



# Orange County Mosquito and Vector Control District

Serving Orange County Since 1947

PURSUANT TO GOVERNOR GAVIN NEWSOM'S EXECUTIVE  
ORDER N-29-20 THIS MEETING WILL BE HELD AS A  
TELECONFERENCE MEETING

BOARD OF TRUSTEES MEETING  
THURSDAY MARCH 18, 2021  
3:00 P.M.

Observers may view the meeting on Zoom at:  
<https://us02web.zoom.us/j/89157418816>

Or Telephone:

Dial: 888 475 4499 (Toll Free), 877 853 5257 (Toll Free) or 213 338 8477  
Webinar ID: 891 5741 8816

Comments may be submitted via email to [agenda-comments@ocvector.org](mailto:agenda-comments@ocvector.org) up  
to one hour prior to beginning of the meeting.

If you want to make a comment during the meeting, please hit \*9 to raise your  
hand and be recognized by the moderator.



# Orange County Mosquito and Vector Control District

Serving Orange County Since 1947

**JOINT COMMITTEE MEETING: BUDGET AND FINANCE AND BUILDING, PROPERTY, &  
EQUIPMENT COMMITTEES MET FEBRUARY 24, 2021 AT 11:30 AM**

**JOINT COMMITTEE MEETING: BUDGET AND FINANCE AND BUILDING, PROPERTY, &  
EQUIPMENT COMMITTEES MET MARCH 1, 2021 AT 11:30 AM**

**JOINT COMMITTEE MEETING: BUDGET AND FINANCE AND BUILDING, PROPERTY, &  
EQUIPMENT COMMITTEE MET MARCH 10, 2021 AT 11:30 AM**

## **NOTICE AND AGENDA OF THE REGULAR MEETING OF THE BOARD OF TRUSTEES THURSDAY MARCH 18, 2021**

**889<sup>th</sup> REGULAR MEETING 3:00 P.M.**

**13001 GARDEN GROVE BLVD.**

**GARDEN GROVE, CA 92843**

**WEBSITE ADDRESS: [www.ocvector.org](http://www.ocvector.org)**

**REGULAR MEETING 3:00 P.M.**

### **A. PLEDGE OF ALLEGIANCE, ROLL CALL, AND LATE COMMUNICATIONS**

1. Call business meeting to order 3:00 p.m.
2. Pledge of Allegiance
3. Roll Call - (If absences occur, consider whether to deem those absences excused based on facts presented for the absence — such determination shall be the permission required by law.)

<b>PRESIDENT:</b>	Mike Posey	Huntington Beach
<b>VICE-PRESIDENT:</b>	James Gomez	La Habra
<b>SECRETARY:</b>	Peggy Huang	Yorba Linda

Aliso Viejo	Richard Hurt	Lake Forest	Vladimir Anderson
Anaheim	Lucille Kring	Los Alamitos	Tanya Doby
Brea	Cecilia Hupp	Mission Viejo	Bob Ruesch
Buena Park	Susan Sonne	Newport Beach	Joy Brenner
Costa Mesa	William Turpit	Orange	Michael Alvarez
Cypress	Jon Peat	Placentia	Craig Green
Dana Point	Richard Viczorek	Rancho Santa Margarita	April Josephson
Fountain Valley	Cheryl Brothers	San Clemente	Jim Dahl
Fullerton	Nick Dunlap	San Juan Capistrano	John Taylor
Garden Grove	Stephanie Klopfenstein	Santa Ana	Cecilia Aguinaga
Huntington Beach	Mike Posey	Seal Beach	Sandra Massa-Lavitt
Irvine	Tammy Kim	Stanton	Gary Taylor
La Habra	James Gomez	Tustin	Rebecca Gomez
La Palma	Nitesh Patel	Villa Park	Crystal Miles
Laguna Beach	Susan Kempf	Westminster	Chi Charlie Nguyen
Laguna Hills	Erica Pezold	Yorba Linda	Peggy Huang

4. Late/Other Communications

**B. PUBLIC COMMENTS**

**(Individual Public Comments may be limited to a 3-minute or less time limit)**

During Public Comments, the public may address the Board on any issue within the District's jurisdiction which is not on the agenda. The public may comment on any item on the Agenda at the time that item is before the Board for consideration. Any person wishing to speak must come up and speak from the lectern. There will be no dialog between the Board and the commenter. Any clarifying questions from the Board must go through the Board President.

**C. PRESENTATIONS**

1. Recognition of Outgoing Trustees
2. Staff will give a presentation entitle "Virtual Vectors: Teaching During Unprecedented Times"
3. Staff will give a presentation entitled "In2Care Trial as a Mosquito Control Option"
4. Staff will give a presentation entitled "Introduction of Potential Orange County Mosquito and Vector Control District Facility Relocation Location"

**D. OCMVCD COMMITTEE REPORTS TO THE BOARD OF TRUSTEES**

1. **Joint Committee Meeting:** Budget and Finance and Building, Property, and Equipment Committees **Met February 24, 2021, March 1, 2021, and March 10, 2021**

**E. CONSENT CALENDAR**

All matters listed under the CONSENT CALENDAR are considered by the District to be routine and will be enacted by one motion. Any member of the Board may pull an item from the Consent Calendar for additional clarification or action.

1. Approve the DRAFT Minutes for the regular meeting of February 18, 2021
2. Approve the Warrant Register for January 2021 (Exhibit A)
3. Approve the Monthly Financial Report for January 2021 (Exhibit A)

**F. BUSINESS ITEMS**

1. Discuss 1821 E. Dyer Road, Santa Ana, CA 92705 facility as a suitable District facility for District relocation
2. CLOSED SESSION: Under Government Code 54956.8 move into closed session to discuss property at 1821 East Dyer Road, Santa Ana, CA  
**Agency negotiator:** Richard Howard, District Manager, Alan Burns, District Counsel, and Wil Soholt, Kosmont Companies  
**Negotating parties:** MMACS LLC; SMM LLC, Represented by Owner Representatives JLL  
**Under negotiation:** Price and terms of payment
3. OPEN SESSION: Disclose any reportable action from closed session

**G. INFORMATIONAL ITEMS ONLY (NO ACTION NECESSARY)**

1. Staff Presentation: Staff will give an update on vector activity in Orange County
2. Staff Presentation: Staff will give an update on outreach activity in Orange County
3. Receive Statement of Economic Interests 700 Forms for Filing
4. Receive and File Laboratory Reports – Included in agenda packet

**H. PRESIDENT'S REPORT AND TRUSTEE COMMENTS**

**I. DISTRICT MANAGER'S REPORT – Discussion and Possible Action**

**J. DISTRICT LEGAL COUNSEL REPORT – Discussion and Possible Action**

**K. CORRESPONDENCE – Discussion and Possible Action**

1. Trustee and Staff reports from conferences attended in February and March 2021

**L. FUTURE AGENDA ITEMS**

**M. ADJOURNMENT**

1. Adjourn to the next regular meeting on April 15, 2021 starting at 3:00 p.m. at the Orange County Mosquito and Vector Control District offices, 13001 Garden Grove Blvd., Garden Grove, CA 92843



# ORANGE COUNTY MOSQUITO AND VECTOR CONTROL DISTRICT

March 18, 2021

## AGENDA REPORT

### AGENDA ITEM: C.1

**Prepared By:** Tawnia Pett, Executive Assistant/Clerk of the Board  
**Submitted By:** Rick Howard, District Manager

### Agenda Title:

Recognition of Outgoing Trustees

### Recommended Action:

Recognize Outgoing Trustees

### Executive Summary:

President Posey will virtually present a plaque to Trustee Ragen.

### Fiscal Impact:

Amount Requested \$ N/A

Sufficient Budgeted Funds Available:

Category: Pers. Optg. Cap. -or- CIP# Fund#

Previous Relevant Board Actions for This Item: N/A

### Exhibits:



# Orange County Mosquito and Vector Control District

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PURSUANT TO GOVERNOR GAVIN NEWSOM'S EXECUTIVE  
ORDER N-29-20 THIS MEETING WILL BE HELD AS A  
TELECONFERENCE MEETING

JOINT COMMITTEE MEETING:  
BUDGET AND FINANCE COMMITTEE  
&  
BUILDING, PROPERTY, AND EQUIPMENT COMMITTEE  
WEDNESDAY FEBRUARY 24, 2021  
11:30 A.M.

Observers may view the meeting on Zoom at:

<https://us02web.zoom.us/j/87643416677>

Or Telephone:

Dial: 888 475 4499 (Toll Free) 877 853 5257 (Toll Free) 213 338 8477

Webinar ID: 876 4341 6677

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**JOINT MEETING: BUDGET AND FINANCE COMMITTEE  
AND  
BUILDING, PROPERTY, & EQUIPMENT COMMITTEE  
MEETING NOTICE  
FEBRUARY 24, 2021  
11:30 A.M.**

**TO:** Budget and Finance Committee  
Richard Hurt  
Mike Posey  
Nitesh Patel  
Vladimir Anderson  
Bob Ruesch  
Jim Dahl  
Gary Taylor  
Crystal Miles  
Lala Ragen  
Aliso Viejo  
Huntington Beach  
La Palma  
Lake Forest  
Mission Viejo  
San Clemente  
Stanton  
Villa Park  
County of Orange

Building, Property, & Equipment Committee  
Lucille Kring  
Cecilia Hupp  
Bill Turpit  
Cheryl Brothers  
Erica Pezold  
Craig Green  
Sandra Massa-Lavitt  
Anaheim  
Brea  
Costa Mesa  
Fountain Valley  
Laguna Hills  
Placentia  
Seal Beach

**FROM:** Tawnia Pett, Executive Assistant/Clerk of the Board

**RE:** Joint Committee Meeting:  
11:30 a.m., Wednesday, February 24, 2021  
Teleconference Meeting

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**AGENDA**

1. Call to Order and Roll Call
2. Select Committee Chair for Budget and Finance Committee. Select Committee Chair for Building, Property, and Equipment Committee.
3. Public Comments
4. Provide the Joint Committee with a project update and status report on the District's effort to identify a long-term solution for the District's facilities.
5. Adjourn



**JOINT MEETING: BUDGET AND FINANCE COMMITTEE  
AND  
BUILDING, PROPERTY, & EQUIPMENT COMMITTEE  
MEETING NOTICE  
MARCH 01, 2021  
11:30 A.M.**

TO: Budget and Finance Committee

Richard Hurt	Aliso Viejo
Mike Posey	Huntington Beach
Nitesh Patel	La Palma
Vladimir Anderson	Lake Forest
Bob Ruesch	Mission Viejo
Jim Dahl	San Clemente
Gary Taylor	Stanton
Crystal Miles (C)	Villa Park
Lala Ragen	County of Orange

Building, Property, & Equipment Committee

Lucille Kring	Anaheim
Cecilia Hupp	Brea
Bill Turpit	Costa Mesa
Cheryl Brothers	Fountain Valley
Erica Pezold	Laguna Hills
Craig Green (C)	Placentia
Sandra Massa-Lavitt	Seal Beach

FROM: Tawnia Pett, Executive Assistant/Clerk of the Board

RE: **NOTE: This is an In-Person Meeting/Facility Tour**  
Joint Committee Meeting:  
11:30 a.m., Monday March 01, 2021  
1821 E. Dyer Rd. Santa Ana, CA 92705

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**AGENDA**

1. Call to Order and Roll Call
2. Public Comments
3. Tour the facility at 1821 E. Dyer Road, Santa Ana, CA 92705 to determine its suitability as a District facility
4. Adjourn

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# Orange County Mosquito and Vector Control District

Serving Orange County Since 1947

PURSUANT TO GOVERNOR GAVIN NEWSOM'S EXECUTIVE  
ORDER N-29-20 THIS MEETING WILL BE HELD AS A  
TELECONFERENCE MEETING

JOINT COMMITTEE MEETING:  
BUDGET AND FINANCE COMMITTEE  
&  
BUILDING, PROPERTY, AND EQUIPMENT COMMITTEE  
WEDNESDAY MARCH 10, 2021  
11:30 A.M.

Observers may view the meeting on Zoom at:

<https://us02web.zoom.us/j/82293281480>

Or Telephone:

Dial: 888 475 4499 (Toll Free) 877 853 5257 (Toll Free) 213 338 8477

Webinar ID: 822 9328 1480

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**JOINT MEETING: BUDGET AND FINANCE COMMITTEE  
AND  
BUILDING, PROPERTY, & EQUIPMENT COMMITTEE  
MEETING NOTICE  
MARCH 10, 2021 11:30 A.M.**

TO: Budget and Finance Committee  
Richard Hurt  
Mike Posey  
Nitesh Patel  
Vladimir Anderson  
Bob Ruesch  
Jim Dahl  
Gary Taylor  
Crystal Miles (C)  
Lala Ragen  
Aliso Viejo  
Huntington Beach  
La Palma  
Lake Forest  
Mission Viejo  
San Clemente  
Stanton  
Villa Park  
County of Orange

Building, Property, & Equipment Committee  
Lucille Kring  
Cecilia Hupp  
Bill Turpit  
Cheryl Brothers  
Erica Pezold  
Craig Green (C)  
Sandra Massa-Lavitt  
Anaheim  
Brea  
Costa Mesa  
Fountain Valley  
Laguna Hills  
Placentia  
Seal Beach

FROM: Tawnia Pett, Executive Assistant/Clerk of the Board

RE: Joint Committee Meeting:  
11:30 a.m., Wednesday, March 10, 2021  
Teleconference Meeting

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**AGENDA**

1. Call to Order and Roll Call
2. Public Comments
3. Provide the Joint Committee with a project update and status report on the District's effort to identify a long-term solution for the District's facilities.
4. Closed Session: Under Government Code 54956.8 move into closed session to discuss property at 1821 East Dyer Road, Santa Ana, CA  
**Agency negotiator:** Richard Howard, District Manager, Alan Burns, District Counsel, and Wil Soholt, Kosmont Companies  
**Negotiating parties:** MMACS LLC; SMM LLC, Represented by Owners Representatives JLL  
**Under negotiation:** Price and terms of payment
5. Open Session: Discuss any reportable action from closed session
6. That the Joint-Committee make a recommendation to the Full Board of Trustees regarding possible acquisition of 1821 East Dyer Road, Santa Ana, CA.
7. Adjourn

**MINUTES OF THE 888<sup>th</sup> MEETING**

**BOARD OF TRUSTEES  
Orange County Mosquito and Vector Control District**

TIME: 3:00 P.M. February 18, 2021

PLACE: 13001 Garden Grove Blvd., Garden Grove, CA 92843  
MEETING TOOK PLACE BY TELECONFERENCE

PRESIDENT:	Mike Posey	Huntington Beach
VICE-PRESIDENT:	James Gomez	La Habra
SECRETARY:	Peggy Huang	Yorba Linda

TRUSTEES PRESENT:

Aliso Viejo	Richard Hurt	Lake Forest	Vladimir Anderson
Anaheim	Lucille Kring	Los Alamitos	Tanya Doby
Brea	Cecilia Hupp	Mission Viejo	Bob Ruesch
Buena Park	Susan Sonne	Newport Beach	Joy Brenner
Costa Mesa	Bill Turpit	Orange	Michael Alvarez
Cypress	Jon Peat	Placentia	Craig Green
Dana Point	Rick Viczorek	Rancho Santa Margarita	April Josephson
Fountain Valley	Cheryl Brothers	San Clemente	Jim Dahl
Garden Grove	Stephanie Klopfenstein	San Juan Capistrano	John Taylor
Huntington Beach	Mike Posey	Santa Ana	Cecilia Aguinaga
Irvine	Tammy Kim	Seal Beach	Sandra Massa- Lavitt
La Habra	James Gomez	Stanton	Gary Taylor
La Palma	Nitesh Patel	Tustin	Rebecca Gomez
Laguna Beach	Sue Kempf	Villa Park	Crystal Miles
Laguna Hills	Erica Pezold	Westminster	Chi Charlie Nguyen
Laguna Niguel	Rischi Paul Sharma	Yorba Linda	Peggy Huang
Laguna Woods	Shari Horne	County of Orange	Lala Ragen

TRUSTEES ABSENT:

Fullerton                      Nick Dunlap

OTHERS PRESENT:

Rick Howard, District Manager  
Lora Young, Director of Communications  
Amber Semrow, Director of Scientific Technical Services  
Steve Shepherd, Director of Operations  
Tawnia Pett, Executive Assistant/Clerk of the Board  
Alan Burns, District Counsel

**A. Opening:**

1. **Call the Business Meeting to Order:** President Posey called the meeting to order at 3:04 P.M.
2. **Pledge of Allegiance:** President Posey asked former Trustee Morris to lead the Pledge of Allegiance.
3. **Roll Call:** Roll call indicated 34 Trustees were present out of the current Board membership of 35.

**President Posey had the new trustee introduce herself: Trustee Kempf from Laguna Beach.**

4. **Late/Other Communications: None**  
**Late Communications:**

**Other Communications:**

**B. Public Comments: None**

**C. Presentations:**

1. **Recognized Outgoing Trustees:** President Posey virtually presented Trustees Genis, Khan, and Morris with a plaque recognizing their years of service.
2. Staff gave a presentation entitled "OCMVCD Year in Review 2020"
3. District Counsel Burns gave a presentation entitled "Trustee Roles and Responsibilities"

**D. OCMVCD Committee Reports to the Board of Trustees: None**

**E. Consent Calendar: Items for Approval by General Consent**

On motion from Trustee Kring, seconded by Trustee Miles, and passed by unanimous vote, the Board of Trustees approved Consent Calendar Items E.2 through E.5. Agenda Item E.1 was passed by majority vote due to absences at the previous Board Meeting (Abstained: Trustee Kempf).

**Ayes:** Trustees Hurt, Kring, Hupp, Sonne, Turpit, Peat, Viczorek, Brothers, Klopfenstein, Posey, Kim, J. Gomez, Patel, Kempf, Pezold, Sharma, Horne, Anderson, Doby, Ruesch, Brenner, Alvarez, Green, Josephson, Dahl, J. Taylor, Aguinaga, Massa-Lavitt, G. Taylor, R. Gomez, Miles, Nguyen, Huang, and Ragen.

**Noes:** None.

**Abstained:** None.

**Absent:** Trustee Dunlap.

1. **Approval of Minutes:** Approved, without reading, the Minutes of the 887<sup>th</sup> Meeting of the Board of Trustees held January 21, 2021.
2. **Approved Warrant Register for December 2020: (Exhibit A)** Received and filed.
3. **Approved Monthly Financial Report for December 2020: (Exhibit A)** Received and filed.
4. **Approved Board of Trustees Committee Assignments for 2021: (Exhibit A)**

5. **Approved Contract with Cintas Corporations to Provide Uniforms for District Staff: (Exhibit A)** Approved a five-year agreement with Cintas Corporation to provide uniform services for District Staff.

F. **Business and Action Items: None**

G. **Informational Items Only (NO ACTION NECESSARY):**

1. **Staff Presentation:** Director of Scientific Technical Services Semrow gave an update of vector activity in Orange County.
2. **Staff Presentation:** Director of Communications Young gave an update on outreach activity in Orange County.
3. **Received Fiscal Year 2021-2022 Budget Preparation Schedule:** Received and filed.
4. **Received Statement of Economic Interests 700 Forms for Filing:** Received and filed.
5. **Laboratory Reports- included in agenda packet:** Received and filed.

H. **President's Report and Trustee Comments:**

1. President Posey spoke of the potential new District property opportunity.

I. **District Manager's Report:** District Manager Howard reported:

1. District projects put on hold because of COVID-19: property facility search, Sterilized Insect Technique joint project with Greater Los Angeles County MVCD and San Gabriel Valley MVCD, underground rover program for storm drain systems, and reorganization of Operations Department.
2. District Legislative Open House, February 11, 2021.
3. City Council Open House, March 25, 2021.
4. MVCAC Conference- Staff and Trustee reports included in the agenda packet.
5. ISDOC Vacancy for Second Vice President

J. **District Legal Counsel Report: None**

K. **Correspondence:**

1. Trustee and Staff reports from Virtual MVCAC Annual Conference February 1-3, 2021

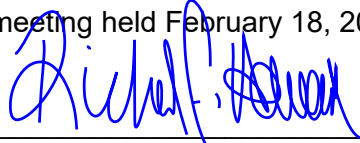
L. **Future Agenda Items:**

1. Building Project in March.
2. District Budget will be distributed at the April board meeting.

M. **Adjournment:**

1. President Posey adjourned the meeting at 4:45 p.m. to the next regularly scheduled meeting on Thursday, March 18, 2021.

I certify that the above minutes substantially reflect the actions taken by the Board of Trustees at its meeting held February 18, 2021.



\_\_\_\_\_  
Richard Howard, District Manager

Approved as written and/or corrected by the Board of Trustees at its \_\_\_\_\_

\_\_\_\_\_ meeting held \_\_\_\_\_

ATTEST: \_\_\_\_\_  
Peggy Huang, Secretary



# ORANGE COUNTY MOSQUITO AND VECTOR CONTROL DISTRICT

March 18, 2021

## AGENDA REPORT

### AGENDA ITEM E.2

**Prepared By:** Tan Nguyen, Finance Manager  
**Submitted By:** Rick Howard, District Manager

#### Agenda Title:

Approve Warrant Register for January 2021

#### Recommended Action:

Receive and file.

