEO.

### **Second Meal Period**

If you work more than ten (10) hours in a day, you will be provided a second, unpaid meal period of at least thirty (30) minutes. You will be permitted a reasonable opportunity to take this meal period, and you will be relieved of all duty. There will be no control over your activities during your meal period. During your meal period, you are free to leave the premises and are free to come and go as you please. You are expected to return to work promptly at the end of any meal period.

Depending on the circumstances, you may be able to waive your second meal period if you took the first meal period and if your total hours worked for the day is no more than twelve hours. This cannot be done without the mutual consent of you and the CEO and must be in writing. You must discuss any such waiver with your supervisor in advance.

### **Timing of Second Meal Period**

This second meal period will be provided no later than the end of your tenth (10<sup>th</sup>) hour of work. Your second meal period will be scheduled by supervisors.

### **Recording Meal Periods**

You must clock out for any meal period and record the start and end of the meal period. Employees are not allowed to work "off the clock." All work time must be accurately reported on your time record.

If, for any reason you are not provided a meal period in accordance with our policy, or if you are in any way discouraged or impeded from taking your meal period or from taking the full amount of time allotted to you, please immediately notify the CEO.

Anytime you miss a meal period that was provided to you (or you work any portion of a provided meal period), you will be required to report to the CEO and document the reason for the missed meal period, or time worked.

Please also refer to the District's Timekeeping Policy.

### **Overtime for Nonexempt Employees**

Employees may be required to work overtime as necessary. Only actual hours worked in a given workday or workweek can apply in calculating overtime. The District will attempt to distribute overtime evenly and accommodate individual schedules. All overtime work must be previously authorized by a supervisor.

The District provides compensation for all overtime hours worked by non-exempt employees in accordance with state and federal law as follows:

- All hours worked in excess of 40 hours in one workweek will be treated as overtime. A workday normally begins at 9:00 a.m. and ends 24 hours later. Workweeks begin each Monday at 9:00 a.m. There may be times when the CEO will schedule the start of the workday later in the day to accommodate your participation in Board meetings.
- Compensation for hours in excess of 8 hours a day or 40 for the workweek, shall be paid at a rate one and one-half times the employee's regular rate of pay.

## **Bilingual Pay**

Being able to communicate and conduct business effectively in more than one language is a skill that merits economic rewards. The purpose of this pay is to provide service to the residents of Fallbrook, Bonsall, Rainbow, and De Luz. Designation of bilingual required positions is the sole prerogative of the CEO and is based on operational and staffing needs of the District.

Positions eligible to receive bilingual English/Spanish incentive pay must meet specific criteria.

Definition of Designated Positions:

- Public contact with regular and frequent use of bilingual skills;
- Position performs in a setting where there is a demonstrated public need for the designation;
- Bilingual skills are necessary to provide essential services and for the successful performance of official functions;
- Bilingual skills are an essential element of job duties.

Employees receiving bilingual pay are expected to translate for employees who are not bilingual in the event such services are needed. Employees receiving bilingual pay may be required to report to work during nonscheduled working hours and will have a role in disaster recovery efforts and will be expected to work during periods of emergency response by the District.

In the event that an employee moves to a position that is not designated as bilingual or if the bilingual designation of a position is removed, the bilingual pay will cease. Positions which already reflect that bilingual use is compensated by other means, including reduction in job duties, may not be eligible for incentive pay.

Employees who are determined to qualify for bilingual incentive pay as outlined above will receive three percent (3%) additional pay. Pay will begin the first of the month following demonstration of both oral and written proficiency.

## **Pay for Mandatory Meetings/Training**

The District will pay non-exempt employees for their attendance at meetings, lectures, and training programs under the following conditions:

- Attendance is mandatory;

- The meeting, course, or lecture is directly related to the employee's job;
- The employee who is required to attend such meetings, lectures, or training programs will be notified of the necessity for such attendance by their supervisor;
- The employee will be paid at the then applicable minimum wage for time spent at meetings, lectures, and training programs if the employee does not perform any productive work during such attendance;
- Employees who do perform productive work during attendance at meetings, lectures, or training programs will be compensated at their regular rate of pay; and
- Any hours in excess of eight in a day or 40 in a week will be paid at the appropriate overtime rate, at the hourly rate in effect at the time the overtime work is being performed.