#### Executive Summary:

Receive and file payment of January warrant register dated March 18, 2021 in the amount of \$637,024.88 as presented by in-house check runs dated January 4, 6, 7, 14, 21, 27, 28, 29, and 31, 2021.

#### Fiscal Impact:

**Amount Requested \$ N/A**

**Sufficient Budgeted Funds Available:**

**Category: Pers. Optg. Cap. -or- CIP# Fund#**

#### Previous Relevant Board Actions for This Item:

#### Exhibits:

**Exhibit A:** January 2021 Warrant Report

# ORANGE COUNTY MOSQUITO & VECTOR CONTROL DISTRICT


REGISTER OF DEMANDS MARCH 18, 2021

## ACCOUNTS PAYABLE REGISTER

<b>ORANGE COUNTY MOSQUITO &amp; VECTOR CONTROL DISTRICT</b>		
REGISTER OF DEMANDS		
3/18/2021		
ACCOUNTS PAYABLE REGISTER		
A/P Check Run	1/7/2021	11,832.75
A/P Check Run	1/14/2021	56,411.75
A/P Check Run	1/21/2021	26,134.83
A/P Check Run	1/27/2021	6,837.12
A/P Check Run	1/28/2021	92,923.13
A/P Check Run	1/31/2021	6,004.17
P/R EEASSOC	1/4/2021	847.50
P/R ICMA	1/4/2021	23,739.63
P/R NATION	1/4/2021	4,210.00
P/R USB	1/4/2021	202.99
P/R ICMA	1/6/2021	150.00
P/R USB	1/6/2021	29.35
P/R EEASSOC	1/6/2021	817.50
P/R ICMA	1/6/2021	19,991.05
P/R NATION	1/6/2021	5,060.00
P/R USB	1/6/2021	156.47
P/R CALPERS1	1/28/2021	620.80
P/R EDD	1/28/2021	703.39
P/R IRS	1/28/2021	2,467.32
P/R CALPERS1	1/28/2021	38,877.72
P/R EDD	1/28/2021	24,561.58
P/R IRS	1/28/2021	33,228.89
P/R TASC	1/28/2021	2,365.18
P/R CALPERS1	1/28/2021	73,583.51
P/R EEASSOC	1/28/2021	817.50
P/R ICMA	1/28/2021	19,755.75
P/R NATION	1/28/2021	5,060.00
P/R USB	1/28/2021	106.12
P/R CALPERS1	1/29/2021	37,307.99
P/R EDD	1/29/2021	11,317.61
P/R IRS	1/29/2021	32,535.91
P/R TASC	1/29/2021	2,259.41
P/R CALPERS1	1/29/2021	39,045.93
P/R EDD	1/29/2021	21,420.58
P/R IRS	1/29/2021	33,276.27
P/R TASC	1/29/2021	2,365.18
<b>TOTAL</b>		<b>\$ 637,024.88</b>



I hereby certify that the claims or demands covered by the foregoing listed warrants have been audited as to the accuracy and availability of funds for payment thereof. Subscribed and sworn on this 18<sup>TH</sup> day of March 2021.

  
Rick Howard, District Manager

  
Tan Nguyen, Finance Manager

# Accounts Payable

## Checks by Date - Summary by Check Date

User: chumphrey  
 Printed: 2/25/2021 11:13 AM



Check No	Vendor No	Vendor Name	Check Date	Check Amount
ACH	EEASSOC	OCVCD Employee Association	01/04/2021	847.50
ACH	ICMA	ICMA	01/04/2021	23,739.63
ACH	NATION	Nationwide Retirement Solutions	01/04/2021	4,210.00
ACH	USB	PARS/U.S. Bank N.A. Minnesota	01/04/2021	202.99
Total for 1/4/2021:				29,000.12
ACH	ICMA	ICMA	01/06/2021	150.00
ACH	USB	PARS/U.S. Bank N.A. Minnesota	01/06/2021	29.35
ACH	EEASSOC	OCVCD Employee Association	01/06/2021	817.50
ACH	ICMA	ICMA	01/06/2021	19,991.05
ACH	NATION	Nationwide Retirement Solutions	01/06/2021	5,060.00
ACH	USB	PARS/U.S. Bank N.A. Minnesota	01/06/2021	156.47
Total for 1/6/2021:				26,204.37
ACH	IRON	Iron Mountain Records Mgmt, Inc.	01/07/2021	111.11
ACH	Steri	Stericycle, Inc.	01/07/2021	1,225.01
25487	ATT2	AT&T	01/07/2021	324.12
25488	Bel-Air	Bel-Air Shells	01/07/2021	1,995.94
25489	CAGATE	California Gate & Entry System	01/07/2021	141.23
25490	CINTAS	Cintas Corporation No. 2	01/07/2021	1,233.29
25491	DELIRA A	Anthony De Lira	01/07/2021	140.06
25492	GFS	Governmental Financial Services	01/07/2021	585.00
25493	HARPER	Harper & Burns, LLP	01/07/2021	3,104.00
25494	HILL	John Hill	01/07/2021	64.64
25495	KWEST	K'WEST Printing	01/07/2021	842.81
25496	MARTIN D	Daniel Martinez	01/07/2021	575.00
25497	OREILLY	O'Reilly Auto Enterprises, LLC	01/07/2021	234.64
25498	QDOXS	Q Document Solutions, Inc,	01/07/2021	113.10
25499	S & R	S & R A/C And Heating, Inc.	01/07/2021	209.38
25500	SMART	Smart & Final Stores Corp	01/07/2021	227.74
25501	TOYOTAGG	Toyota Place	01/07/2021	705.68
Total for 1/7/2021:				11,832.75
ACH	Arnold	Richard Arnold	01/14/2021	1,250.00
ACH	DSC	Discovery Cube Orange County	01/14/2021	24,500.00
ACH	GG DISP	Republic Waste Svcs of So. Calif., LLC	01/14/2021	1,968.69
ACH	HASLER	MAIL FINANCE INC.	01/14/2021	597.86
ACH	LIFE	Life Technologies	01/14/2021	2,536.36
ACH	PRAXAIR	Praxair Distribution, Inc	01/14/2021	266.22
ACH	SPARK	Sparkletts	01/14/2021	389.03
ACH	VERIZON	Verizon Wireless Services LLC	01/14/2021	5,623.53
ACH	EDD	Employment Development Dept.	01/14/2021	317.46
ACH	IRS	Internal Revenue Service	01/14/2021	1,197.70
25502	ARCHIES	Archies Towing	01/14/2021	142.50

Check No	Vendor No	Vendor Name	Check Date	Check Amount
25503	CINTAS	Cintas Corporation No. 2	01/14/2021	731.47
25504	CLARKE	Clarke Mosquito Control Prod Inc.	01/14/2021	10,605.60
25505	ENVIRO	Enviro Services, Inc.	01/14/2021	1,347.07
25506	FISHER	Fisher Scientific	01/14/2021	147.40
25507	GRAINGER	Grainger	01/14/2021	2,214.24
25508	IDS	IDS Real Estate Group	01/14/2021	2,019.24
25509	OFFICE	OFFICE DEPOT, INC.	01/14/2021	61.13
25510	TT DEPOT	The Technology Depot, Inc.	01/14/2021	46.25
25511	ANDTECH	Andtech Corporation	01/14/2021	450.00
Total for 1/14/2021:				56,411.75
ACH	SPECTRUM	Time Warner Cable/Spectrum	01/21/2021	1,494.00
ACH	VZCONNEC	VERIZON CONNECT NWF, INC	01/21/2021	1,570.43
25512	AMAZON	AMAZON/SYNCB	01/21/2021	2,503.75
25513	ARCPOINT	Sarita Sadhwani	01/21/2021	2,375.00
25514	AT T	AT&T MOBILITY	01/21/2021	31.95
25515	AT&T	AT&T	01/21/2021	68.12
25516	CINTAS	Cintas Corporation No. 2	01/21/2021	520.65
25517	DOJ	State of California	01/21/2021	49.00
25518	FM	F M CREDIT CARD	01/21/2021	13,974.24
25519	GENESEE	Genesee Scientific Corporation	01/21/2021	327.07
25520	HILLS	Hill's Bros. Lock & Safe, Inc.	01/21/2021	374.50
25521	HOME DEP	Acct 6035 3225 0389 2048 Home Depot C	01/21/2021	741.33
25522	OREILLY	O'Reilly Auto Enterprises, LLC	01/21/2021	943.02
25523	PR	P & R Paper Supply Company, Inc.	01/21/2021	425.80
25524	SCG	Southern Calif. Gas Co.	01/21/2021	426.86
25525	TOYOTAGG	Toyota Place	01/21/2021	89.11
25526	TRUCPAR	Truck & Auto Supply, Inc.	01/21/2021	220.00
Total for 1/21/2021:				26,134.83
ACH	ABBE	ROGER ABBE	01/27/2021	49.78
ACH	ARIASA	Adina Arias	01/27/2021	234.05
ACH	BENNETT	Stephen Bennett	01/27/2021	234.05
ACH	BOBBITT	Catherine Bobbitt	01/27/2021	234.05
ACH	CAMPBELL	JAMES CAMPBELL	01/27/2021	75.27
ACH	DAIKER	John Daiker	01/27/2021	260.80
ACH	EDISON	SUZANNE R. EDISON	01/27/2021	289.20
ACH	ELLIOTT	MARGARET ELLIOTT	01/27/2021	49.78
ACH	EVER	GARY EVERINGHAM	01/27/2021	104.90
ACH	FOGARTY	Carrie Fogarty	01/27/2021	234.05
ACH	Goedhart	Gerard Goedhart	01/27/2021	234.05
ACH	HEARST	Michael Hearst	01/27/2021	434.05
ACH	Huff	Robert Huff	01/27/2021	234.05
ACH	KELLER	JUSTINE KELLER	01/27/2021	75.27
ACH	KIMBALL	Deborah Kimball	01/27/2021	234.05
ACH	KOENIG	Steve Koenig	01/27/2021	234.05
ACH	LACHANCE	Glenn LaChance	01/27/2021	341.30
ACH	LOUGHNER	LINDA LOUGHNER	01/27/2021	225.80
ACH	MCCARTY	Danny McCarty	01/27/2021	234.05
ACH	MILLER J	Jon Miller	01/27/2021	234.05
ACH	MONTANI	Karen Montani	01/27/2021	88.19
ACH	NIEWOLA	Urszula Niewola	01/27/2021	234.05
ACH	PARSONS	John Parsons	01/27/2021	234.05
ACH	POSPISIL	Terry Pospisil	01/27/2021	234.05
ACH	REES	JETTE REES	01/27/2021	112.00

Check No	Vendor No	Vendor Name	Check Date	Check Amount
ACH	Rehders	Renee Rehders	01/27/2021	234.05
ACH	REINIG	Allyson Reinig	01/27/2021	234.05
ACH	Reisin	Caroline Reisinger	01/27/2021	234.05
ACH	Reynolds	Thomas Reynolds	01/27/2021	49.78
ACH	RINCON	Claudio Rincon	01/27/2021	234.05
ACH	SHAW	LAWRENCE SHAW	01/27/2021	234.05
ACH	SIPE	Russell Sipe	01/27/2021	234.05
ACH	Velten	Robert K. Velten	01/27/2021	234.05
Total for 1/27/2021:				6,837.12
ACH	CalPERS1	CalPERS	01/28/2021	620.80
ACH	EDD	Employment Development Dept.	01/28/2021	703.39
ACH	IRS	Internal Revenue Service	01/28/2021	2,467.32
ACH	CalPERS1	CalPERS	01/28/2021	38,877.72
ACH	EDD	Employment Development Dept.	01/28/2021	24,561.58
ACH	IRS	Internal Revenue Service	01/28/2021	33,228.89
ACH	TASC	Total Administrative Services Corp.	01/28/2021	2,365.18
ACH	CALPERS	Calif. Public Employees' Retirement	01/28/2021	73,583.51
ACH	EEASSOC	OCVCD Employee Association	01/28/2021	817.50
ACH	ICMA	ICMA	01/28/2021	19,755.75
ACH	NATION	Nationwide Retirement Solutions	01/28/2021	5,060.00
ACH	USB	PARS/U.S. Bank N.A. Minnesota	01/28/2021	106.12
ACH	PRAXAIR	Praxair Distribution, Inc	01/28/2021	896.26
ACH	STERI	Stericycle, Inc.	01/28/2021	1,225.01
ACH	TARGET	Target Specialty Products	01/28/2021	853.69
25527	AT T FAX	AT&T	01/28/2021	323.27
25528	CINTAS	Cintas Corporation No. 2	01/28/2021	485.79
25529	CLARKE	Clarke Mosquito Control Prod Inc.	01/28/2021	62,317.51
25530	CROWN	Crown Maintenance	01/28/2021	215.00
25531	ENVIRO	Enviro Services, Inc.	01/28/2021	1,385.00
25532	EWING	Ewing Irrigation Products, Inc.	01/28/2021	62.58
25533	HARBOR	Harbor Freight Tools	01/28/2021	30.41
25534	HASFIN	Quadient Finance USA, Inc	01/28/2021	300.00
25535	INSIGHT	Insight Public Sector, Inc.	01/28/2021	3,358.50
25536	JUST	JUST TIRES	01/28/2021	953.51
25537	PARS	Public Agency Retirement Svcs	01/28/2021	300.00
25538	PLAYERS	Michael J. Mackenzie	01/28/2021	192.85
25539	PROLOCK	Professional Lock System, Inc.	01/28/2021	285.00
25540	STAPLES	Staples Business Advantage	01/28/2021	470.03
25541	TOYOTAGG	Toyota Place	01/28/2021	158.45
25542	VORTEX	Vortex Industries, Inc.	01/28/2021	930.10
25543	WDA	Wildlife Disease Association	01/28/2021	128.00
25544	WOODRUFF	Woodruff Spradlin & Smart	01/28/2021	3,850.00
25545	XEROX	Xerox Financial Services	01/28/2021	616.62
25546	ZEP	Acuity Specialty Products, Inc.	01/28/2021	184.39
25547	AFLAC	American Family Life Assurance Co., of C	01/28/2021	2,926.96
25548	GUARD	Guardian - Appleton	01/28/2021	9,363.25
25549	VSP	Vision Service Plan	01/28/2021	1,110.95
Total for 1/28/2021:				295,070.89
ACH	CalPERS1	CalPERS	01/29/2021	37,307.99
ACH	EDD	Employment Development Dept.	01/29/2021	11,317.61
ACH	IRS	Internal Revenue Service	01/29/2021	32,535.91
ACH	TASC	Total Administrative Services Corp.	01/29/2021	2,259.41
ACH	CalPERS1	CalPERS	01/29/2021	39,045.93

Check No	Vendor No	Vendor Name	Check Date	Check Amount
ACH	EDD	Employment Development Dept.	01/29/2021	21,420.58
ACH	IRS	Internal Revenue Service	01/29/2021	33,276.27
ACH	TASC	Total Administrative Services Corp.	01/29/2021	2,365.18
Total for 1/29/2021:				179,528.88
ACH	ARCO	ARCO Business Solutions	01/31/2021	5,782.17
ACH	OC TOLL	OC Toll Roads	01/31/2021	222.00
Total for 1/31/2021:				6,004.17
Report Total (145 checks):				637,024.88



# ORANGE COUNTY MOSQUITO AND VECTOR CONTROL DISTRICT

March 18, 2021

## AGENDA REPORT

### AGENDA ITEM E.3

**Prepared By:** Tan Nguyen, Finance Manager  
**Submitted By:** Rick Howard, District Manager

#### Agenda Title:

Approve Monthly Financial Report for January 2021

#### Recommended Action:

Receive and file

#### Executive Summary:

Accept for inclusion, the Orange County Mosquito and Vector Control District Monthly Financial Report for January 2021

#### Fiscal Impact:

Amount Requested \$ N/A

Sufficient Budgeted Funds Available:

Category: Pers. Optg. Cap. -or- CIP# Fund#

#### Previous Relevant Board Actions for This Item:

#### Exhibits:

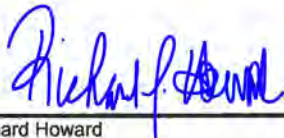
Exhibit A: Monthly Financial Report for January 2021

**Orange County Mosquito and Vector Control District**  
**Monthly Financial Report**  
**Month Ending January 31, 2021**

Fund No.	Fund	Cash Balance 12/31/2020	Revenue	Expenditures	Transfers	Accrual Adjustment	Cash Balance 1/31/2021	Cash Balance 1/31/2020
10	Operating	\$ 9,287,696	\$ 552,987	\$ 862,513	\$ -	\$ (7,908)	\$ 8,970,262	\$ 6,157,254
20	Vehicle Replacement	556,484	1,163	-	-	-	557,647	533,243
30	Liability Reserve	361,441	756	-	-	-	362,197	356,567
40	Equipment Replacement	838,528	1,753	-	-	-	840,281	827,220
50	Emergency Vector Control	1,678,883	3,510	-	-	-	1,682,393	1,656,243
60	Facility Improvement	8,254,058	42,565	3,850	-	-	8,292,773	7,893,501
70	Habitat Remediation	100,002	-	-	-	-	100,002	100,002
90	Retiree Medical Insurance	92,519	2,364	16,782	-	112	78,213	239,784
95	Retirement Contingency	253,768	530	-	-	-	254,298	250,346
99	Payroll Clearing	163,355	-	-	-	(98,741)	64,614	57,201
		<b>\$ 21,586,734</b>	<b>\$ 605,628</b>	<b>\$ 883,145</b>	<b>\$ -</b>	<b>\$ (106,537)</b>	<b>\$ 21,202,680</b>	<b>\$ 18,071,361</b>

Cash & Investment Balances:		Monthly Yield
California LAIF	\$ 6,366,365	0.458%
O.C. Treasurer	1,727,603	0.635%
Stifel Brokerage account		
Money market (par)	44,502	0.01%
Fixed income - Muni (par)	1,860,000	2.52%
Fixed income - other (par)	3,190,000	2.32%
Unamortized premium/(discount) on investments	72,777	n/a
F&M Checking	7,693,717	n/a
Payroll Checking	91,408	n/a
F&M HBP	146,308	0.04%
Petty Cash - Checking	10,000	n/a
<b>Total Cash and Investments</b>	<b>\$ 21,202,680</b>	

Section 115 Irrevocable Trust Balances:		3-month return
PARS Post-Employment Benefits Trust	\$ 3,960,130	8.90%
PARS Pension Trust	2,366,866	8.89%
<b>Total PARS Trust Balances</b>	<b>\$ 6,326,996</b>	



Richard Howard  
District Manager



Tan Nguyen  
Finance Manager

**Monthly Cash Flow**

Month	Revenue	Expenditures	Transfers	Accrual Adjustment	Monthly Cash Flow	Prior Year Comparison
July	\$ 40,367	\$ 1,511,848	\$ -	\$ 37,561	\$ (1,433,920)	\$ (935,740)
August	85,952	1,134,990	-	(7,739)	(1,056,777)	(1,501,829)
September	150,025	993,392	-	20,287	(823,080)	(864,577)
October	59,729	1,476,465	-	25,940	(1,390,796)	(1,419,021)
November	2,912,653	948,412	-	33,513	1,997,754	1,710,464
December	5,509,837	1,064,879	-	79,901	4,524,859	4,564,325
January	605,628	883,145	-	(106,537)	(384,054)	(267,536)
February					-	(785,792)
March					-	297,970
April					-	3,535,134
May					-	(368,295)
June					-	(944,530)
<b>Total YTD</b>	<b>\$ 9,364,191</b>	<b>8,013,131</b>	<b>\$ -</b>	<b>\$ 82,926</b>	<b>\$ 1,433,986</b>	<b>\$ 3,020,573</b>

**Revenues: 58% of Fiscal Year**

10-Operating Fund	Budget	Actual	Percentage
Property Taxes	\$ 6,329,449	\$ 3,860,991	61.0%
1996 Benefit Assessment	1,563,213	902,148	57.7%
2004 Benefit Assessment	6,682,713	3,822,932	57.2%
Interest and Concessions	65,000	32,176	49.5%
Miscellaneous	1,000	2,051	205.1%
Successor Agency Pass thru/Residual	282,145	353,916	125.4%
Rent for Cell Sites	28,200	19,794	70.2%
VCJPA Pooled Services	72,000	63,123	87.7%
CDPH - CA State Grant	-	-	0.0%
Charges for Services	50,000	58,119	116.2%
<b>Total Operating Fund Revenues</b>	<b>15,073,720</b>	<b>9,115,250</b>	<b>60.5%</b>

The major distributions of property tax and benefit assessments occur in four installments: December, January, April, and May

Monies come through the County and are unpredictable

No.	Other Funds	Budget	Actual	Percentage
20	Vehicle Replacement	17,000	2,441	14.4%
30	Liability Reserve	4,000	1,586	39.7%
40	Equipment Replacement	9,000	3,679	40.9%
50	Emergency Vector Control	15,000	7,365	49.1%
60	Facility Improvement	380,000	211,887	55.8%
70	Habitat Remediation	-	-	0.0%
90	Retiree Medical Insurance	38,760	20,870	53.8%
95	Retirement Contingency	4,000	1,113	27.8%
	<b>Total Other Funds</b>	<b>446,760</b>	<b>248,941</b>	<b>55.7%</b>
	<b>Total Revenue</b>	<b>\$ 15,541,480</b>	<b>\$ 9,364,191</b>	<b>60.3%</b>

**Expenditures: 58% of Fiscal Year**

No.	10-Operating Fund	Budget	Actual	Percentage
110	Trustees	\$ 78,050	\$ 19,487	25.0%
120	District Manager	431,050	232,434	53.9%
130	Legal Services	124,000	49,354	39.8%
140	Non-Departmental	310,500	166,091	53.5%
	<b>Executive</b>	<b>943,600</b>	<b>467,366</b>	<b>49.5%</b>
210	Administrative Services	848,270	436,521	51.5%
220	Insurance	706,500	762,292	107.9%
	<b>Administrative Services</b>	<b>1,554,770</b>	<b>1,198,813</b>	<b>77.1%</b>
310	Technical Services	1,794,375	976,495	54.4%
	<b>Scientific Technical Services</b>	<b>1,794,375</b>	<b>976,495</b>	<b>54.4%</b>
410	Field Operations	7,160,400	3,692,116	51.6%
430	Vehicle Maintenance	861,700	325,335	37.8%
440	Building Maintenance	256,510	308,243	120.2%
	<b>Operations</b>	<b>8,278,610</b>	<b>4,325,694</b>	<b>52.3%</b>
510	Public Information	791,475	388,527	49.1%
520	Information Technology	766,640	408,598	53.3%
530	Public Service	171,000	92,940	54.4%
	<b>Public Information</b>	<b>1,729,115</b>	<b>890,065</b>	<b>51.5%</b>
	<b>Total Operating Fund Expenditures</b>	<b>14,300,470</b>	<b>7,858,433</b>	<b>55.0%</b>

Annual insurance premiums were paid in July

Increases cost related to security guard and sanitizing services

No.	Other Funds	Budget	Actual	Percentage
20	Vehicle Replacement	-	-	0.0%
30	Liability Reserve	-	-	0.0%
40	Equipment Replacement	-	-	0.0%
50	Emergency Vector Control	-	-	0.0%
60	Facility Improvement	42,000	23,130	55.1%
70	Habitat Remediation	-	-	0.0%
90	Retiree Medical Insurance	198,650	131,568	66.2%
95	Retirement Contingency	100,000	-	0.0%
	<b>Total Other Funds</b>	<b>340,650</b>	<b>154,698</b>	<b>45.4%</b>
	<b>Total Expenditures</b>	<b>\$ 14,641,120</b>	<b>8,013,131</b>	<b>54.7%</b>



## STIFEL PRESTIGE® ACCOUNT STATEMENT

1 1 1 D179045 SSNR00801

**ORANGE COUNTY MOSQUITO &  
VECTOR CONTROL DISTRICT  
13001 GARDEN GROVE BLVD  
GARDEN GROVE CA 92843-2102**



*Your Financial Advisor (LU04):*  
SANDRA WHEELER  
Telephone: (805) 783-2921

*Office Serving Your Account:*  
999 MONTEREY ST. STE. 360  
SAN LUIS OBISPO, CA 93401

**PRIMARY INVESTMENT OBJECTIVE: Income**  
**RISK TOLERANCE: Moderate**

For a full definition of this objective and risk tolerance, including the use of margin, please see [www.stifel.com](http://www.stifel.com), IMPORTANT DISCLOSURES, or contact your Financial Advisor. If you have any questions concerning your investment objective or risk tolerance, or wish to make a change, please contact your Financial Advisor or the Branch Manager for this office.

**TRADING TAX LOT RELIEF METHOD: First In, First Out**  
**INVESTOR UPDATE**

What are your financial resolutions for 2021? Put away more for retirement? Start saving for college? Review estate planning matters? Whatever your goals may be, your Stifel Financial Advisor can help.

**ACCOUNT PROTECTION**

Stifel, Nicolaus & Company, Incorporated provides up to \$150 million of coverage for securities held in client accounts, of which \$1.15 million may be in cash deposits. Ask your Financial Advisor for more details.

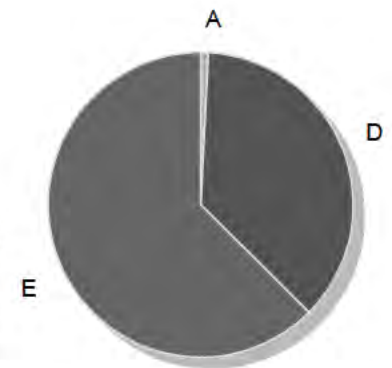
Thank you for allowing Stifel to serve you. In order to protect your rights, including rights under the Securities Investor Protection Act (SIPA), please promptly report, in writing, any inaccuracies or discrepancies in this account or statement to the Compliance Department of Stifel at the address below. If you have any questions regarding your account or this statement, please contact your Financial Advisor or the Branch Manager for this office. For additional information regarding your Stifel account, please refer to the current Stifel Account Agreement and Disclosure Booklet, which is available at [www.stifel.com/disclosures/account-agreement](http://www.stifel.com/disclosures/account-agreement).

PORTFOLIO SUMMARY	January 31	December 31
Net Cash Equivalents **	44,501.70	33,545.79
Net Portfolio Assets held at Stifel	5,202,839.20	5,209,710.20
Net Portfolio Assets not held at Stifel		
<b>Net Portfolio Value</b>	<b>\$5,247,340.90</b>	<b>\$5,243,255.99</b>
YOUR CHANGE IN PORTFOLIO VALUE	January 31	December 31
Net Cash Flow (Inflows/Outflows) <sup>2</sup>	-28.08	
Securities Transferred In/Out		
Income and Distributions	10,983.99	9,832.37
Change in Securities Value	-6,871.00	4,190.70
<b>Net Change in Portfolio Value</b>	<b>\$4,084.91</b>	<b>\$14,023.07</b>

\*\* See the Stifel Insured Bank Deposit Program Disclosure Statements for additional information.  
<sup>2</sup> Does not include cost or proceeds for buy or sell transactions.

**YOUR ASSET SUMMARY**

	Value on January 31, 2021 (\$)	Percentage of your account
A Net Cash Equivalents**	44,501.70	0.85%
D Fixed Income-Muni	1,921,594.70	36.62%
E Fixed Income-Other	3,281,244.50	62.53%
<b>Total Assets</b>	<b>\$5,247,340.90</b>	<b>100.00%</b>



## ASSET SUMMARY

	Value as of <b>January 31, 2021</b>			% of assets *	Gains/(-)Losses		
	<i>At Stifel</i>	<i>Not at Stifel</i>	<i>Total</i>		<i>Unrealized</i>	<i>Realized</i>	
					<i>This Period</i>	<i>Year-to-date</i>	
Cash							
Cash Sweep**	44,501.70		44,501.70	0.85%			
Margin Balance							
<b>A. Net Cash Equivalents</b>	<b>\$44,501.70</b>		<b>\$44,501.70</b>	<b>0.85%</b>			
<b>B. Equities</b>							
<b>C. Preferreds</b>							
D. Fixed Income-Muni	1,921,594.70		1,921,594.70	36.62%	9,279.59		
E. Fixed Income-Other	3,281,244.50		3,281,244.50	62.53%	73,346.32		
F. Mutual Funds							
G. Unit Investment Trusts							
H. Insurance Products							
I. Alternative Investments							
J. Other Investments							
K. Stifel Smart Rate Program **							
<b>Net Portfolio Assets</b>	<b>\$5,202,839.20</b>	<b>\$0.00</b>	<b>\$5,202,839.20</b>	<b>99.15%</b>	<b>\$82,625.91</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Net Portfolio Value</b>	<b>\$5,247,340.90</b>	<b>\$0.00</b>	<b>\$5,247,340.90</b>	<b>100.00%</b>	<b>\$82,625.91</b>	<b>\$0.00</b>	<b>\$0.00</b>

## INCOME & DISTRIBUTION SUMMARY

	<i>Security Type</i>	<i>Year-to-date</i>	<i>This period</i>
Dividends	Tax-Exempt		
	Taxable		
Interest	Tax-Exempt		
	Taxable	10,983.99	10,983.99
Capital Gain Distributions			
Return of Principal			
Other			
<b>Total Income &amp; Distributions</b>		<b>\$10,983.99</b>	<b>\$10,983.99</b>

## INFORMATION SUMMARY

	<i>Security Type</i>	<i>Year-to-date</i>	<i>This period</i>
Accrued Interest Paid	Tax-Exempt		
	Taxable		
Accrued Interest Received	Tax-Exempt		
	Taxable		
Gross Proceeds			
Federal Withholding			
Foreign Taxes Paid			
Margin Interest Charged		28.08	28.08

\* Please note "% of assets" figures are shown gross of any amounts owed to Stifel and/or net short positions.

\*\* Include balances which are FDIC insured bank deposits, not cash held in your Securities Account and not covered by SIPC.

## ASSET DETAILS

This section shows the cash equivalents and/or securities in your account. Prices obtained from outside sources are considered reliable but are not guaranteed by Stifel. Actual prices may vary, and upon sale, you may receive more or less than your original purchase price. Contact your Financial Advisor for current price quotes. Gain/Loss is provided for informational purposes only. Cost basis may be adjusted for, but not limited to, amortization, accretion, principal paydowns, capital changes, listed option premiums, gifting rules, inheritance step-up, or wash sales. The Gain/Loss information should not be used for tax preparation without the assistance of your tax advisor. Lot detail quantity displayed is truncated to the one thousandth of a share.

## NET CASH EQUIVALENTS

	<i>Current value</i>	<i>Cost Basis</i>	<i>Estimated Annualized Income</i>	<i>Estimated Yield %</i>
STIFEL FDIC INSURED	44,501.70	44,501.70	4.45	0.01%
<b>Total Net Cash Equivalents</b>	<b>\$44,501.70</b>	<b>\$44,501.70</b>	<b>\$4.45</b>	<b>0.01%</b>

### STIFEL INSURED BANK DEPOSIT PROGRAM

Funds deposited through the Stifel Insured Bank Deposit Program (the "Program") may be deposited at multiple banks. The Program's Disclosure Statement is available at [www.stifel.com/disclosures/account-agreement](http://www.stifel.com/disclosures/account-agreement). The deposits are not covered by the Securities Investor Protection Corporation ("SIPC"). Deposits are insured by the FDIC within applicable limits.

Balances in the Program or in any money market fund offered as an available fund for Cash Investment Services at Stifel, subject to applicable limits, can be liquidated upon request and the proceeds returned to your securities account or can be distributed directly to you with the proper withdrawal form on file.

## PORTFOLIO ASSETS - HELD AT STIFEL

<b>Fixed Income-Muni</b>	<i>Symbol/ Bond Rating/ Type</i>	<i>Quantity</i>	<i>Current Price/ Current Value</i>	<i>Average Unit Cost/ Cost Basis</i>	<i>Accrued Income<sup>6</sup></i>	<i>Unrealized Gain/(-)Loss<sup>10</sup></i>	<i>Estimated Annualized Income</i>	<i>Estimated Yield %</i>
OHIO ST WTR DEV AUTH POLLTN CTL REV WTR QUAL B2 BABS B/E TXBL CPN 3.742% DUE 12/01/21 DTD 08/24/10 FC 12/01/10 CUSIP: 67766WQH8 <i>Original Cost: 155,372.00</i>	S&P: AAA Moody: Aaa <b>Cash</b>	150,000	101.7670 152,650.50	101.6691 152,503.68	935.50	146.82	5,613.00	3.68%
NORCO CA CMNTY REDEV AGY SUCCESS AGY REV TAX ALLOC RFDG B B/E TXBL CPN 2.715% DUE 03/01/22 DTD 12/20/17 FC 03/01/18 CUSIP: 655505BJ3 <i>Original Cost: 153,354.50</i>	S&P: AA- <b>Cash</b>	150,000	102.3610 153,541.50	101.3019 151,952.83	1,696.88	1,588.67	4,072.50	2.65%



**ASSET DETAILS (continued)**

**PORTFOLIO ASSETS - HELD AT STIFEL (continued)**

<b>Fixed Income-Muni</b>	<i>Symbol/ Bond Rating/ Type</i>	<i>Quantity</i>	<i>Current Price/ Current Value</i>	<i>Average Unit Cost/ Cost Basis</i>	<i>Accrued Income<sup>6</sup></i>	<i>Unrealized Gain/(-)Loss<sup>10</sup></i>	<i>Estimated Annualized Income</i>	<i>Estimated Yield %</i>
OCEANSIDE CA PENSION OBLIG RFDG REV B/E TXBL CPN 3.839% DUE 08/15/22 DTD 08/11/15 FC 02/15/16 CUSIP: 675371AY4 <i>Original Cost: 104,986.00</i>	S&P: AA+ <b>Cash</b>	100,000	105.2110 105,211.00	103.3614 103,361.40	1,770.21	1,849.60	3,839.00	3.65%
HILLSBOROUGH CNTY FL AVIATION AUTH CUST FAC REV TAMPA INTL B/E TXBL CPN 3.549% DUE 10/01/22 DTD 09/03/15 FC 04/01/16 CUSIP: 432275AE5 <i>Original Cost: 205,191.00</i>	S&P: BBB+ Moody: A3 <b>Cash</b>	200,000	103.3600 206,720.00	101.8460 203,691.95	2,366.00	3,028.05	7,098.00	3.43%
WATAUGA CNTY NC RFDG B/E TXBL CPN 2.330% DUE 06/01/23 DTD 10/02/19 FC 06/01/20 CUSIP: 94109SAT8 <i>Original Cost: 113,363.30</i>	S&P: AA <b>Cash</b>	110,000	102.3700 112,607.00	102.3499 112,584.85	427.17	22.15	2,563.00	2.28%
CONNECTICUT ST SER A B/E TXBL CPN 1.998% DUE 07/01/24 DTD 06/11/20 FC 01/01/21 CUSIP: 20772KJW0 <i>Original Cost: 112,753.90</i>	S&P: A Moody: A1 <b>Cash</b>	110,000	105.3140 115,845.40	102.1268 112,339.46	183.15	3,505.94	2,197.80	1.90%
KANSAS ST DEV FIN AUTH REV ATHLETIC FACS K ST SER B 2 B/E TXBL CPN 4.083% DUE 07/01/24 DTD 03/01/12 FC 07/01/12 CUSIP: 485429MF8 <i>Original Cost: 94,177.35</i>	S&P: A- Moody: A1 <b>Cash</b>	85,000	111.7220 94,963.70	110.3269 93,777.87	289.21	1,185.83	3,470.55	3.65%
MIAMI DADE CNTY FL AVIATION REV RFDG SER B B/E TXBL CPN 2.504% DUE 10/01/24 DTD 08/25/16 FC 10/01/16 CUSIP: 59333PV39 <i>Original Cost: 208,207.00</i>	S&P: A- <b>Cash</b>	200,000	105.5600 211,120.00	103.7352 207,470.37	1,669.33	3,649.63	5,008.00	2.37%

## ASSET DETAILS (continued)

### PORTFOLIO ASSETS - HELD AT STIFEL (continued)

Fixed Income-Muni	Symbol/ Bond Rating/ Type	Quantity	Current Price/ Current Value	Average Unit Cost/ Cost Basis	Accrued Income <sup>6</sup>	Unrealized Gain/(-)Loss <sup>10</sup>	Estimated Annualized Income	Estimated Yield %
SAN DIEGO CA CONVNTN CTR EXPANSION FING AUTH LSE REV RFDG B/E TXBL CPN 1.677% DUE 04/15/25 DTD 07/08/20 FC 10/15/20 CUSIP: 79727LBS7 <i>Original Cost: 173,029.30</i>	S&P: AA- <b>Cash</b>	170,000	100.7820 171,329.40	101.7461 172,968.45	839.43	-1,639.05	2,850.90	1.66%
NEW YORK NY CITY HSG DEV CORP MLTIFAM HSG REV SER E B/E CPN 3.000% DUE 05/01/25 DTD 09/24/14 FC 11/01/14 CALL 05/01/23 @ 100.000 CUSIP: 64972CBF9 <i>Original Cost: 143,952.29</i>	S&P: AA+ Moody: Aa2 <b>Cash</b>	135,000	105.2520 142,090.20	105.4935 142,416.27	1,012.50	-326.07	4,050.00	2.85%
SUFFOLK CNTY NY RFDG SER C AGM B/E TXBL CPN 1.607% DUE 06/15/25 DTD 11/18/20 FC 12/15/20 CUSIP: 86476PE20 <i>Original Cost: 252,280.00</i>	S&P: AA <b>Cash</b>	250,000	100.9260 252,315.00	100.8731 252,182.69	513.35	132.31	4,017.50	1.59%
CLEVELAND OH INCM TAX REV RFDG SUB LEIN SER A 1 B/E TXBL CPN 1.985% DUE 10/01/25 DTD 02/26/20 FC 10/01/20 CUSIP: 186387VE3 <i>Original Cost: 104,395.00</i>	S&P: AA Moody: A1 <b>Cash</b>	100,000	102.4900 102,490.00	104.1724 104,172.43	661.67	-1,682.43	1,985.00	1.94%
STEPHENSON CNTY IL SCH DIST 145 FREEPORT RFDG AGM B/E TXBL CPN 1.750% DUE 10/01/25 DTD 11/24/20 FC 04/01/21 CUSIP: 858892MD1 <i>Original Cost: 103,005.00</i>	S&P: AA <b>Cash</b>	100,000	100.7110 100,711.00	102.8929 102,892.86	325.69	-2,181.86	1,750.00	1.74%
<b>Total Fixed Income-Muni</b>		<b>1,860,000</b>	<b>\$1,921,594.70</b>	<b>\$1,912,315.11</b>	<b>\$12,690.09</b>	<b>\$9,279.59</b>	<b>\$48,515.25</b>	<b>2.52%</b>

Municipal Bonds held may or may not be tax free. Please consult with your tax advisor.



**ASSET DETAILS (continued)**

**PORTFOLIO ASSETS - HELD AT STIFEL (continued)**

<b>Fixed Income-Other</b>	<i>Symbol/ Bond Rating/ Type</i>	<i>Quantity</i>	<i>Current Price/ Current Value</i>	<i>Average Unit Cost/ Cost Basis</i>	<i>Accrued Income<sup>6</sup></i>	<i>Unrealized Gain/(-)Loss<sup>10</sup></i>	<i>Estimated Annualized Income</i>	<i>Estimated Yield %</i>
APPLE INC NOTE CPN 2.850% DUE 05/06/21 DTD 05/06/14 FC 11/06/14 CUSIP: 037833AR1 <i>Original Cost: 254,209.50</i>	S&P: AA+ Moody: Aa1 <b>Cash</b>	250,000	100.7130 251,782.50	100.2353 250,588.25	1,682.29	1,194.25	7,125.00	2.83%
U S TREASURY NOTE CPN 2.625% DUE 05/15/21 DTD 05/15/18 FC 11/15/18 CUSIP: 9128284P2 <i>Original Cost: 253,350.75</i>	Moody: Aaa <b>Cash</b>	250,000	100.7190 251,797.50	100.1952 250,487.97	1,414.02	1,309.53	6,562.50	2.61%
SALLIE MAE BANK SALT LAKE CITY UT CD FDIC #58177 CPN 2.450% DUE 05/17/21 DTD 05/15/19 FC 11/15/19 CUSIP: 7954502W4	<b>Cash</b>	100,000	100.7240" 100,724.00	100.0000 100,000.00	523.56	724.00	2,450.00	2.43%
FEDL NATL MTG ASSN NOTE CPN 2.750% DUE 06/22/21 DTD 06/25/18 FC 12/22/18 CUSIP: 3135G0U35 <i>Original Cost: 255,015.78</i>	S&P: AA+ Moody: Aaa <b>Cash</b>	250,000	101.0450 252,612.50	100.3892 250,972.93	744.79	1,639.57	6,875.00	2.72%
FEDL NATL MTG ASSN NOTE CPN 2.000% DUE 01/05/22 DTD 01/09/17 FC 07/05/17 CUSIP: 3135G0S38 <i>Original Cost: 152,238.52</i>	S&P: AA+ Moody: Aaa <b>Cash</b>	150,000	101.7640 152,646.00	100.5951 150,892.58	216.67	1,753.42	3,000.00	1.97%
PFIZER INC NOTE CPN 2.800% DUE 03/11/22 DTD 03/11/19 FC 09/11/19 CUSIP: 717081ER0 <i>Original Cost: 101,548.00</i>	S&P: A+ Moody: A2 <b>Cash</b>	100,000	102.8170 102,817.00	100.6252 100,625.18	1,112.22	2,191.82	2,800.00	2.72%
U S TREASURY NOTE CPN 2.250% DUE 04/15/22 DTD 04/15/19 FC 10/15/19 CUSIP: 9128286M7 <i>Original Cost: 253,725.75</i>	Moody: Aaa <b>Cash</b>	250,000	102.5700 256,425.00	100.6609 251,652.36	1,684.41	4,772.64	5,625.00	2.19%