## Payment of Wages

FRHD takes all reasonable steps to ensure that employees receive the correct amount of pay in each paycheck. Employees must verify that their paychecks are correct every pay day. Paychecks are normally paid through direct deposit. If you observe an error on your check, please report it immediately to the Chief Administrative Officer.

All employees of the District are paid on the 5<sup>th</sup> and 20<sup>th</sup> of each month for work performed during the previous two-week pay period. If a regular payday falls on a weekend or holiday, you will be paid on the previous workday.

The District offers automatic payroll deposit. You may begin and stop automatic payroll deposit at any time. To begin automatic payroll deposit, you must complete a form (available from the payroll department) and return it to payroll at least ten (10) days before the pay period for which you would like the service to begin. You should carefully monitor your payroll deposit statements for the first two pay periods after the service begins.

To stop automatic payroll deposit, complete the form available from the Chief Administrative Officer and return it to payroll at least ten (10) days before the pay period for which you would like the service to end. You will receive a regular payroll check on the first pay period after the receipt of the form, provided it is received no later than ten (10) days before the end of the pay period.

## Timekeeping Requirements

All nonexempt employees are required to use a timesheet to record time worked for payroll purposes. All time worked must be accurately reported on your time record. You must record your own time at the start and at the end of each work period. You must record the start and end of the meal period.

You are not allowed to work "off the clock." Working off the clock violates District policy. Any work performed before or after a regularly scheduled shift must be approved in advance by your supervisor. If you perform any off-the-clock work, please report the work to your supervisor.

You also must record your time whenever you leave the building for any reason other than District business.

You will be required to certify that your time record is accurate.

Any handwritten marks or changes on the timesheet must be initialed by a supervisor. Filling in another employee's timesheet, allowing another employee to fill out your timesheet, or altering a timesheet is not permissible and is subject to disciplinary action.

Any errors on your timecard should be reported immediately to your supervisor.

Please also refer to the District's Meal and Rest Break Policy.

## **Reporting-Time Pay**

The District will comply with all applicable regulations regarding reporting-time pay for nonexempt employees.

## **Work Schedule**

All employees are expected to be at their desks or workstations at the start of their scheduled shifts, ready to work. Work schedules may vary depending on assigned role.

### **Holiday Time**

All Full-time employees will be paid at an eight (8) hour rate.

### **Overtime**

For non-exempt employees overtime worked on any regularly scheduled workday will be paid at the rate of:

- Time-and-one-half for all work performed beyond 8 hours in a day or forty (40) hours per week.
- Any seventh consecutive workday will be paid at the rate of time-and-one-half.

### **Sick and Vacation Time**

For employees working an eight (8) hour day, when absent for a full day, accrued sick or vacation time will be deducted in eight (8) hour increments. Otherwise, sick and vacation time may be taken in thirty (30) minute increments.

## Safety and Health

### Employees Who Are Required to Drive

Employees whose job duties require them to drive their own vehicles for District business will be required to show proof of current valid driving licenses and proof of insurability under the District's policy or current effective insurance coverage before the first day of employment.

The District participates in a system that regularly checks state Department of Motor Vehicles (DMV) records of all employees who are required to drive as part of their job.

If an employee is required to drive as part of their job, the District retains the right to transfer to an alternative position, suspend, or terminate an employee whose license is suspended or revoked, or who fails to maintain personal automobile insurance coverage or who is uninsurable under the District's policy.

Employees who drive their own vehicles on District business will be reimbursed at the rate of the IRS standard mileage rate per mile.

### Ergonomics

The District is subject to Cal/OSHA ergonomics standards for minimizing workplace repetitive motion injuries. The District will make necessary adjustments to reduce exposure to ergonomic hazards through modifications to equipment and processes and employee training. The District encourages safe and proper work procedures and requires all employees to follow safety instructions and guidelines.

The District believes that reduction of ergonomic risk is instrumental in maintaining an environment of personal safety and well-being, and is essential to our business. We intend to provide appropriate resources to create a risk-free environment. If you have any questions about ergonomics, please contact the CEO.

### Health and Safety

All employees are responsible for their own safety, as well as that of others in the workplace. To help us maintain a safe workplace, everyone must be safety conscious at all times. Report all work-related injuries or illnesses immediately to your supervisor or to the human resources department. In compliance with California law, and to promote the concept of a safe workplace, the District maintains an Injury and Illness Prevention Program. The Injury and Illness Prevention Program is available for review by employees and/or employee representatives in the CEO's office.