**ASSET DETAILS (continued)**

**PORTFOLIO ASSETS - HELD AT STIFEL (continued)**

<b>Fixed Income-Other</b>	<i>Symbol/ Bond Rating/ Type</i>	<i>Quantity</i>	<i>Current Price/ Current Value</i>	<i>Average Unit Cost/ Cost Basis</i>	<i>Accrued Income<sup>6</sup></i>	<i>Unrealized Gain/(-)Loss<sup>10</sup></i>	<i>Estimated Annualized Income</i>	<i>Estimated Yield %</i>
IBM CORP UNSECD NOTE CPN 2.850% DUE 05/13/22 DTD 05/15/19 FC 11/15/19 CUSIP: 459200JX0 <i>Original Cost: 151,274.50</i>	S&P: A Moody: A2 <b>Cash</b>	150,000	103.3290 154,993.50	100.3132 150,469.77	902.50	4,523.73	4,275.00	2.76%
SALLIE MAE BANK SALT LAKE CITY UT CD FDIC #58177 CPN 2.550% DUE 05/16/22 DTD 05/15/19 FC 10/15/19 CUSIP: 7954502X2	<b>Cash</b>	100,000	103.2110" 103,211.00	100.0000 100,000.00	544.94	3,211.00	2,550.00	2.47%
ALLY BANK SANDY UT CD FDIC #57803 CPN 1.850% DUE 08/29/22 DTD 08/29/19 FC 02/29/20 CUSIP: 02007GLJ0	<b>Cash</b>	200,000	102.7880" 205,576.00	100.0000 200,000.00	1,581.37	5,576.00	3,700.00	1.80%
UNITEDHEALTH GRP INC NOTE CPN 2.375% DUE 10/15/22 DTD 10/25/17 FC 04/15/18 CUSIP: 91324PDD1 <i>Original Cost: 153,461.00</i>	S&P: A+ Moody: A3 <b>Cash</b>	150,000	103.5590 155,338.50	101.4716 152,207.34	1,048.96	3,131.16	3,562.50	2.29%
JPMORGAN CHASE & CO SR NOTE CPN 3.200% DUE 01/25/23 DTD 01/25/13 FC 07/25/13 CUSIP: 46625HJH4 <i>Original Cost: 254,432.00</i>	S&P: A- Moody: A2 <b>Cash</b>	250,000	105.6380 264,095.00	100.9759 252,439.68	133.33	11,655.32	8,000.00	3.03%
MORGAN STANLEY BANK NA SALT LAKE CITY UT CD FDIC #32992 CPN 2.650% DUE 01/25/23 DTD 01/25/18 FC 07/25/18 CUSIP: 61747MH46 <i>Original Cost: 101,128.00</i>	<b>Cash</b>	100,000	105.0510" 105,051.00	100.6378 100,637.75	50.82	4,413.25	2,650.00	2.52%

**ASSET DETAILS (continued)**

**PORTFOLIO ASSETS - HELD AT STIFEL (continued)**

<b>Fixed Income-Other</b>	<i>Symbol/ Bond Rating/ Type</i>	<i>Quantity</i>	<i>Current Price/ Current Value</i>	<i>Average Unit Cost/ Cost Basis</i>	<i>Accrued Income<sup>6</sup></i>	<i>Unrealized Gain/(-)Loss<sup>10</sup></i>	<i>Estimated Annualized Income</i>	<i>Estimated Yield %</i>
SIMON PPTY GRP LP NOTE CPN 2.750% DUE 02/01/23 DTD 12/17/12 FC 08/01/13 CALL 11/01/22 @ 100.000 CUSIP: 828807CN5 <i>Original Cost: 151,146.50</i>	S&P: A Moody: A3 <b>Cash</b>	150,000	104.1660 156,249.00	100.5378 150,806.69	2,062.50	5,442.31	4,125.00	2.64%
AMERICAN EXPRESS NATL BK SANDY UT CD FDIC #27471 CPN 1.450% DUE 03/31/23 DTD 03/31/20 FC 09/30/20 CUSIP: 02589AB50	<b>Cash</b>	100,000	102.8690" 102,869.00	100.0000 100,000.00	492.60	2,869.00	1,450.00	1.41%
CAPITAL ONE BANK USA NA GLEN ALLEN VA CD FDIC #33954 CPN 1.450% DUE 04/10/23 DTD 04/08/20 FC 10/08/20 CUSIP: 14042TDF1	<b>Cash</b>	240,000	102.9000" 246,960.00	100.0000 240,000.00	1,105.97	6,960.00	3,480.00	1.41%
MICROSOFT CORP NOTE CPN 2.375% DUE 05/01/23 DTD 05/02/13 FC 11/01/13 CALL 02/01/23 @ 100.000 CUSIP: 594918AT1 <i>Original Cost: 102,711.00</i>	S&P: AAA Moody: Aaa <b>Cash</b>	100,000	104.3790 104,379.00	101.7948 101,794.79	593.75	2,584.21	2,375.00	2.28%
BMW BANK OF NORTH AMER SALT LAKE CITY UT CD FDIC #35141 CPN 1.650% DUE 02/28/24 DTD 02/28/20 FC 08/28/20 CUSIP: 05580AVB7	<b>Cash</b>	200,000	104.4400" 208,880.00	100.0000 200,000.00	1,419.45	8,880.00	3,300.00	1.58%



## ASSET DETAILS (continued)

### PORTFOLIO ASSETS - HELD AT STIFEL (continued)

<b>Fixed Income-Other</b>	<i>Symbol/ Bond Rating/ Type</i>	<i>Quantity</i>	<i>Current Price/ Current Value</i>	<i>Average Unit Cost/ Cost Basis</i>	<i>Accrued Income<sup>6</sup></i>	<i>Unrealized Gain/(-)Loss<sup>10</sup></i>	<i>Estimated Annualized Income</i>	<i>Estimated Yield %</i>
ROGERS MEM HOSP INC BOND CPN 2.383% DUE 07/01/24 DTD 08/28/19 FC 01/01/20 CUSIP: 775200AE8 <i>Original Cost: 104,880.00</i>	S&P: A <b>Cash</b>	100,000	104.8380 104,838.00	104.3229 104,322.89	198.58	515.11	2,383.00	2.27%
<b>Total Fixed Income-Other</b>		<b>3,190,000</b>	<b>\$3,281,244.50</b>	<b>\$3,207,898.18</b>	<b>\$17,512.73</b>	<b>\$73,346.32</b>	<b>\$76,288.00</b>	<b>2.32%</b>
Principal Protected Notes are subject to the credit risk of the issuer. Principal Protected Market Linked CDs are subject to applicable limits.								
<b>Total Portfolio Assets - Held at Stifel</b>			<b>\$5,202,839.20</b>	<b>\$5,120,213.29</b>		<b>\$82,625.91</b>	<b>\$124,803.25</b>	<b>2.40%</b>
<b>Total Net Portfolio Value</b>			<b>\$5,247,340.90</b>	<b>\$5,164,714.99</b>		<b>\$82,625.91</b>	<b>\$124,807.70</b>	<b>2.38%</b>

## FOOTNOTE DEFINITIONS

- <sup>6</sup> **Accrued Income:** Accrued Income amounts are provided for informational purposes only and are not included as part of the Net Portfolio Value. Accrued Income represents the sum of accrued interest and accrued dividends on securities positions, but which Stifel has not yet received. Stifel cannot guarantee the accuracy of the Accrued Income, which may be subject to change. Accrued Income amounts are not covered by SIPC and should not be relied upon for making investment decisions.
- <sup>10</sup> Please note "Unrealized Gain/(-)Loss" does not equal the total current value minus the total cost if any value or cost amounts are missing. Unrealized gains or losses are provided for your information only and should not be used for tax purposes.
- " The price assigned to this instrument may have been provided by a national pricing service and is derived from a 'market-driven pricing model.'  
This price may not be the actual price you would receive in the event of a sale prior to the maturity of the C.D. Additional information is available upon request.



ACTIVITY SUMMARY				CASH EQUIVALENTS		
Type of Activity	Activity	Year-to-date	This period	Cash	Cash Sweep	Margin
	<b>Opening Balance - Net Cash Equivalents</b>		<b>\$33,545.79</b>	<b>\$0.00</b>	<b>\$33,545.79</b>	<b>\$0.00</b>
Buy and Sell Transactions	Assets Bought					
	Assets Sold/Redeemed					
Deposits	Deposits Made To Your Account					
Withdrawals	Withdrawals From Your Account					
Income and Distributions	Income and Distributions	10,983.99	10,983.99	10,983.99		
Cash Sweep Activity	Cash Sweep Activity			-10,955.91	10,955.91	
Margin Interest	Margin Interest Charged	-28.08	-28.08			-28.08
Other	Other Transactions					
Cash Management Activity	Card Activity					
	ACH/ATM Activity					
Checkwriting Activity	Checks You Wrote					
	<b>Closing Balance - Net Cash Equivalents</b>		<b>\$44,501.70</b>	<b>\$28.08</b>	<b>\$44,501.70</b>	<b>-\$28.08</b>
Securities Transferred	Securities Transferred In/Out					

ACTIVITY DETAILS				CASH EQUIVALENTS		
			This period	Cash	Cash Sweep	Margin
	<b>Opening Balance - Net Cash Equivalents</b>		<b>\$33,545.79</b>	<b>\$0.00</b>	<b>\$33,545.79</b>	<b>\$0.00</b>

Income and Distributions							
Date	Activity	Quantity	Description	Total	Cash	Cash Sweep	Margin
1/4/2021	Interest		CONNECTICUT ST SER A B/E TXBL CPN 1.998% DUE 07/01/24 DTD 06/11/20 FC 01/01/21 010121 110,000 CUSIP: 20772KJW0	1,221.00	1,221.00		



**ACTIVITY DETAILS continued**

**CASH EQUIVALENTS continued**

**Income and Distributions continued**

<i>Date</i>	<i>Activity</i>	<i>Quantity</i>	<i>Description</i>	<i>Total</i>	<i>Cash</i>	<i>Cash Sweep</i>	<i>Margin</i>
1/4/2021	Interest		KANSAS ST DEV FIN AUTH REV ATHLETIC FACS K ST SER B 2 B/E TXBL CPN 4.083% DUE 07/01/24 DTD 03/01/12 FC 07/01/12 010121 85,000 CUSIP: 485429MF8	1,735.28	1,735.28		
1/4/2021	Interest		ROGERS MEM HOSP INC BOND CPN 2.383% DUE 07/01/24 DTD 08/28/19 FC 01/01/20 010121 100,000 CUSIP: 775200AE8	1,191.50	1,191.50		
1/5/2021	Interest		FEDL NATL MTG ASSN NOTE CPN 2.000% DUE 01/05/22 DTD 01/09/17 FC 07/05/17 010521 150,000 CUSIP: 3135G0S38	1,500.00	1,500.00		
1/25/2021	Interest		JPMORGAN CHASE & CO SR NOTE CPN 3.200% DUE 01/25/23 DTD 01/25/13 FC 07/25/13 012521 250,000 CUSIP: 46625HJH4	4,000.00	4,000.00		
1/25/2021	Interest		MORGAN STANLEY BANK NA SALT LAKE CITY UT CD FDIC #32992 CPN 2.650% DUE 01/25/23 DTD 01/25/18 FC 07/25/18 012521 100,000 CUSIP: 61747MH46	1,335.89	1,335.89		
1/29/2021	Interest		STIFEL FDIC INSURED BANK DEPOSIT PROGRAM 012921 44,501 CUSIP: 09999844	0.32	0.32		
<b>Total Income and Distributions</b>				<b>\$10,983.99</b>	<b>\$10,983.99</b>		



**ACTIVITY DETAILS continued**

**CASH EQUIVALENTS continued**

**Cash Sweep Activity**

<i>Date</i>	<i>Activity</i>	<i>Description</i>	<i>Total</i>	<i>Cash</i>	<i>Cash Sweep</i>	<i>Margin</i>
1/5/2021	Purchase	STIFEL FDIC INSURED BANK DEPOSIT PROGRAM		-4,147.78	4,147.78	
1/6/2021	Purchase	STIFEL FDIC INSURED BANK DEPOSIT PROGRAM		-1,500.00	1,500.00	
1/26/2021	Purchase	STIFEL FDIC INSURED BANK DEPOSIT PROGRAM		-5,335.89	5,335.89	
1/29/2021	Purchase	STIFEL FDIC INSURED BANK DEPOSIT PROGRAM		-0.32	0.32	
1/29/2021	Sale	STIFEL FDIC INSURED BANK DEPOSIT PROGRAM		28.08	-28.08	
<b>Total Cash Sweep Activity</b>			<b>\$0.00</b>	<b>-\$10,955.91</b>	<b>\$10,955.91</b>	

**Other Margin Interest**

<i>Date</i>	<i>Description</i>	<i>Interest</i>	<i>Cash</i>	<i>Cash Sweep</i>	<i>Margin</i>
01/28/21	DEBIT CHARGE 12/16- 1/18	-28.08			-28.08
<b>Grand Total Margin Interest</b>		<b>-\$28.08</b>			<b>-\$28.08</b>

	<i>This period</i>	<i>Cash</i>	<i>Cash Sweep</i>	<i>Margin</i>
<b>Closing Balance - Net Cash Equivalents</b>	<b>\$44,501.70</b>	<b>\$28.08</b>	<b>\$44,501.70</b>	<b>-\$28.08</b>

## Stifel Insured Bank Deposit Program

Amount(s) listed below include accrued interest in the amount of \$0.32. The rate at month-end was 0.01%.

Description	Location	Previous Month Value	Current Month Value
Stifel Bank and Trust	St. Louis, MO	\$33,545.79	\$33,546.07
JPMorgan Chase Bank NA	Columbus, OH	\$0.00	\$10,955.63
Closing Balance - Stifel Insured Bank Deposit Program			\$44,501.70

Your deposit balances at each Program Bank are eligible for insurance by the FDIC within applicable limits. The deposit balances are not insured by SIPC. Please refer to the Stifel Insured Bank Deposit Program Disclosure Statement and the Stifel Insured Bank Deposit Program for Retirement Accounts Disclosure Statement which are available at [www.stifel.com/disclosures/account-agreement](http://www.stifel.com/disclosures/account-agreement) or from your Financial Advisor.

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# STIFEL

## Certain Definitions

“Stifel” means Stifel, Nicolaus & Company, Incorporated, Member SIPC and NYSE.

“Stifel Banks” means affiliated banks of Stifel, which may include Stifel Bank & Trust, Member Federal Deposit Insurance Corporation (“FDIC”); Stifel Bank, Member FDIC; Stifel Trust Company, National Association, Member FDIC; and Stifel Trust Company Delaware, National Association, Member FDIC. **Unless otherwise specified, products purchased from or held by Stifel in a securities account are not insured by the FDIC, are not deposits or other obligations of the Stifel Banks, are not guaranteed by the Stifel Banks, and are subject to investment risk, including possible loss of the principal.**

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## Account Disclosures

**Errors and Inquiries** – You should review this statement carefully and notify the Manager of the Office servicing your account of anything you believe to be incorrect. Any verbal communications should be re confirmed in writing to protect your rights, including rights under SIPA. All statements furnished to you shall be considered accurate, complete, and acknowledged by you unless you report any inaccuracies to the Manager. Instructions and inquiries should be directed to your Financial Advisor. When making inquiries, please mention your account number. Please notify us promptly of any change of address.

**Investment Objective** – All clients are requested to promptly notify us of any material change in their investment objective or financial situation in order to assist us in maintaining current background and financial information.

**Pricing and Rating of Securities** – The pricing of securities displayed on your statement is derived from various sources and, in some cases, may be higher or lower than the price you would actually receive in the market. If we cannot obtain a price, “N/A” appears. For securities listed on an exchange or trading continually in an active marketplace, the prices reflect market quotations at the close of your statement period. For securities trading less frequently, we rely on third party pricing services or a computerized pricing model, which may not always reflect actual market values. Similarly, some insurance product values provided by outside carriers may be valued as of a date other than the statement date. Bond ratings of securities were obtained from various rating services. There is no guarantee with respect to their accuracy. For current price quotes, please contact your Financial Advisor.

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**Transaction Dates** – All securities transactions are reflected on a trade date basis. Settlement of trades will normally occur in three business days unless stated differently on your trade confirmation. Title to securities sold to you where Stifel has acted as principal shall remain with Stifel until the entire purchase price is received or until the settlement date, whichever is later.

**Custody of Securities** – Securities held by Stifel, Nicolaus & Company, Incorporated for you, but which are not registered in your name, may be commingled with identical securities being held for other clients by our Correspondent, the Depository Trust Company, or in similar systems.

**Assets Held Away** – You may purchase certain assets through Stifel, which will be held at a custodial institution other than Stifel. Where available, we include information about these assets on your statement. The custodial institution is responsible, however, for providing year end tax reporting information (Form 1099) and separate periodic statements, which may vary from the information included on your Stifel statement because of different reporting periods. Your Stifel statements may also reflect other assets “not held” at Stifel, in addition to those held by a custodial institution. The value and nature of these investments is generally provided by you. Stifel does not guarantee the accuracy of the information with respect to the value of these investments as reflected on your statement. Assets held away are not covered by Stifel SIPC.

**Estimated Annual Income and Yields** – Estimated annual income and yields are calculated by annualizing the most recent distribution and do not reflect historical experience or project future results. The yield information for the money market funds is based on historical performance; future yields will fluctuate. These figures have been obtained from sources believed to be reliable, but no assurance can be made as to accuracy. Before investing in any of these funds, carefully read the prospectus, which is available through your Financial Advisor.

**Payment for Order Flow** – In order to access a wide variety of execution venues, the firm does participate in the maker/taker model. Certain exchanges and other trading centers to which the firm routes equities and options orders have implemented fee structures under which broker dealer participants may receive rebates on certain orders. Under these fee structures, participants are charged a fee for orders that take liquidity from the venue, and provided a rebate for orders that add liquidity to the venue. Rebates received by the firm from a venue during any time period may or may not exceed the fees paid by the firm to the venue during that time period. Fees and/or rebates from all venues are subject to change. Stifel will provide customers additional information regarding average net fees/rebates paid/received upon written request. For venues from which Stifel receives a rebate, Stifel is considered to be receiving payment for order flow.

Additional information will be provided upon written request, and certain order routing information is available online at [www.stifel.com/disclosures/best](http://www.stifel.com/disclosures/best) execution. On request of a customer and at no fee, Stifel will disclose to such customer the identity of the venue to which such customer’s orders were routed for execution in the six months prior to the request, whether the orders were directed orders or non directed orders, and the time of the transactions, if any, that resulted from such orders. Orders may be routed and executed internally through Stifel’s trading desk. In such instances, Stifel stands to share in 100% of remuneration received (in the case of orders executed as agent) or profits or losses generated (in the case of orders executed as principal) as a result of internalizing such orders. Customers may mail their inquiries to: Stifel Attn: Equity Trading Compliance, 787 7th Avenue, New York, New York 10019.

**Tax Information** – Although your statement may describe certain items as Federally tax exempt, this is for information purposes only. When reporting your taxes, please rely exclusively on the substitute Form 1099 you will receive from us after year end for your taxable accounts. (For Retirement Accounts, Form 1099R will report distributions from the account rather than income and dividends or proceeds from sales.)

**SIPC Protection** – Stifel is a member of the Securities Investor Protection Corporation (SIPC). SIPC coverage protects securities customers of its members up to \$500,000 (including \$250,000 for claims for cash). An explanatory brochure is available upon request or at [www.sipc.org](http://www.sipc.org), or investors may contact SIPC at (202) 371 8300. Stifel has purchased additional securities coverage of \$149,500,000 and cash coverage of \$900,000 for a total of \$150,000,000 of securities coverage and \$1,150,000 of cash coverage, subject to the terms and conditions of the policy, with an aggregate limit of \$300,000,000. (For more information, visit: [www.stifel.com/disclosures/asset](http://www.stifel.com/disclosures/asset) protection.) This coverage does not protect against market losses and does not cover securities not held by Stifel.

**Margin Accounts** – If you have a margin account, this is a combined statement of your margin account and special memorandum account (“SMA”) maintained for you under Section 220.5 of Regulation T issued by the Board of Governors of the Federal Reserve System. The permanent record of the (“SMA”) as required by Regulation T is available for your inspection upon request. If you have applied for margin privileges and have been approved, you may borrow money from Stifel in exchange for pledging assets in your account as collateral for any outstanding margin loan. The amount you may borrow is based on Regulation T, Stifel’s internal policies, and the value of securities in your margin account. Securities held in a margin account are identified by the word “margin” on your statement. Stifel reserves the right to limit margin purchases and short sales and to alter its margin requirements and due dates for house or other margin calls in accordance with the Firm’s guidelines, market conditions, and regulatory margin requirements.

**Margin Account Interest Charges** – The margin interest period includes the second to last day of the prior statement period through the third day prior to the last day of the current statement period. The margin interest charge is computed by multiplying the rate of interest by the average net daily settled debit balance and a fraction, the numerator of which is the number of days the debit balance existed, and the denominator of which is three hundred sixty (360). The rate of interest is determined by the cost of borrowing money and is subject to change without notice. The average net daily settled debit balance includes any settled credit and settled debit balances in your cash and margin accounts during the period. Please review the “Statement of Credit Terms” you have already received for further information.

# STIFEL

## Account Disclosures Continued

**Late Charges** – If transactions in your account result in a debit balance in your cash account and you do not make payment by the settlement date, you may be subject to interest charges.

**Free Credit Balances** – Customer Free Credit Balances may be used in this Firm's business subject to the limitations of 17CFR Section 240, 15c3 3 under The Securities Exchange Act of 1934. You have the right to receive from us in the course of normal business operations, upon demand, the delivery of: a) Any Free Credit Balances to which you are entitled, b) Any Fully Paid Securities to which you are entitled, c) Any Securities purchased on margin upon full payment of any indebtedness to us. If you participate in Stifel|Advantage or Stifel Prestige® Accounts, the payment to you of a Free Credit Balance may be subject to the cancellation of any commitment made in respect to your account for the payment of checks, ATM Card, or Point of Sale transaction charges, or other debit card transactions.

**Option Accounts** – 1) Commissions and other charges related to the execution of option transactions have been included on confirmations for such transactions, which have already been sent to you, and copies of confirmations are available upon request; 2) should you have any changes in your investment objective or current financial situation, you should advise your investment professional immediately; and 3) assignment notices for option contracts are allocated among client short positions pursuant to an automated procedure that randomly selects from all client short option positions those contracts that are subject to assignment, which includes positions established on the day of assignment. Additional information pertaining to the procedures used for random selection is available upon request.

**Complaints** – Complaints relating to your account(s) may be directed to Stifel, Legal Department, 501 North Broadway, St. Louis, Missouri 63102 or by phoning (800) 488 0970 or (314) 342 2000.

**Lost Certificates** – In the event your statement indicates that securities were delivered out of your account in certificate form and you have not received them, it is understood that you will notify Stifel immediately in writing. If written notification is received within 120 calendar days after the delivery date, as reflected on your statement, the certificate will be replaced free of charge. Thereafter, a fee for replacement may apply.

**Dividend Reinvestment** – (Optional) The dollar amount of Mutual Fund distributions, Money Market Fund income, or dividends on other securities shown on your statement may have been reinvested into additional shares. You will not receive confirmations for these reinvestment transactions. However, information pertaining to these transactions which would otherwise appear on confirmations will be furnished to you upon written request. In dividend reinvestment transactions, Stifel may act as your agent and receive payment for order flow. The source and nature of such payment will be furnished to you upon written request to Stifel or your introducing firm. If Stifel is currently a market maker in the eligible security, Stifel will purchase, as principal for you, additional shares at the opening market price.

**Stifel Information** – A Statement of Financial Condition of Stifel, Nicolaus & Company, Incorporated is available for your inspection at any of our offices, or a copy will be mailed to you upon request.

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## Notification of Change in Circumstances and Availability of Investment Advisory Disclosure Brochures –

In the event that there are any material changes in your financial situation, investment objective(s), risk tolerance, or instructions regarding your account(s), please promptly report such changes to your financial advisor to ensure that your investment advisory accounts are being managed based on the most current information. You should review Stifel's Form ADV Part 2A (Disclosure Brochure) for information and disclosures relating to Stifel's investment advisory services (available at: [www.stifel.com/disclosures/investment advisory services/program disclosures](http://www.stifel.com/disclosures/investment%20advisory%20services/program%20disclosures)), including (but not limited to) a discussion of the various conflicts of interest to which our firm may be subject in the provision of investment advisory services to you.





COUNTY OF ORANGE  
**OFFICE OF THE TREASURER-TAX COLLECTOR**

Shari L. Freidenrich, CPA, CCMT, CPFA, ACPFIM  
 P. O. BOX 4515  
 SANTA ANA, CA 92702-4515



[ocgov.com/ocinvestments](http://ocgov.com/ocinvestments)  
 January 31, 2021

**ORANGE COUNTY MOSQUITO AND VECTOR CONTROL DISTRICT**

Attn: Richard Howard, District Manager  
 13001 Garden Grove Blvd.  
 Garden Grove, CA 92843

**Fund Number :** XXXXXXXXXX

**JANUARY 2021 STATEMENT**

**INVESTMENT BALANCE IN OCIP**

**Transactions**

<u>Transaction Date</u>	<u>Transaction Description</u>	<u>Authorized Signer</u>	<u>Amount</u>
01/01/2021	December 2020 Investment Admin Fee		\$ (86.64)
01/29/2021	October 2020 Interest Paid		\$ 1,401.44

**Summary**

Total Deposit:	\$ 1,401.44	Beginning Balance:	\$ 1,726,288.52
Total Withdrawal:	\$ (86.64)	Ending Balance:	\$ 1,727,603.32

**ACCRUED INVESTMENT INCOME**

<u>Description</u>	<u>Amount</u>
November 2020 Interest Accrued	\$ 1,277.04
December 2020 Interest Accrued	\$ 1,125.78
Total	<u>\$ 2,402.82</u>

January 2021 Interest to be accrued in February 2021 \$ 1,020.32



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

February 22, 2021

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

ORANGE COUNTY VECTOR CONTROL DISTRICT

DIRECTOR OF ADMINISTRATIVE SERVICES  
 13001 GARDEN GROVE BLVD  
 GARDEN GROVE, CA 92843

[Tran Type Definitions](#)

Account Number: XXXXXXXXXX

January 2021 Statement

Effective Date	Transaction Date	Tran Type	Confirm Number	Web Confirm Number	Authorized Caller	Amount
1/15/2021	1/14/2021	QRD	1663936	N/A	SYSTEM	9,510.22

**Account Summary**

Total Deposit:	9,510.22	Beginning Balance:	6,356,854.49
Total Withdrawal:	0.00	Ending Balance:	6,366,364.71



# ORANGE COUNTY MOSQUITO AND VECTOR CONTROL DISTRICT

March 18, 2021

## AGENDA REPORT

### AGENDA ITEM F.1

**Prepared By:** Rick Howard, District Manager  
**Submitted By:** Rick Howard, District Manager

#### Agenda Title:

Discuss 1821 E. Dyer Road, Santa Ana, CA 92705 facility as a suitable District facility for District relocation

#### Recommended Action:

As necessary

#### Executive Summary:

Staff and the Board's Budget and Finance and Building Property and Equipment Committees have been working on a District relocation project since late 2017. At the December 2019 Board of Trustees meeting, the Board voted to seek new facilities to house District facilities for future operations. Due to Covid-19, that project was somewhat delayed, however, staff continued to work with the project's consultant, Kosmont Companies, to attempt to identify and locate potential properties that would meet our unique needs.

In December 2020, Kosmont presented a potential site that could possibly meet the District's needs for long term facilities, allowing for moderate growth while continuing to meet the needs of Orange County residents for generations to come.

The property in question is located at 1821 East Dyer Road in Santa Ana. Staff has visited the site on two occasions, and the Joint Committee has also visited the site.

The District Manager and project team will present the property to the full Board at the March 2021 meeting.

Attached, please find the following documents to familiarize yourself with the project history and efforts that have been completed to date:

- 1) The first document to review would be the document named "LPA 18\_0523 OCVector Program Exhibit". This is the space plan as identified by LPA with input from staff and the Committees.
- 2) The second document to review is named "LPA 18\_0910 OCVector Summary Presentation". This provides adjacency plans based upon the space plan as noted above.
- 3) The third document to review is named "LPA 19\_0410 OCVector Board Presentation". This presentation provides site plans for a potential facility located on the current site.
- 4) The fourth document to review is named "OCMVCD HQ Asset Strategy 7-2019". This is the Kosmont and Associates project study and it evaluated all potential options for new District facilities.

5) The fifth document to review is named "Building Move AR 12192019 Final Draft". This document summarizes all of the above and the entire project as it was presented to the Board in December 2019.

**Strategic Plan Compliance:**

**Fiscal Impact:** None at this time

**Amount Requested \$ N/A**

**Sufficient Budgeted Funds Available:**

**Category: Pers. Optg. Cap. -or- CIP# Fund#**

**Previous Relevant Board Actions for This Item:**

December 19, 2019 Board action to relocate existing District facilities (report attached)

**Exhibits:**

As noted above:

**Exhibit A:** LPA 18\_0523 OCVector Program Exhibit

**Exhibit B:** LPA 18\_0910 OCVector Summary Presentation

**Exhibit C:** LPA 19\_0410 OCVector Board Presentation

**Exhibit D:** OCMVCD HQ Asset Strategy 7-2019

**Exhibit E:** Building Move AR 12192019 Final Draft

**ORANGE COUNTY MOSQUITO AND VECTOR CONTROL DISTRICT**  
Space Requirements

Executive Services		Space		Required			Notes	Name
		code	square feet	Staff	Qty	Sq.Ft.		
<b>Private Offices</b>								
	Executive VP	Private Office - A	300	1	1	300		
	Staff	Private Office - B	225	1	1	225		
	Future Office	Private Office - B	225		1	225	To be used as a conference room until private office space is needed.	
<b>Open Work Area and Cubicles</b>								
<b>Other Rooms and Areas</b>								
	Reception						See shared "reception"	
	Executive Services File Storage/ Layout Space	Allow	250		1	250	Have two large fire safes to be relocated. Require area to put together Reports for Board Meetings.	
	Board Room	Allow	4,000		1	4,000	Seat (150), Should have A/V capability, acoustic concerns, Use for employee all hands meetings and training. Entrance near front of building. Quantity includes 35 trustees + staff+public viewing. Space can be separated by lobby from other building spaces. Arrangement similar to council chambers. Services for webinars 2x/month & computer training. Set up room with tables and laptops.	
	Executive meeting					0	See shared "large conference - A"	
	Small Conference	Allow	360		1	360	Seat (8)	
	Subtotal usable sf / staff			<b>2</b>		<b>5,360</b>		
	Unit Circulation	Circulation	35%			1,876	Circulation/wall thickness/misc areas	
	<b>Total Net</b>			<b>2</b>		<b>7,236</b>		

Locate near building entry and board room.

**ORANGE COUNTY MOSQUITO AND VECTOR CONTROL DISTRICT**  
Space Requirements

Administration Services	Space		Required			Notes	Name
	code	square feet	Staff	Qty	Sq.Ft.		
<b>Private Offices</b>							
	Administrative Director	Private Office - B	225	1	1	225	
	Senior Accounting	Private Office - C	150	1	1	150	
	Accounting Specialist	Private Office - C	150	1	1	150	
	HR Manager	Private Office - B	225	1	1	225	
	HR Administrative Assistant	Private Office - C	150	1	1	150	
	Private Office	Private Office - C	150		2	300	For future growth
<b>Open Work Area and Cubicles</b>							
	Open Workstation	Workstation	64		2	128	For future growth
<b>Other Rooms and Areas</b>							
	Records Storage (Finance & HR)	Allow	200		1	200	Relocate fire safe for blank checks & payroll. Provide printer.
	HR Conference	Allow	200		1	200	Seat (2-4)
	HR waiting Area	Allow	100		1	100	Seat (2-4)
	Training					0	See shared "large conference - A"
	Large Conference					0	See shared "large conference - B"
	Subtotal usable sf / staff			5		1,828	
	Unit Circulation	Circulation	35%			640	Circulation/wall thickness/misc areas
	<b>Total Net</b>			<b>5</b>		<b>2,468</b>	

Required locked storage within HR Suite and Accounting Suite. As well as locks on Offices. OCMVC has large amount of seasonal staff that creates additional administrative work during this season using the same amount of admin. Staff. Department works collaboratively with each other with some dedicated quiet area.

**ORANGE COUNTY MOSQUITO AND VECTOR CONTROL DISTRICT**  
Space Requirements

IT / Communications	Space		Required			Notes	Name
	code	square feet	Staff	Qty	Sq.Ft.		
<b>Private Offices</b>							
Communications Director	Private Office - B	225	1	1	225		
IT Manager	Private Office - B	225	1	1	225		
IT Tech	Private Office - C	150	1	1	150		
Public Outreach Coordinator	Private Office - C	150	1	1	150		
Private Office	Private Office - C	150		2	300	For future growth	
<b>Open Work Area and Cubicles</b>							
Education Coordinator	Workstation	64	1	1	64		
Communication Specialist	Workstation	64	1	1	64		
Open Workstation	Workstation	64		1	64	For future growth	
Outreach Education Assistant	Workstation	64	1	1	64		
Customer Service Representative	Reception	120	2	1	120	District's receptionist, Delivery area, laptop storage, locate next to reception waiting area and mailroom.	
IT Specialists	Workstation	64	1	1	64		
IT Coordinator	Workstation	64	1	1	64		
Open Workstation	Workstation	64		1	64	For future growth	
<b>Other Rooms and Areas</b>							
Mailroom	Allow	225		1	225	Locate near reception, mailslots, shipping and receiving.	
Dedicated Server Room	Allow	625		1	625	(3) 4 post racks, movable cart, KVM, security equipment, 24/7 cooling required, secured location in building. Possible connect to generator or include UPS. Locate near IT, key card access.	
IT - Staging	Allow	200		1	200	Provide bench table with electrical and data wire mold at countertop height.	
IT- Storage	Allow	100		1	100	(10) racks with electrical on each wall. Confirm racks is open shelving?	
Communication Outreach - Storage	Allow	550		1	550	Secured, Dedicated for portable tables, folding chairs, (5) pop up canopies, printed material, (2) large inflatable mosquitos (weigh 150 pounds), (10) industrial shelving units, dolly and mobile cart storage, give aways, banners, stands. Plotter, outreach material storage, work counter for education/outreach programs. Locate near exterior door for easy transportation of material to transportation for event.	
Subtotal usable sf / staff			11		3,318		
Unit Circulation		Circulation	35%		1,161	Circulation/wall thickness/misc areas	
<b>Total Net</b>			<b>11</b>		<b>4,479</b>		

Locate near building entry and central to staff for support. Two dedicated fax machines secured correspondence ie.

**ORANGE COUNTY MOSQUITO AND VECTOR CONTROL DISTRICT**  
Space Requirements

Scientific Technical Services (STS)	Space		Required			Notes	Name
	code	square feet	Staff	Qty	Sq.Ft.		
<b>Private Offices</b>							
Director	Private Office - B	225	1	1	225		
Biologist	Private Office - C	150	1	1	150	Locate near map room	
Vector Ecologist, GIS/Mapping	Private Office - C	150	1	1	150	Locate near map room	
Vector Ecologist	Private Office - C	150	2	2	300		
Lab Specialist	Private Office - C	150	1	1	150	No door/Open Reception	
Future	Private Office - C	150		3	450	Open office for future staff	
<b>Fish</b>							
Biologist Office - Fisheries	Private Office - C	150	1	1	150	Locate near indoor fish rearing facility	
Workstation Main Area	Allow	64		3	192	(3) cubicles	
Indoor Fish Rearing Facility	Allow	3000		1	3,000	locate near outdoor ponds	
Fish Quarantine	Allow	150		1	150		
Workshop	Allow	200		1	200		
Storage	Allow	150		1	150		
Outdoor Fish Ponds					0	See site "Fish Ponds"	
<b>Microbiology Lab</b>							
Microbiologist	Private Office - C	150	1	1	150	Locate near microbiology lab area	
Workstation Main Area	Allow	64		3	192	(3) cubicles	
Clean Room	Allow	450		1	450	(3) seats	
Anti-Room/Storage	Allow	50		1	50	Storage of small containers, gloves, lab supplies	
Dirty Room	Allow	450		1	450	(3) seats	
Darkroom/PCR	Allow	100		1	100		
Media	Allow	450		1	450	(3) seats	
<b>Insectary</b>							
Workstation Main Area	Allow	64		3	192	(3) cubicles	
Vestibule	Allow	80		1	80	Provide between workstation and rearing rooms	
Rearing Room-1	Allow	115		1	115		
Rearing Room-2	Allow	115		1	115		
<b>General Lab</b>							
Operations Clerk	Workstation	64	1	1	64		
Part-Time Staff	Workstation	64		10	640	Not part of overall staff count, open space	
Open Workstation	Allow	25		4	100	Data Entry	
Open Workstation	Workstation	64		2	128	Space for visiting scientist and other short-term help.	
Library	Allow	150		1	150	Dedicated space for reference books and journals.	
Collection Room/Storage	Allow	150		1	150		
						Adjacent to outside access	
<b>Specimen Intake Area</b>							
Tech Drop-off	Allow	150		1	150		
Traps Storage	Allow	150		1	150		
Dry Ice Storage	Allow	10		1	10	Two section reach-freezer	
Refridgerator and Freezer	Allow	120		1	120	Refridgerator and freezer	
Bio-Hazard Storage	Allow	60		1	60		
<b>Pathology Lab</b>							
Workstation Main Area	Allow	64		3	192	(3) cubicles	
Necropsy Room	Allow	225		1	225	(3) seats	
pesticide Assay Room	Allow	150		1	150	(2) seats	
<b>Other Rooms and Areas</b>							
Map Room	Allow	225		1	225	Room for a plan desk and small plotter	
Lab Shop	Allow	300		1	300		
Tool Storage	Allow	150		1	150		
Generator						See site "Generator"	
Outdoor Intake						See site "outdoor intake"	
Subtotal usable sf / staff			<b>9</b>		<b>10,575</b>		
Unit Circulation	Circulation	35%			3,701	Circulation/wall thickness/misc areas	
<b>Total Net</b>			<b>9</b>		<b>14,276</b>		

Can be located away from the Public Entry. Require wall space for GIS Mapping in P.O. as well as Compliance Map Display in P.O. Adjacent to Operations and Communications. Carrie should be located near Testing I.D. area. Require Needle and syringe disposal area. Storage for disposable gloves and bio-hazard waste. Require special Mechanical concerns with Negative Airpressure, etc.



**ORANGE COUNTY MOSQUITO AND VECTOR CONTROL DISTRICT**  
Space Requirements

Operations		Space		Required		Notes	Name
		code	square feet	Staff	Qty		
<b>Private Offices</b>							
	Director of Operations	Private Office - B	225	1	1	225	
	Building Maintenance Coordinator	Private Office - C	150	2	1	150	Shared office with (1) additional staff
	IVM Compliance Coordinator	Private Office - C	150	1	1	150	
	Urban Water Compliance Planner	Private Office - C	150	1	1	150	
	GIS Coordinator	Private Office - C	150	1	1	150	
	Operations Specialist	Private Office - C	150	1	1	150	No door
	Senior Vector Control Inspector III	Private Office - C	150	1	1	150	
	Vector Control Inspector III	Private Office - C	150	7	8	1,200	(1) future
	Door To Door	Private Office - C	150	1	1	150	
<b>Open Work Area and Cubicles</b>							
	Vehicle Maintenance Coordinator	Workstation	64	1	1	64	
	Vehicle Maintenance Mechanic	Workstation	64	1	1	64	
	Vehicle Maintenance Staff	Workstation	64	1	1	64	
	Vector Control Inspector II	Workstation	64	21	21	1,344	
	Operations Clerk	Workstation	64	1	1	64	
	Growth	Workstation	64		5	320	(5) future
<b>Seasonal</b>							
	Spray Route	Allow	12		10	120	worksurface, benching type
	Special Services - Flood Control	Allow	12		12	144	worksurface, benching type
	Special Services - Underground	Allow	12		10	120	worksurface, benching type
	Special Services - Freeway	Allow	12		4	48	worksurface, benching type
	Special Services - Helpers	Allow	12		5	60	worksurface, benching type
	Door To Door	Allow	12		16	192	worksurface, benching type
	Red Imported Fire Ants (R.I.F.A)	Allow	12		14	168	worksurface, benching type
	Future	Allow	12		10	120	(10) future
<b>Men's Locker Room</b>							
	lockers	Allow	8		110	880	12" wide half height lockers, 10 STS lockers
	Uniform Exchange Area	Allow	80		1	80	Clean uniform storage area and laundry cart storage area for outside laundry services. Should have convenient exterior access. Provide separate seasonal storage
	Shower - Accessible	Allow	35		1	35	Individual stalls
	Shower - Standard	Allow	20		8	160	Individual stalls
	Bathroom Stall - Accessible	Allow	45		1	45	
	Bathroom Stall - Standard	Allow	30		5	150	
	Urinal	Allow	20		4	80	
	Sink	Allow	15		4	60	
<b>Women's Locker Room</b>							
	lockers	Allow	8		25	200	12" wide half height lockers, 10 STS lockers
	Uniform Exchange Area	Allow	30		1	30	Clean uniform storage area and laundry cart storage area for outside laundry services. Should have convenient exterior access.
	Shower - Accessible	Allow	35		1	35	Individual stalls
	Shower - Standard	Allow	20		5	100	Individual stalls
	Bathroom Stall - Accessible	Allow	45		1	45	
	Bathroom Stall - Standard	Allow	30		4	120	
	Sink	Allow	15		4	60	
<b>Other Rooms and Areas</b>							
	Large Conference					0	See shared "large conference - A"
	Mudroom / Bootwash	Allow	150		1	150	
	Wood Shop	Allow	500		1	500	Include Table Saw, Band Saw, Radial Saw. Locate near vehicle maintenance.
	Storage	Allow	120		1	120	Lockable store janitorial supplies, restroom supplies.
	Safety Supply Storage	Allow	120		1	120	Locate near ice storage.
	Laundry	Allow	80		1	80	
	Ice Storage	Allow	40		1	40	
	Waiting Area	Allow	80		1	80	Seat (3)
	Subtotal usable sf / staff						
					41	8,537	
	Unit Circulation	Circulation	35%			2,988	Circulation/wall thickness/misc areas
	<b>Total Net</b>				<b>41</b>	<b>11,525</b>	

Field work for Control of Vectors, Building maintenance, Field operations. Responsible for vehicle maintenance, storage. Locate near STS and IT.