In compliance with Proposition 65, the District will inform employees of any known exposure to a chemical known to cause cancer or reproductive toxicity.

### Medical Testing

The District is committed to providing a safe work environment for all employees. There may be circumstances during a declared health emergency when business necessity requires that the

District conduct medical testing or temperature checks of employees. Any such tests will be conducted in conformance with all Federal and State laws and local health department regulations.

## Recreational Activities and Programs

The District or its insurer will not be liable for payment of workers' compensation benefits for any injury that arises out of an employee's voluntary participation in any off-duty recreational, social, or athletic activity that is not part of the employee's work-related duties.

## Security

The District has developed guidelines to help maintain a secure workplace.

- Be aware of persons loitering for no apparent reason in parking areas, walkways, entrances and exits, and service areas.
- Report any suspicious persons or activities to security personnel. Secure your desk or office at the end of the day.
- When called away from your work area for an extended length of time, do not leave valuable and/or personal articles in or around your workstation that may be accessible.

The security of facilities as well as the welfare of our employees depends upon the alertness and sensitivity of every individual to potential security risks. You should immediately notify your supervisor when unknown persons are acting in a suspicious manner in or around the facilities, or when keys, security passes, or identification badges are missing.

## Workplace Violence

The District has adopted the following workplace violence policy to ensure a safe working environment for all employees. The Fallbrook Regional Health District is committed to providing a work environment that is free of disruptive, threatening, or violent behavior involving any employee, appointed or elected official, volunteer, contractor, client, or visitor. Our policy is to establish, implement, and maintain an effective Workplace Violence Prevention Plan (Plan) that addresses the hazards known to be associated with four types of workplace violence as defined by Labor Code Section [6501.9](#). Our written Plan is located at the Administrative Office: 138 S. Brandon Rd., Fallbrook, CA 92028.

The following employers, employees, and places of employment are exempt from these requirements:

- Employees teleworking from a location of the employee's choice, which is not under the control of the employer.

The District has zero tolerance for acts of violence and threats of violence. Without exception, acts and threats of violence are not permitted. All such acts and threats, even those made in apparent jest, will be taken seriously, and will lead to discipline up to and including termination.

Possession of non-work-related weapons on District premises and at District-sponsored events shall constitute a threat of violence.

It is every employee's responsibility to assist in establishing and maintaining a violence-free work environment. Therefore, you are expected and encouraged to report any incident which may be threatening to you or your co-workers or any event which you reasonably believe is threatening or violent.

The District has implemented a workplace violence prevention plan that all employees will be trained to use and understand. This prevention plan is part of the employee's onboarding.



## **Termination**

### **Employee References**

All requests for references must be directed to the CEO. No other manager or employee is authorized to release references for current or former employees.

By policy, the District discloses only the dates of employment and the title of the last position held of former employees.

### **Progressive Discipline and Involuntary Termination**

Violation of District policies and rules may warrant disciplinary action. The District has a system of progressive discipline that may include verbal warnings, written warnings, and suspension. The system is not formal, and the District may, in its sole discretion, utilize whatever form of discipline is deemed appropriate under the circumstances, up to, and including, immediate termination of employment. The District's policy of progressive discipline in no way limits or alters the at-will employment relationship.

### **Reductions in Force**

Under some circumstances, the District may need to restructure or reduce its workforce. If restructuring our operations or reducing the number of employees becomes necessary, the District will attempt to provide advance notice, if possible, to help prepare affected individuals. If possible, employees subject to layoff will be informed of the nature of the layoff and the foreseeable duration of the layoff, whether short-term or indefinite.

In determining which employees will be subject to layoff, the District will take into account, among other things, operation and requirements, the skill, productivity, ability, and past performance of those involved, and also, when feasible, the employee's length of service.

### **Voluntary Resignation**

Voluntary resignation results when an employee voluntarily quits their employment at Fallbrook Regional Health District or fails to report to work for three consecutively scheduled workdays without notice to, or approval by, their supervisor (unless the absence is protected by law). All District-owned property, including vehicles, keys, uniforms, identification badges, and credit cards, must be returned immediately upon termination of employment.



**Receipt  
2024 Employee Handbook**

Employee Name	
---------------	--

My signature indicates that I have received a copy of the Fallbrook Regional Health District Handbook.