**ORANGE COUNTY MOSQUITO AND VECTOR CONTROL DISTRICT**  
Space Requirements

Shared	Space		Required			Notes	Name
	code	square feet	Staff	Qty	Sq.Ft.		
<b>Other Rooms and Areas</b>							
	Reception Waiting Area	Allow	200		1	200	Seat (4-6), locate near entry and Board Room. Would like front entry secure with possible camera/buzzer connected to front desk receptionist for secured access. Display for Vector Information Brochures. Visual Display story of "who is OCMVC". Floor area for public viewing of board meetings with audio visual screens and speakers.
	Demonstration Space	Allow	1,000		1	1,000	exhibit space adjacent to reception waiting
	Conference - A	Allow	550		1	550	Video conference, for staff meetings, media interviews, presentations.
	Conference - B	Allow	500		4	2,000	Video conference
	Copy Room	Allow	225		1	225	
	Break Room	Allow	960		1	960	Seats (24), refrigerator, microwave, sink, disposal, coffee, vending. Provide additional outdoor space if it can be properly located away from traffic noise.
	Public Restrooms	Allow	64		4	256	Locate near reception and Boardroom, (4) single accomodation
	Staff Restrooms	Allow	64		4	256	(4) single accomodation
	Coffee Area	Allow	40		1	40	Locate near reception and Boardroom
	Wellness Room	Allow	150		2	300	Include lounge chair, dimmable lights, small sink, undercounter refrigerator
	Janitorial	Allow	60		1	60	
	Subtotal usable sf / staff			<b>0</b>		<b>5,847</b>	
	Unit Circulation	Circulation	35%			2,046	Circulation/wall thickness/misc areas
	<b>Total Net</b>			<b>0</b>		<b>7,893</b>	

**ORANGE COUNTY MOSQUITO AND VECTOR CONTROL DISTRICT**  
Space Requirements

Parking/Site Components	Space		Required			Notes	Name
	code	square feet	Staff	Qty	Sq.Ft.		
<b>Site Program Components</b>							
Fish Ponds	Allow	1,640		5	8,200	Existing approx 8,200sf area, Operations manages. Take current 10 ponds and reduce quantity to fewer and larger ponds.	
Raceway Tanks	Allow	60		5	300	Existing approx 300sf area, Adjacent to fish ponds. Include shade cover for all raceway tanks.	
Concrete Staging	Allow	100		1	100	Area near ponds/wild animal area	
Outdoor Intake	Allow	100		1	100	Outdoor specimen and spoodge drop-off, locate adjacent to STS specimen intake area	
Trash Enclosure	Allow	400		1	400	Accommodate (3) lare gins. Include separate recycle bin area in enclosure. Pick up is 3-4 days per week. Locate outside secure area.	
Generator	Allow	300		1	300	Locate near Scientific Technical Services. Serves labs Hepa filter and freezers, also serves server room.	
Vehicle Maintenance	Allow	500		3	1,500	Tall ceiling height to accommodate Lifts, compressed air, 240 V. power.	
Car Wash Bays	Allow	700		6	4,200		
Chemical Storage	Allow	1,000		1	1,000	Separate structure, (3) bays: concentrated liquids,gases, pellet poisons. Locate away from public area.	
Storage Unit	Allow	100		1	100	Exterior storage unity for emergency supplies.	
Demonstration Space	Allow	200		1	200	Outdoor demonstration space, in public area	
Subtotal usable sf					<b>16,400</b>		
<b>Parking</b>							
Indoor Vehicle Storage	Allow	425		120	51,000	Includes unit circulation, 10'x20' stall, existing quantity (97)	
Communications Van	Allow	425		2	850	Includes unit circulation, 10'x20' stall	
Communications 15 Passenger	Allow	500		1	500	Includes unit circulation, 12'x25' stall	
Visitor Parking	Allow	171		12	2,052	Unsecured 9'x19' stall	
Employee Parking (full-time)	Allow	171		68	11,628	Secured 9'x19' stall	
Employee Parking (part-time)	Allow	171		20	3,420	Secured 9'x19' stall. Part-time staff for STS.	
Employee Parking (seasonal)	Allow	171		80	13,680	Secured 9'x19' stall	
Subtotal usable sf					<b>83,130</b>		
<b>Circulation and Site Components</b>							
Site Circulation/Roadway	Allow	112,408		1	112,408	Vehicular circulation, pedestrian circulation, landscape	
Setback	Allow	35,000		1	35,000	15' setback, landscape	
Subtotal usable sf					<b>147,408</b>		
Total Parking Stalls				<b>303</b>			
Total Net					<b>246,938</b>		

**Additional Notes:**

Security requirements

Exterior Cameras at all parking lot entrances, building entrances, buzzer at front entry for access, card key access to building entrances. Increase perimeter level of security (possibly block)

Site Requirements

Public area should accommodate box truck and oversized vehicle deliveries. Secure area needs to accommodate 40' delivery truck, no loading dock required.

**ORANGE COUNTY MOSQUITO AND VECTOR CONTROL DISTRICT**  
Space Requirements Summary

Departments	Area (square feet)	Staff			Notes
		Full Time	Part Time	Seasonal	
<b>Executive Services</b>					
Subtotal usable sf / staff	7,236	2			
<b>Administrative Services</b>					
Subtotal usable sf / staff	2,468	5			
<b>IT-Communication</b>					
Subtotal usable sf / staff	4,479	11			
<b>STS</b>					
Subtotal usable sf / staff	14,276	9	20		
<b>Operations</b>					
Subtotal usable sf / staff	11,525	41		71	
<b>Shared</b>					
Subtotal usable sf / staff	7,893				
<b>Site</b>					
Subtotal usable sf / staff	246,938				
<b>Total Required</b>	<b>294,816</b>	<b>68</b>	<b>20</b>	<b>71</b>	

Parcel	Area (square feet)	Notes
APN 23111101	88,443	Commercial building site area
APN 23111102	47,401	Laboratory building site area
APN 23111103	93,759	Administration building site area
<b>Total Site Area Available</b>	<b>229,603</b>	

Existing Building	Area (square feet)	Notes
Administration	7,040	
Laboratory	5,300	
Vehicle Maintenance	4,070	
Pesticide Shed	770	
Storage/Shop/Carwash	2,750	
Covered Parking/Storage	18,830	
Commercial Building	35,420	
<b>Total Building Area Available</b>	<b>74,180</b>	

**LPA**

**Orange County Mosquito and  
Vector Control District**

September 11, 2018



**Orange County**  
**Mosquito and Vector Control District**

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- 01** Program
- 02** Adjacency Diagram
- 03** Site Plan Study



**Orange County**  
**Mosquito and Vector Control District**

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# Program

# Summary

- **Site Security**
  - Time to secure site
  - Secure vs. Public
  - Overall site security
- **Space**
  - Undersized private offices
  - Undersized work areas
- **Storage Needs**
  - Lacking (all departments)
  - Location
- **Adjacencies**
  - Departments
  - Inefficient
- **Support Spaces**
  - Undersized (conference room, break room, etc.)
- **Growth**
  - No room to expand
- **Parking**
  - Can't accommodate temp staff
  - Shortage of visitor parking
  - Board nights (send staff home)
- **Building Area**
  - Available (74,180 sf)
  - Needed (107,000 sf)
- **Site Area**
  - Available (229,603 sf)
  - Needed (294,816 sf)

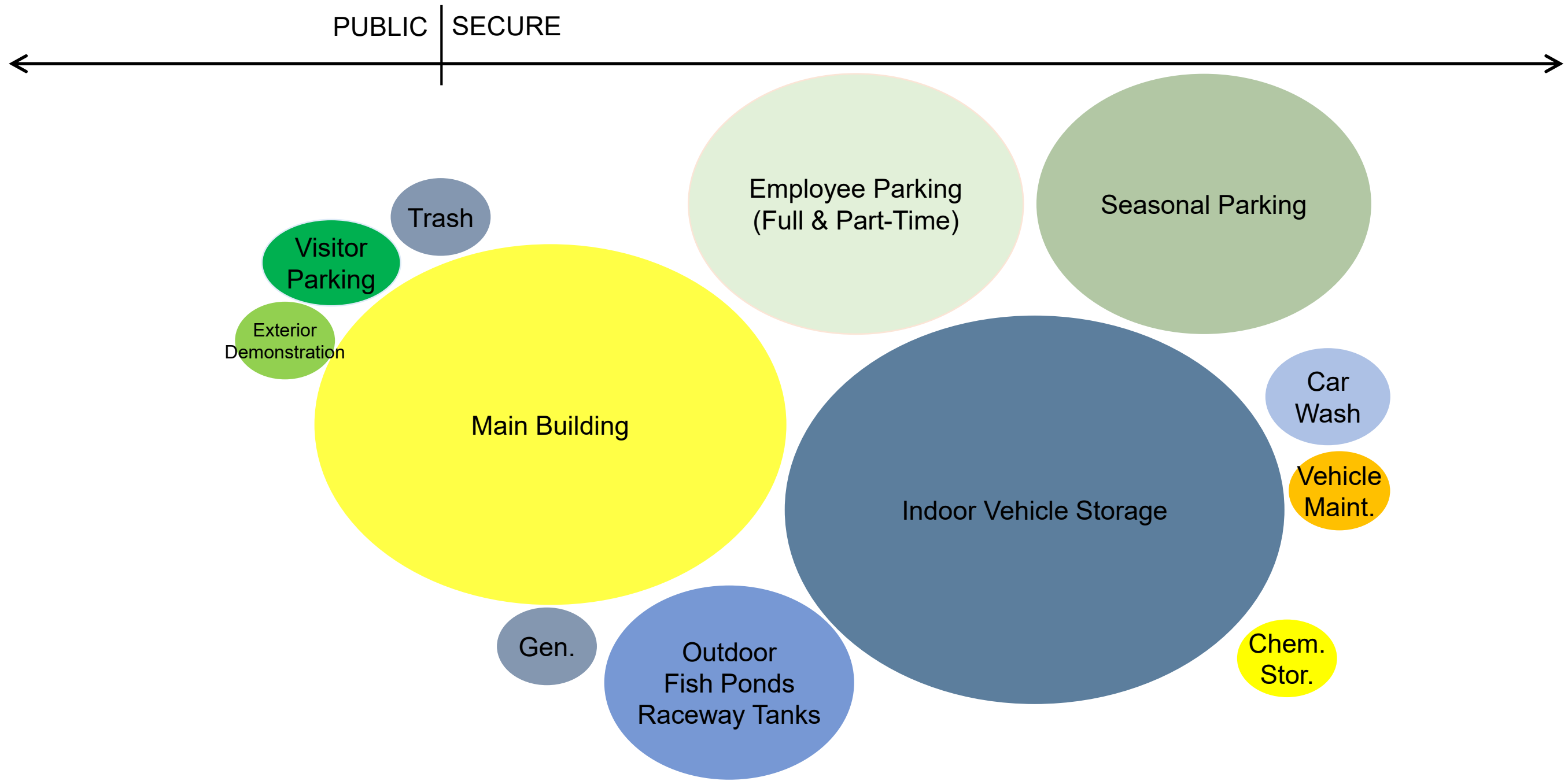




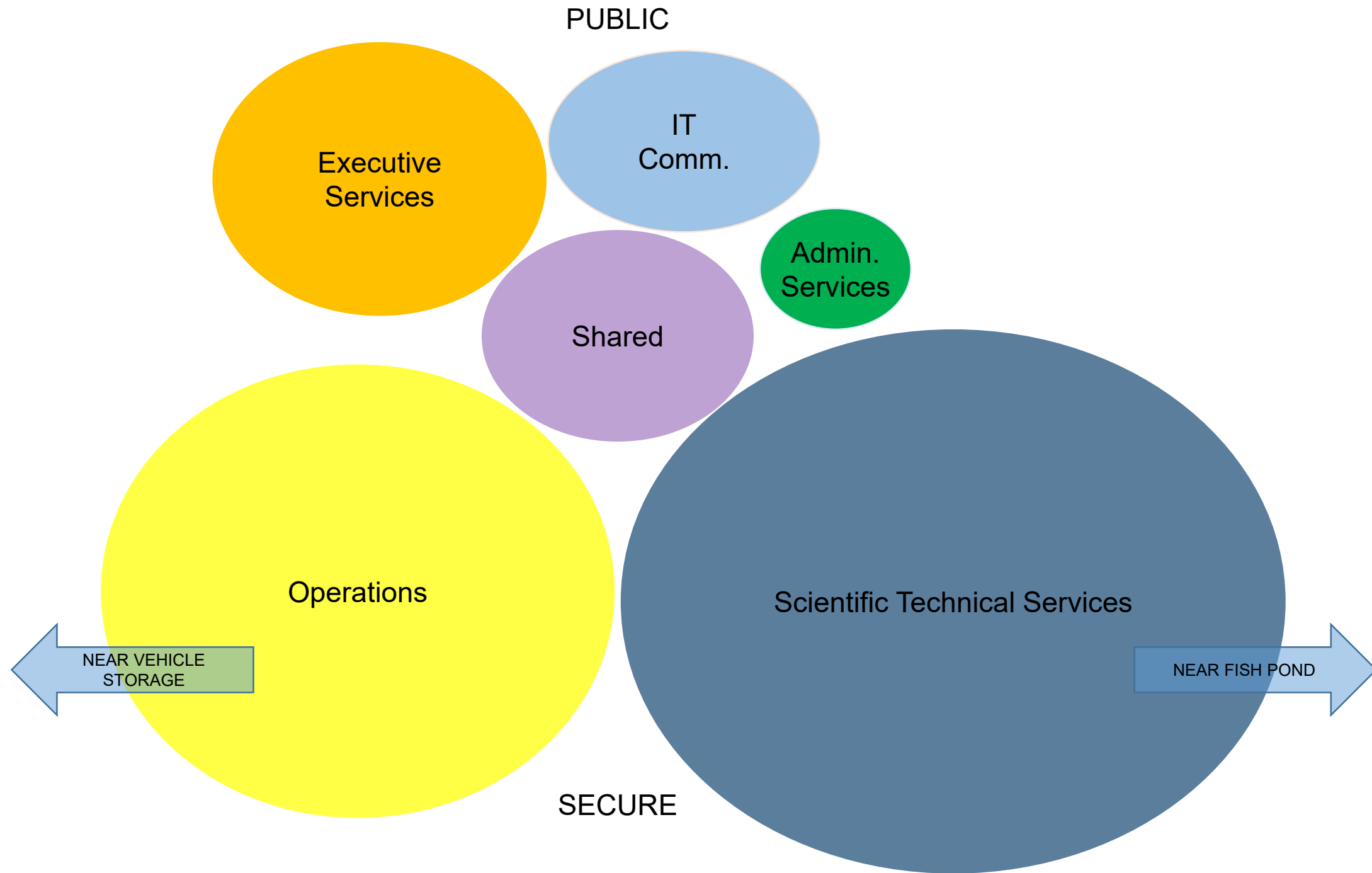
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**Mosquito and Vector Control District**

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# Adjacency Diagram



# Adjacency Diagram (Site Components)



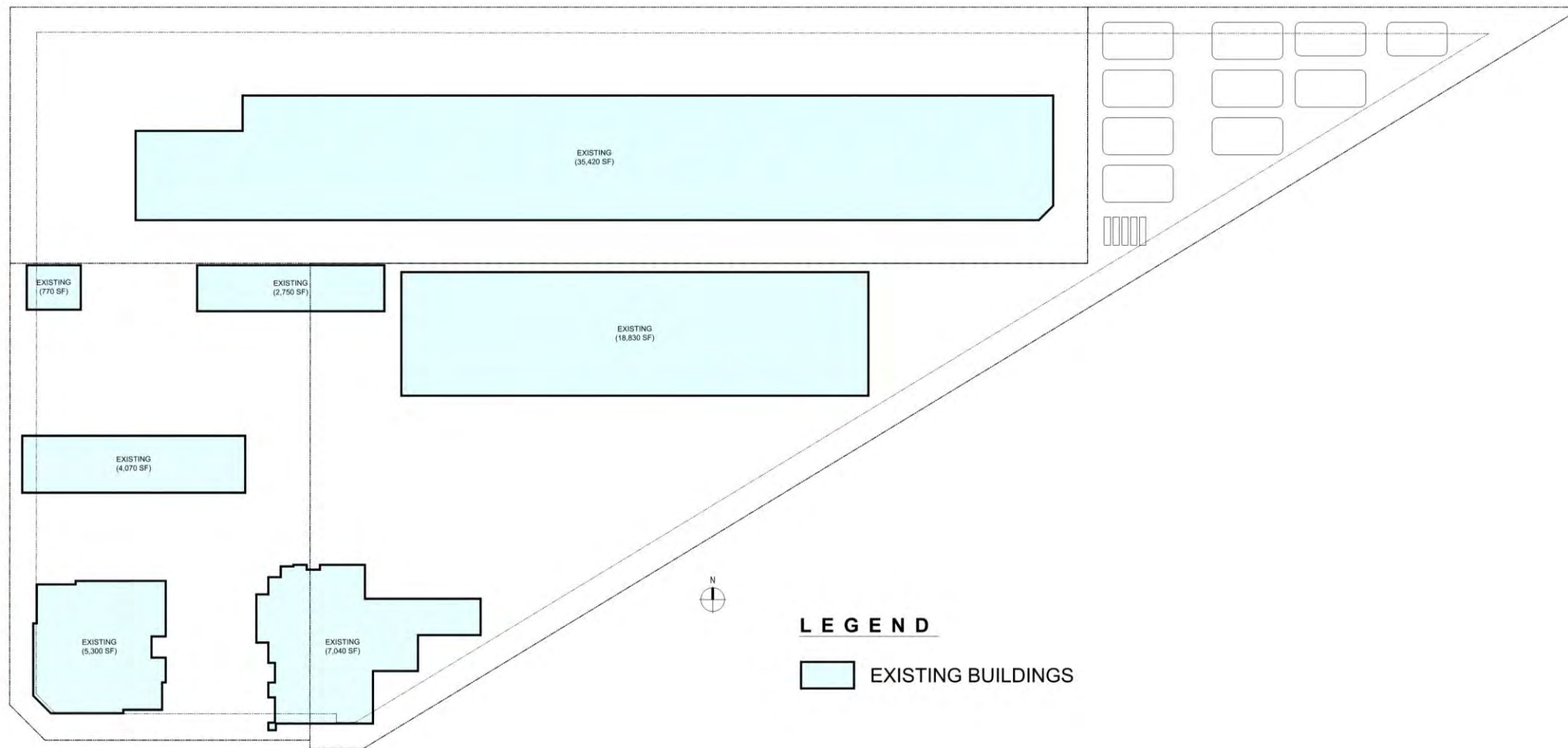
# Adjacency Diagram (Building Components)



**Orange County**  
**Mosquito and Vector Control District**

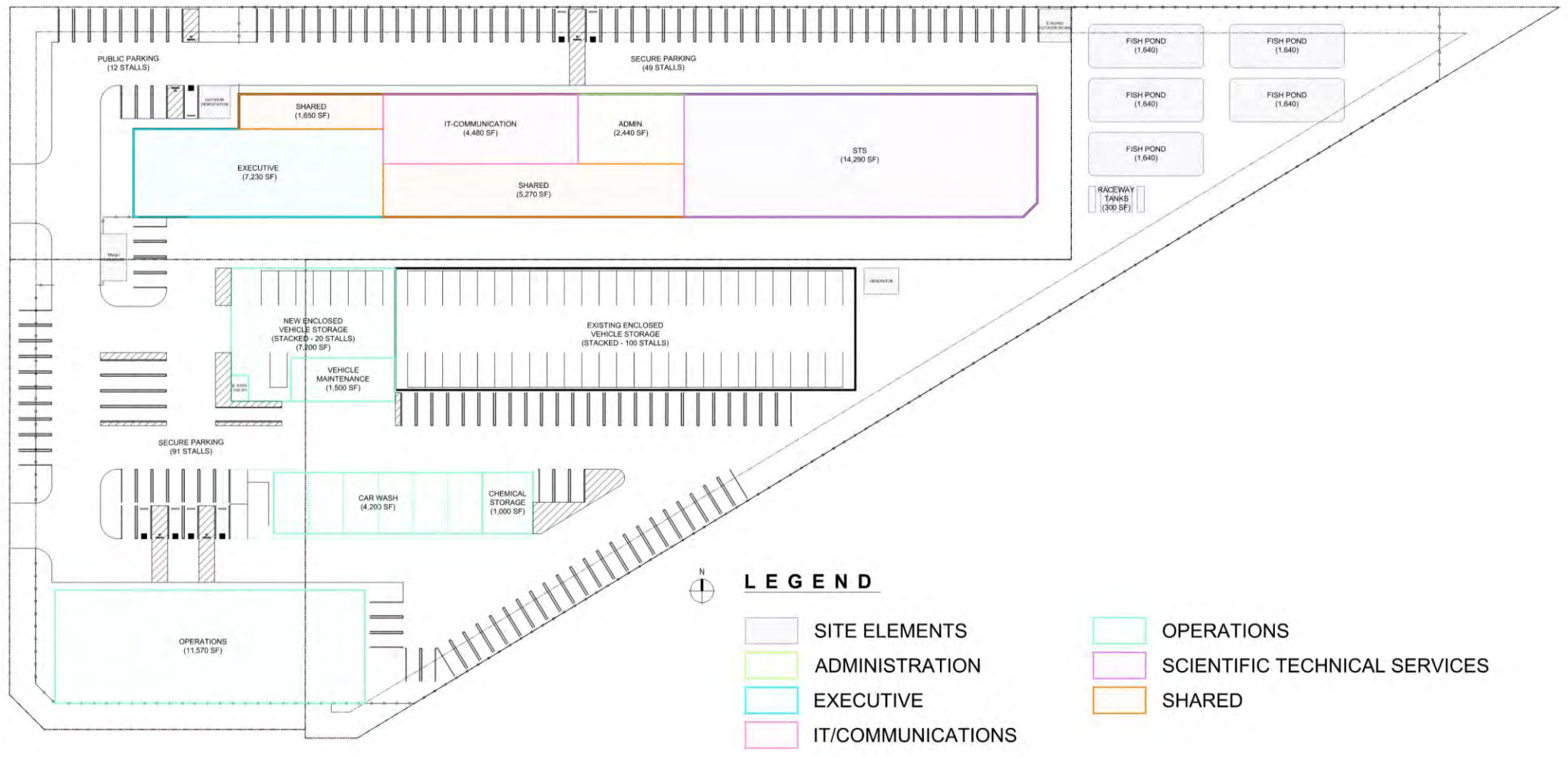
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# Site Plan Study



### TABULATIONS

<b>BUILDING</b>	
EXISTING	74,180 SF
<b>PARKING</b>	<b>PROVIDED</b>
PUBLIC	9
STAFF	129
<b>VEHICLE STORAGE</b>	<b>76</b>



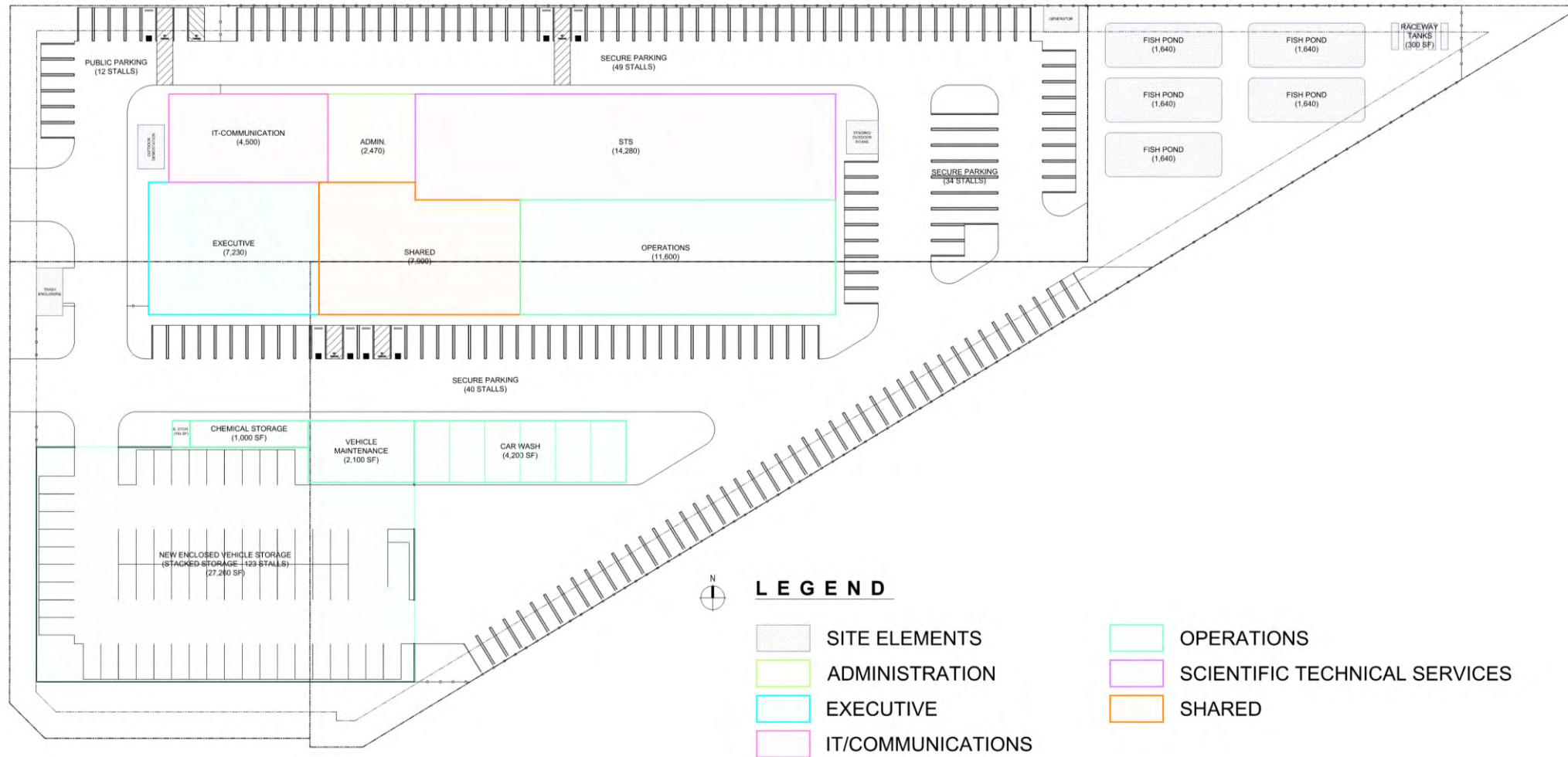
## TABULATIONS

### TABULATIONS

<u>BUILDING</u>	
EXISTING (DEMO)	19,930 SF
EXISTING (RE-USE)	54,250 SF
TOTAL NEW	23,980 SF
<b>TOTAL</b>	<b>78,230 SF</b>

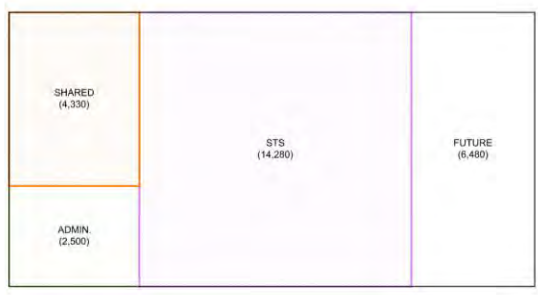
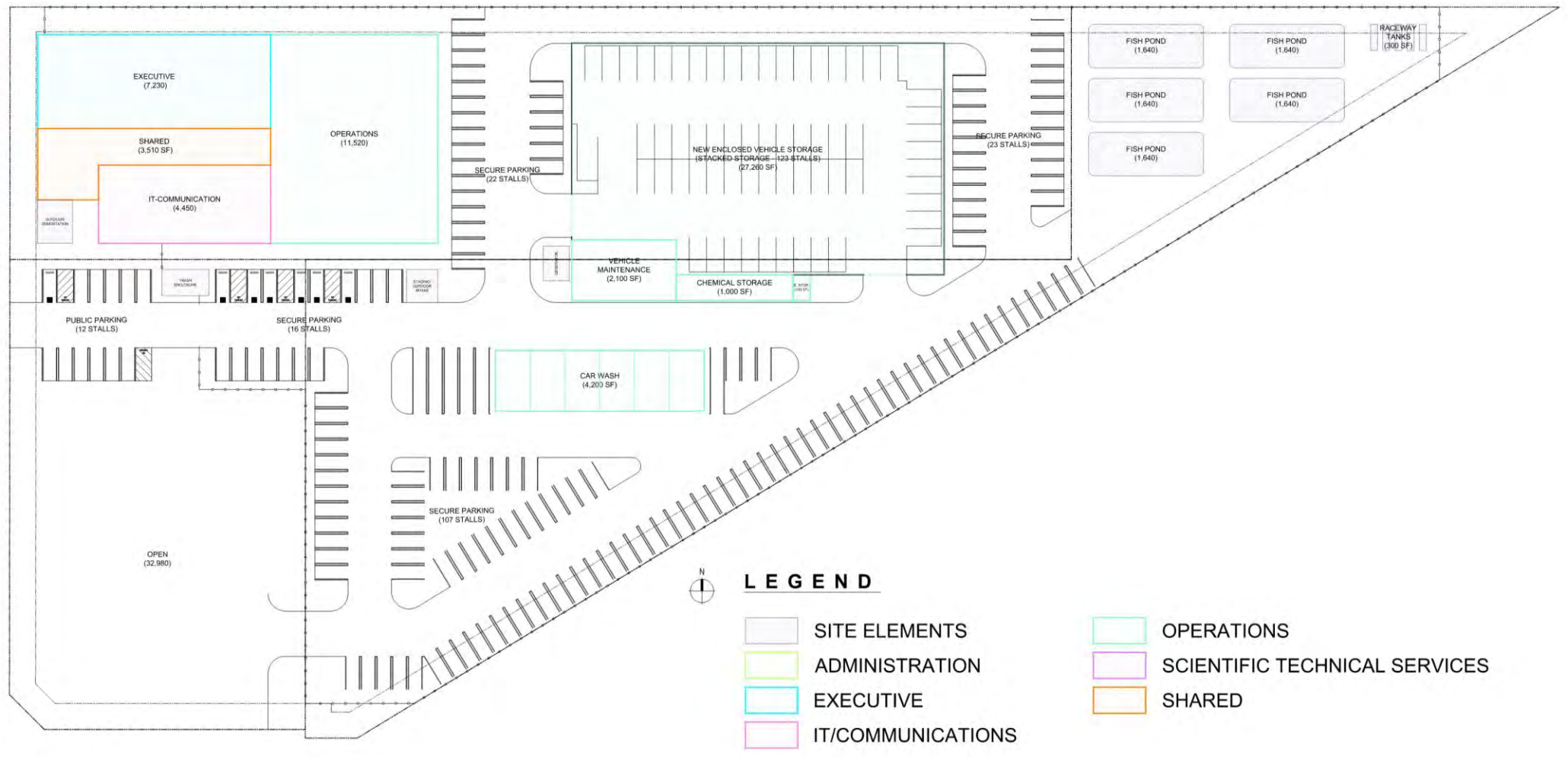
  

<u>PARKING</u>	<u>REQUIRED</u>	<u>PROVIDED</u>
PUBLIC	12	12
STAFF (SECURE)	168	140
VEHICLE STORAGE	123	123



### TABULATIONS

<b>BUILDING</b>		
EXISTING (DEMO)		19,930 SF
<b>TOTAL NEW</b>		<b>82,760 SF</b>
<b>PARKING</b>		
PUBLIC	12	12
STAFF (SECURE)	168	168
VEHICLE STORAGE	123	123

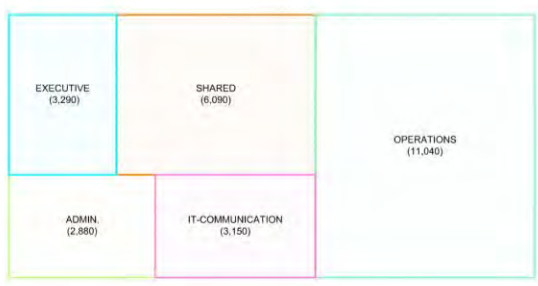
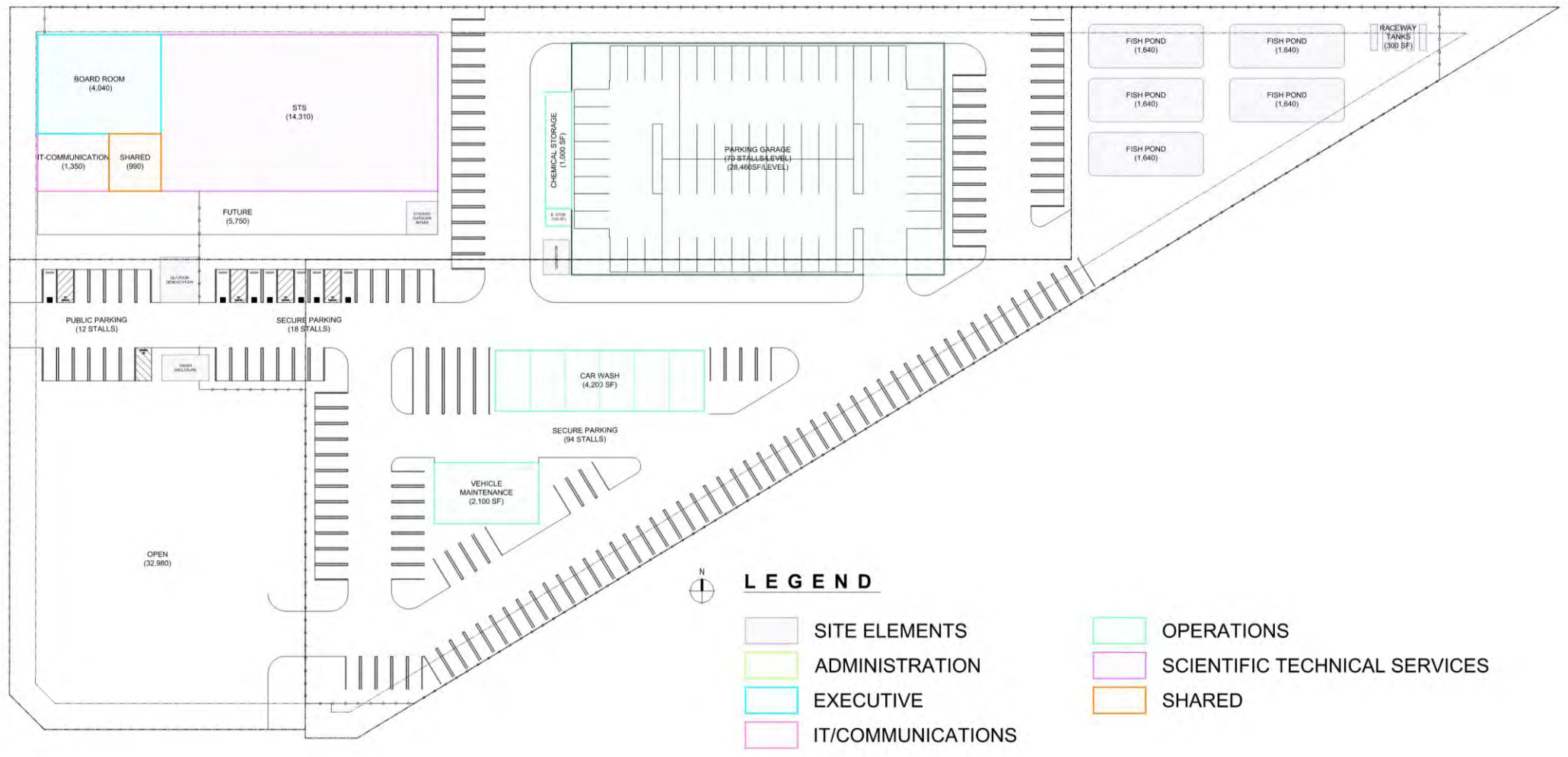


**SECOND FLOOR**

**TABULATIONS**

<b>BUILDING</b>		
EXISTING (DEMO)		74,180 SF
<b>TOTAL NEW</b>		<b>82,560 SF</b>
FUTURE EXPANSION		6,480 SF
OPEN SITE AREA		32,980 SF
<b>PARKING</b>		
	<b>REQUIRED</b>	<b>PROVIDED</b>
PUBLIC	12	12
STAFF (SECURE)	168	168
VEHICLE STORAGE	123	123





**SECOND FLOOR**

**TABULATIONS**

BUILDING		
EXISTING (DEMO)		74,180 SF
<b>TOTAL NEW</b>		<b>111,720 SF</b>
FUTURE EXPANSION		5,750 SF
OPEN SITE AREA		32,980 SF
PARKING		
PUBLIC	12	12
STAFF (SECURE)	168	168
VEHICLE STORAGE	123	123

**LPA**  
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*thank you*

# Orange County Mosquito and Vector Control District

April 10, 2019



**Orange County**  
**Mosquito and Vector Control District**

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- 01** Site Plan
- 02** Floor Plans
- 03** Inspiration

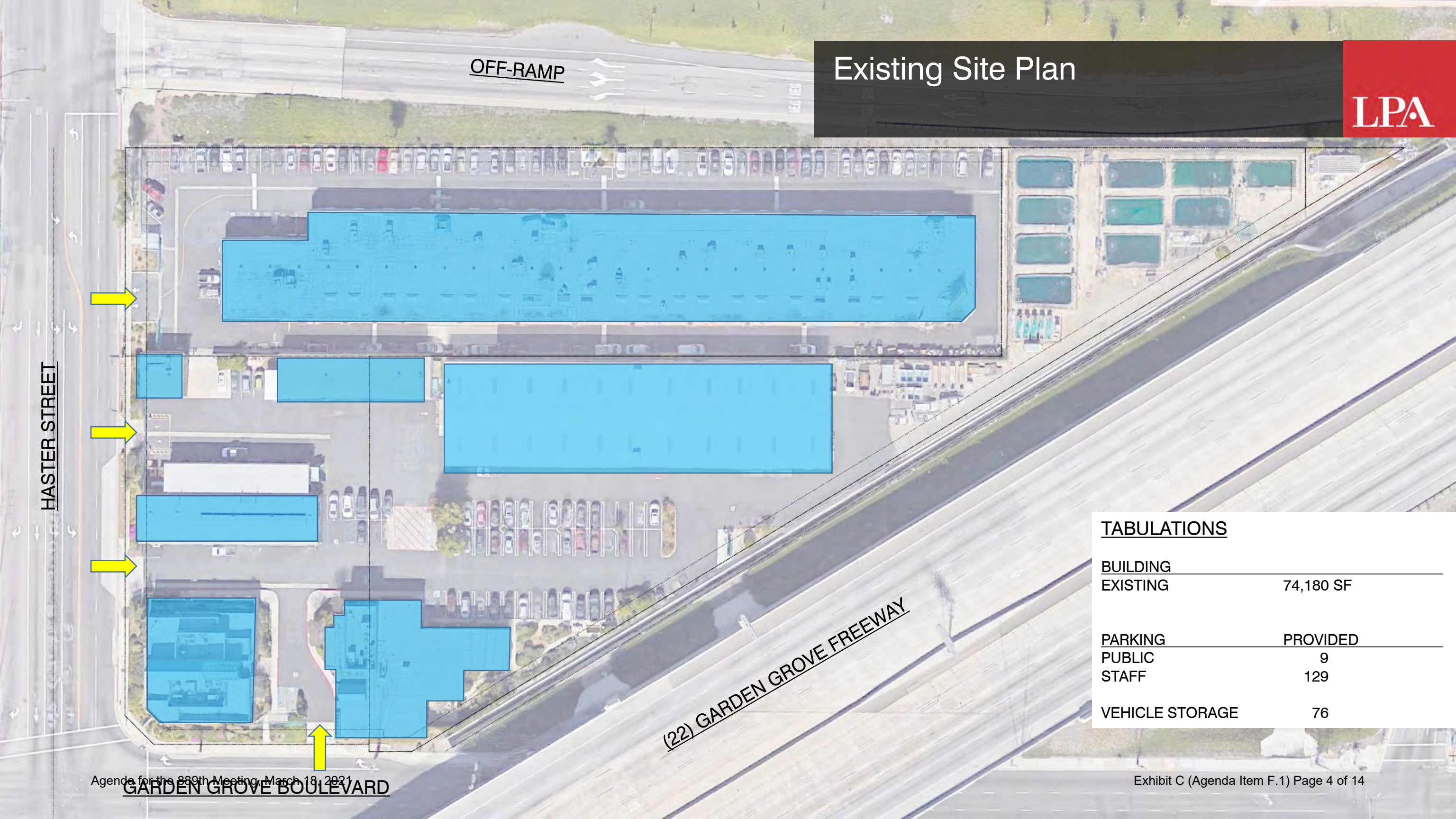


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# Site Plan



**TABULATIONS**

<b>BUILDING</b>	
EXISTING	74,180 SF
<b>PARKING</b>	<b>PROVIDED</b>
PUBLIC	9
STAFF	129
<b>VEHICLE STORAGE</b>	76

HASTER STREET

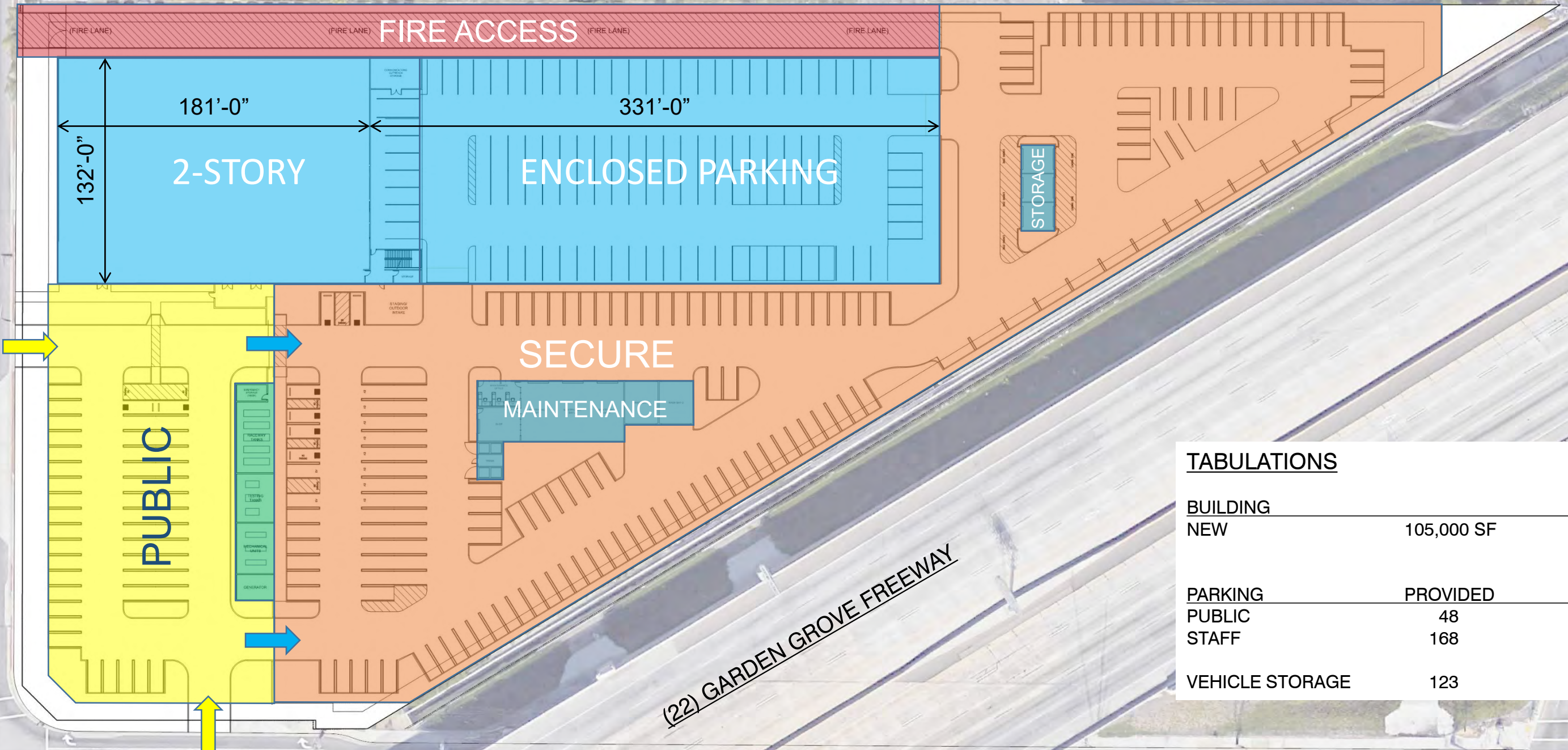
OFF-RAMP

(22) GARDEN GROVE FREEWAY

GARDEN GROVE BOULEVARD

HASTER STREET

OFF-RAMP



<u>TABULATIONS</u>	
<b>BUILDING</b>	
NEW	105,000 SF
<b>PARKING</b>	<b>PROVIDED</b>
PUBLIC	48
STAFF	168
VEHICLE STORAGE	123