I understand that I am to review this handbook that outlines my privileges and benefits, as well as my responsibilities and obligations as an employee of the Fallbrook Regional Health District (the "District").

I understand that the information contained in this handbook dated August 2024 is subject to change, and that the District may modify or supersede the policies and benefits as stated in this handbook, and that any such changes will be reflected in memorandum or notices circulated to District employees.

I understand that nothing in this handbook, or any other policy of the District, creates a term and/or contract of employment. I further understand and agree that no contract of employment other than "at will" has been expressed or implied, and that no circumstance arising out of my employment will alter the "at will nature" of the employment relationship.

--	--

**Employee Signature**

**Date**

## Organization Information

### Legal Name

Michelle's Place Cancer Resource Center

### DBA (if Applicable)

n/a

## Program Name/Title

Mental Health for Cancer Patients

## Brief Program Description

Mental Health for cancer patients provides much needed one on one counseling for cancer patients and their families who are in need of qualified mental health resources stemming from their cancer diagnosis. This program is available for private sessions for the patient and family members.

## Funding Amount Awarded

27234

## Target Population - Age

	Percent of program participants for the full grant cycle	Total number of participants
Children (infants to 12)		
Young Adults (13-17)		
Adults (18-60)	98	41
Seniors (60+)	2	6
We do not collect this data (indicate with 100%)*		

## Target Population not collected - Age

n/a

## Target Population - Gender

	Final percent of program participants
Female	100
Male	
Non-binary	
Unknown*	

## \*Target Population - Gender

n/a

## Target Population - Income Level

	Percent of program participants
Extremely Low-Income Limits, ceiling of \$32,100	1
Very Low (50%) Income Limits, ceiling of \$53,500	35
Low (80%) Income Limits, ceiling of \$85,600	64
Higher Than Listed Limits	
We do not collect this data (indicate with 100%)*	

## \*Target Population - Income Level

n/a

## Program/Services Description - Social Determinants of Health

Healthcare Access & Quality (Access to Health Care, Access to Primary Care, Health Literacy)

## Program Goal & Objectives

The program goal is to provide at least 20 families dealing with cancer with mental health resources to help them in their cancer journey.

The program objective is to provide 20 families in the FRHD with one on one counseling services within 12 months.

## Program Outcomes & Measurables

This program has exceeded our expectations and goals. Families from the FRHD received one on one counseling and mental health resources. Our goal was to help 20 families. This program served 47 families. We more than doubled the goal. The need for mental health resources is significant. We are grateful for the support of the FRHD grant funding to ensure that residents received the support they need.

## Anticipated Acknowledgment

Social Media Postings

Signage at Service Sites

Print Materials to Service Recipients

Website Display

## Terms and Conditions

Accepted

## Authorized Signature



## Contact Information

### Contact Name

Kim Gerrish

### Title

Executive Director

### Primary Contact Phone

9516995455

### Email Address

kim@michellesplace.org

## Writing Instructions:

What language(s) did this program accommodate:

English

Spanish

## Acknowledgment of District Support

**Michelle's Place  
Cancer Support Circle**  
Cancer Support Groups Available



Michelle's Place Cancer Support Circle invites you to join us to share your experience, ask questions, to give and receive support of friends and people from your community, that share in similar experiences.

**Meeting in Building C**

**The second (2nd) Wednesday of each month.**

**For more information please visit [www.MichellesPlace.org](http://www.MichellesPlace.org)**

Made possible through



[www.fallbrookhealth.org](http://www.fallbrookhealth.org)

1636 East Mission Rd. Fallbrook, CA 92028

## Acknowledgment of District Support

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Cancer Support Circle**  
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Made possible through



[www.fallbrookhealth.org](http://www.fallbrookhealth.org)

1636 East Mission Rd. Fallbrook, CA 92028

## Impact Story



Impact story for FRHD 4th ... .docx

## Impact Story



Impact story for FRHD 4th ... .docx

## Program Budget



23\_24 FRHD CHC Mental He... .xlsx

**Actual number of residents that directly benefited (participant/client) from this program during the entire grant cycle.**

47





On May 28th, Michelle's Place partnered with Dream Dinners to hold a "Spice it Up" date night. Six couples were invited to learn how to make simple, nutritious meals for each other while the Behavioral Health Team led a conversation on maintaining intimacy in a relationship after cancer. One couple that attended were Fallbrook residents. Heather H reported, "Michelle's Place hosted a Date Night at Dream Dinners in Temecula, and it was a blessing to be included. My husband has not been active with Michelle's Place, as it has always been a place for me to get support, be active in art classes, and make friends going through the same challenges that I am. This time he was able to be involved and meet other spouses. Michelle's Place has and always does go above and beyond for their clients."

Agency Name: **Michelle's Place Cancer Resource Center** PROGRAM NAME: **Mental Health for Cancer Patients**

The main categories align with the budget submitted with your application. Aggregate totals are all that should be reported under each heading.

1)	<b>A</b>	<b>INDIRECT EXPENSES:</b>	PROGRAM COST	REQUESTED FROM FRHD	AMOUNT USED Q1	AMOUNT USED Q2	AMOUNT USED Q3	AMOUNT USED Q4
		TOTAL INDIRECT EXPENSE	\$14,800.00	\$4,672.00	\$1,168.00	\$2,900.00	\$332.00	\$272.00
	<b>B</b>	<b>PERSONNEL EXPENSES - PROGRAM SPECIFIC</b>	PROGRAM COST	REQUESTED FROM FRHD	AMOUNT USED Q1	AMOUNT USED Q2	AMOUNT USED Q3	AMOUNT USED Q4
		TOTAL PERSONNEL EXPENSE	\$128,215.00	\$18,662.00	\$1,866.00	\$6,000.00	\$6,000.00	\$4,800.00
	<b>C</b>	<b>DIRECT PROGRAM EXPENSES</b>	PROGRAM COST	REQUESTED FROM FRHD	AMOUNT USED Q1	AMOUNT USED Q2	AMOUNT USED Q3	AMOUNT USED Q4
		TOTAL OTHER EXPENSES	\$20,600.00	\$3,900.00	\$1,900.00	\$825.00	\$862.00	\$315.00
	<b>D</b>	<b>TOTALS</b>	PROGRAM COST	FRHD Funds Awarded	Total Amount Q1	Total Amount Q2	Total Amount Q3	Total Amount Q4
			\$163,615.00	\$27,234.00	\$4,934.00	\$9,725.00	\$7,194.00	\$5,387.00

Total funds expended to date: **\$27,240.00**

## Organization Information

### Legal Name

Fallbrook Senior Citizens Service Club, Inc

### DBA (if Applicable)

Fallbrook Senior Center

## Program Name/Title

Congregate Meal Program

## Brief Program Description

The Fallbrook Senior Center offers congregate meals to foster the well-being of older adults by supporting healthy aging, ensuring proper nutrition, and encouraging social interaction. Additionally, we organize health-focused trainings and entertaining events with music to promote socialization and enjoyment.

## Funding Amount Awarded

47000

## Target Population - Age

	Percent of program participants for the full grant cycle	Total number of participants
Children (infants to 12)		
Young Adults (13-17)		
Adults (18-60)	1	6
Seniors (60+)	99	159
We do not collect this data (indicate with 100%)*		

## Target Population - Gender

	Final percent of program participants
Female	64
Male	36
Non-binary	
Unknown*	

## Target Population - Income Level

	Percent of program participants
Extremely Low-Income Limits, ceiling of \$32,100	
Very Low (50%) Income Limits, ceiling of \$53,500	

	Percent of program participants
Low (80%) Income Limits, ceiling of \$85,600	
Higher Than Listed Limits	
We do not collect this data (indicate with 100%)*	100

### \*Target Population - Income Level

We do ask the question, however there is a decline to state box on the form. Everyone has selected the decline to state box.

### Program/Services Description - Social Determinants of Health

Economic Stability (Employment, Food Insecurity, Housing Instability, Poverty)

Neighborhood & Built Environment (Access to Foods that Support Healthy Eating Patterns, Crime and Violence, Environmental Conditions, Quality of Housing)

### Program Goal & Objectives

Through the Congregate Meal Program, the Fallbrook Senior Center strives to reach as many adults as possible aged 50 and over to help alleviate food insecurity and isolation. The goal of the Senior Center is to provide meals with high nutritional value in a social setting with a minimal cost of \$5.00 for those 50 and above residing in the communities of Fallbrook, Bonsall, Rainbow and De Luz. Through social media, flyers, newsletters, and special events we continue to create greater awareness of the program and thereby attract more seniors who could benefit from participation in the program. The benefits include healthy aging, improved quality of life through good nutrition, and the ability to remain in their homes as long as is safely possible.

### Program Outcomes & Measurables

In accordance with our goals, Fallbrook Senior Center has been providing an average of 42 meals per day, five days a week, at a minimal cost of \$5.00 to individuals aged 50 and above, fostering a sense of community that encourages social engagement. Throughout the third quarter, we distributed a total of 2672 meals to seniors, benefiting 165 residents of the Health District through our Congregate Meal Program. Additionally, we hosted numerous educational sessions led by nursing students from Cal State San Marcos, covering topics such as Special Nutrient Needs of Older Adults and Making Better Beverage Choices. These sessions also included blood pressure and glucose screenings. Our dedication to enriching seniors' lives features live music every Friday, and in May, we hosted a weeklong celebration filled with entertainment, food, and special events to mark our 50th Anniversary.

### Anticipated Acknowledgment

Social Media Postings

Signage at Service Sites

Print Materials to Service Recipients

Website Display

### Terms and Conditions

Accepted

### Authorized Signature



## Contact Information

### Contact Name

Susie Gonsalves

### Title

Executive Director

### Primary Contact Phone

7607284498

### Email Address

fallbrookscdirector@gmail.com

## Writing Instructions:

**What language(s) did this program accommodate:**

English

Spanish

## Acknowledgment of District Support



Social Media.pdf

## Impact Story



Testimonial.pdf

## Impact Story





Testimonial.pdf

### Program Budget



Cong 23\_24 FRHD CHC Prog...xlsx



**Actual number of residents that directly benefited (participant/client) from this program during the entire grant cycle.**

165



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fallbrookseniorcenter We extend our appreciation to our esteemed partner, The Fallbrook Regional Health District, whose collaboration enables impactful initiatives within the Fallbrook community. Thank you!  
 #fallbrookcalifornia #seniorcenter #partnerships

10w



fallbrookhealth You have a strong impact on the senior community in Fallbrook. Thank you for everything you do ❤️

10w Reply



10 likes

April 25

Log in to like or comment.

It's wonderful - nice  
healthy meals at a good  
price & great company!  
B. Sacc

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There are a couple of benefits that  
I enjoy. First is the variety of foods.  
If I eat at home it would be the same  
thing over and over. Second, I like talking  
and listening to other seniors. We can  
talk and relate to things from the  
past that are gone today like gas that  
use to cost 25¢ a gallon and medical  
issues that are mostly age related.  
Jim Hyl

**FRHD CHC GRANT BUDGET REPORTING FORM**

Agency Name: **Fallbrook Senior Citizens Service Club** PROGRAM NAME: **Congregate Meal Program**

The main categories align with the budget submitted with your application. Aggregate totals are all that should be reported under each heading.

1) <b>A</b>	<b>INDIRECT EXPENSES:</b>	PROGRAM COST	REQUESTED FROM FRHD	AMOUNT USED Q1	AMOUNT USED Q2	AMOUNT USED Q3	AMOUNT USED Q4
	TOTAL INDIRECT EXPENSE	\$37,800.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>B</b>	<b>PERSONNEL EXPENSES - PROGRAM SPECIFIC</b>	PROGRAM COST	REQUESTED FROM FRHD	AMOUNT USED Q1	AMOUNT USED Q2	AMOUNT USED Q3	AMOUNT USED Q4
	TOTAL PERSONNEL EXPENSE	\$71,500.00	\$17,000.00	\$4,250.00	\$4,250.00	\$4,250.00	\$4,250.00
<b>C</b>	<b>DIRECT PROGRAM EXPENSES</b>	PROGRAM COST	REQUESTED FROM FRHD	AMOUNT USED Q1	AMOUNT USED Q2	AMOUNT USED Q3	AMOUNT USED Q4
	TOTAL OTHER EXPENSES	\$67,100.00	\$30,000.00	\$7,500.00	\$7,500.00	\$7,500.00	\$7,500.00
<b>D</b>	<b>TOTALS</b>	PROGRAM COST	FRHD Funds Awarded	Total Amount Q1	Total Amount Q2	Total Amount Q3	Total Amount Q4
		\$176,400.00	\$47,000.00	\$11,750.00	\$11,750.00	\$11,750.00	\$11,750.00

Total funds expended to date: **\$47,000.00**