**Orange County**  
**Mosquito and Vector Control District**

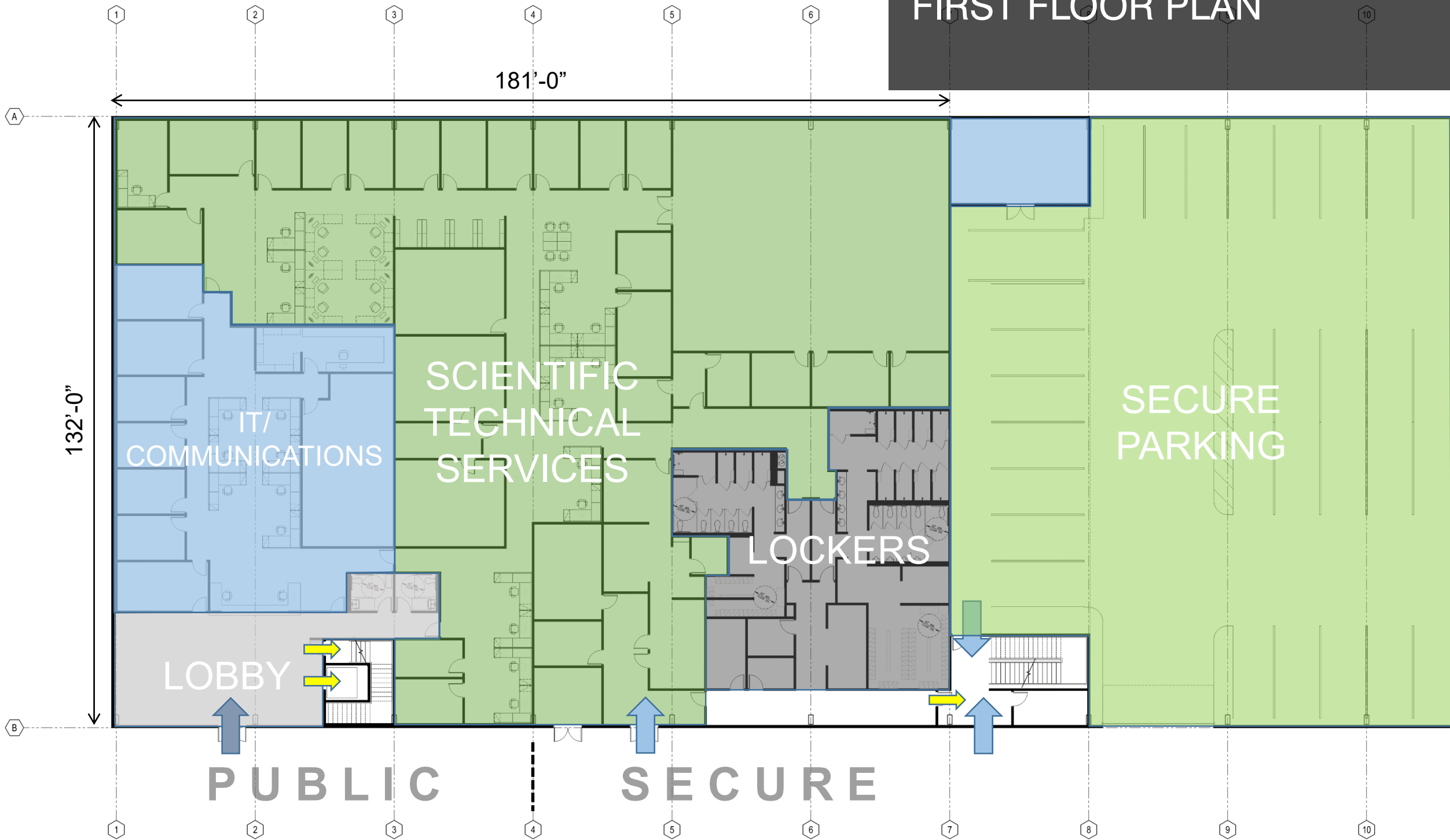
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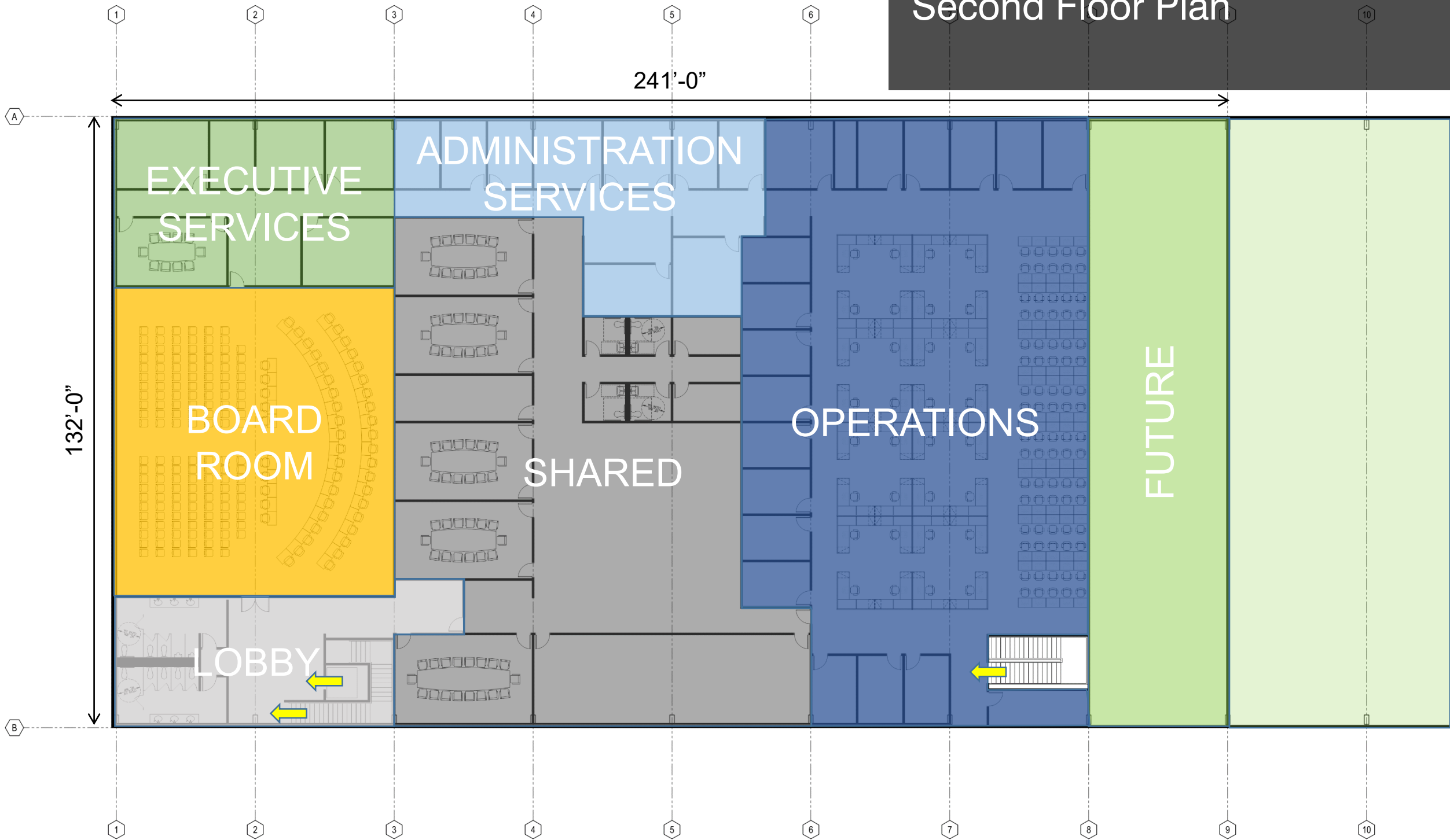
# Floor Plans



# FIRST FLOOR PLAN



# Second Floor Plan





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**Mosquito and Vector Control District**

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Inspiration

Pre-engineered building with corrugated metal façade

LPA



Pre-engineered building with corrugated metal façade



Vertical metal slat option at exterior walls of parking enclosure

LPA



Perforated panel option at exterior walls of parking enclosure





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# OCMVCD HEADQUARTERS

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## FACILITY ASSET STRATEGY

JULY 2019

---

PREPARED FOR THE ORANGE COUNTY  
MOSQUITO & VECTOR CONTROL DISTRICT



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1601 N. SEPULVEDA BOULEVARD, SUITE 382  
 MANHATTAN BEACH, CA 90266  
 WWW.KOSMONT.COM

<p>The analyses, projections, assumptions, rates of return, and any examples presented herein are for illustrative purposes and are not a guarantee of actual and/or future results. Project pro forma and tax analyses are projections only. Actual results may differ materially from those expressed in this analysis.</p>
---

# 1.0 Executive Summary

The Orange County Mosquito and Vector Control District (“District”, “OCMVCD”) retained Kosmont Companies (“Kosmont”) to evaluate options to deliver a modern District headquarters facility either at the location of the existing OCMVCD headquarters, or at another location. In this analysis (“Analysis”) Kosmont evaluated the potential to construct a new building at the District’s existing facility, to move to an existing building elsewhere, or build a new facility elsewhere. Kosmont also evaluated the potential revenues that may be available to the OCMVCD from various disposition options of the District’s existing facility and the underlying property. For reference, the District has also retained architectural firm LPA to assist the District in completing a detailed needs assessment (i.e. size and function of space) for the District’s headquarters facility. The results of that analysis should be considered in conjunction with and inform scenarios contemplated in this Analysis.

As a result of its Analysis, it is Kosmont’s conclusion that the preferred option for the District may be to (i) identify and purchase an existing building to relocate its headquarters to, (ii) lease out the industrial portions of its current Site in their current configuration, and (iii) solicit interest in leasing the balance of the Site to a single user in the current configuration or as a ground lease for an alternative commercial development. The District could then use the lease revenue from its existing Site to help support the cost of acquisition, renovating (as necessary), and ongoing maintenance of its new facility.

A summary of the various facility modernization / replacements options and primary revenue options evaluated herein follow below. Additional details are provided in this Analysis. All conclusions are subject to refinement and/or modification upon completion of the District’s facility needs assessment.

### Facility Modernization / Replacement Options

	<b>Scenario</b>	<b>Description / Comments</b>	<b>Estimated Cost*</b>
<b>1</b>	Construct New Facility on Existing Site	Build to suit for operational uses, cost of improvements	\$30 - 45 MM
<b>2</b>	Purchase Different Building on Another Site	Purchase existing building on another site, renovate as needed for operational uses	\$20 - 30 MM
<b>3</b>	Construct New Facility on Another Site	Build to suit for operational uses, cost of improvements plus land	\$40 - 60 MM

*\*Preliminary estimates, to be refined based on needs assessment concurrently being completed by OCMVCD.*

---

Scenario	Primary Revenue Options		Estimated Annualized Cost
	Estimated One-Time Revenue	Estimated Annual Revenue	
<b>A Sell Existing Site</b>			
Office / Warehouse Portion	\$5.6 - \$8.5 MM		
Industrial Portion	\$5.2 - \$7.0 MM		
<b>B Lease Existing Site</b>			
Office / Warehouse Portion		\$250,000 - \$500,000	
Industrial Portion		\$350,000 - \$500,000	
<b>C Financing</b>			
Approximate Debt Service	\$10 MM		\$575,000 - \$600,000
(Tax exempt financing, 30-year term)	\$25 MM		\$1.4 - \$1.5 MM
	\$40 MM		\$2.3 - \$2.4 MM

*Note: Estimated Site values are based on ranges that are expected to represent marginal decreases from current market conditions and slight premiums on current market conditions.*

---

## 2.0 Background & Site Information

The Orange County Mosquito and Vector Control District retained Kosmont to evaluate options to effectuate the delivery of a modernized headquarters facility. In this Analysis the potential to modernize the District's existing facility, to move to an existing building elsewhere, or build a new ground up facility were evaluated. Kosmont also evaluated the potential revenues that may be available to the OCMVCD from various disposition options of the District's existing facility and underlying property.

Pertinent data sources used in this Analysis, and a profile of OCMVCD's existing facility follows in this section.

### 2.1 Data Sources

Primary data sources utilized in the preparation of this Analysis include the following:

- CBRE – Capitalization rate information and market data (2019)
- Kosmont Transaction Services (“KTS”) – Hypothetical District capital costs (2019)
- Orange County Assessor (“Assessor”) – Parcel data (2019)
- OCMVCD – Property information, various other data (2019)
- REIS – Market data and comps (2019)
- STR – Hotel data (2019)

### 2.2 Site Location

The District's current headquarters facility is located on a site (“Site”) at the northeast corner of Garden Grove Boulevard and Haster Street in the City of Garden Grove (“City”). Maps of the location of the Site within the region, area, and local neighborhood follow in Figure 1 through Figure 4 below.

Figure 1: Map of Region



Figure 2: Map of County (County Boundary)



Figure 3: Map of Area

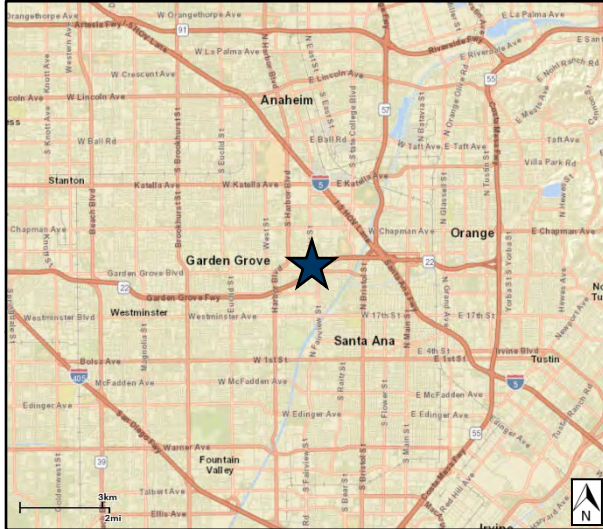
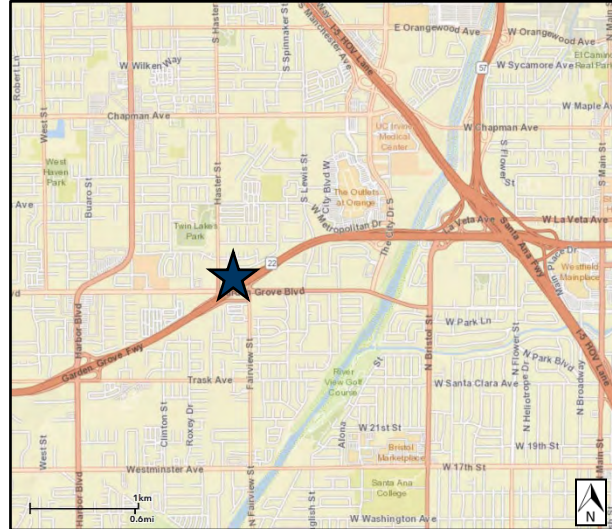


Figure 4: Map of Neighborhood



Pursuant to Orange County (“County”) Assessor records, the Site is comprised of three parcels totaling approximately 226,076 square feet, or approximately 5.19 acres. Additional details for the three parcels are provided in Table 1 below. The Orange County Assessor Parcel Map for the Site, an aerial of the Site, an annotated Site aerial, and an isometric aerial of the Site follow in Figure 7 through Figure 10 below.

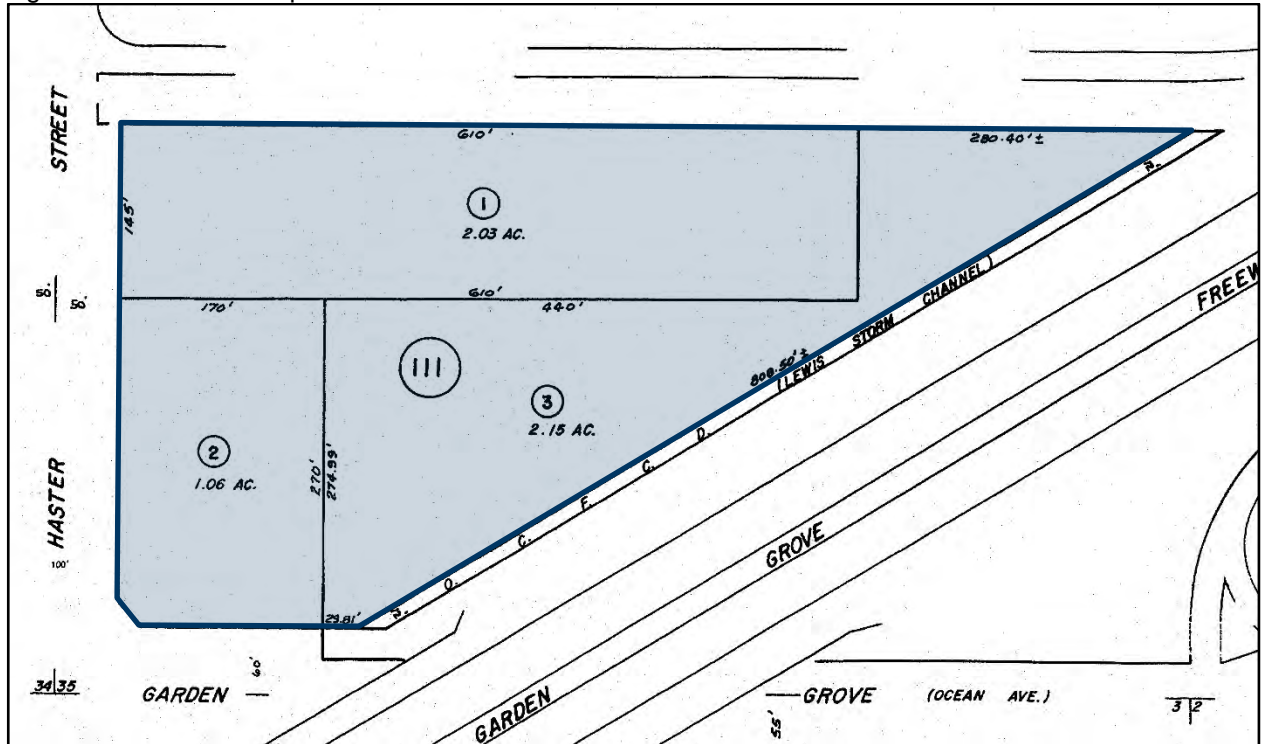
Table 1: Site Parcel Information

Address	APN	Land Acres	Imp. SF	Year Built	Land A/V	Imp. A/V	Total A/V
12902 Haster St	231-111-01	1.95	34,818	1972	2,561,614	1,688,975	4,250,589
13002 Garden Grove Blvd	231-111-02	1.26	u/a	u/a	189,670	759,376	949,046
13001 Garden Grove Blvd	231-111-03	1.98	u/a	u/a	\$ 372,819	\$ 634,351	\$ 1,007,170
		<b>5.19</b>			<b>\$ 3,124,103</b>	<b>\$ 3,082,702</b>	<b>\$ 6,206,805</b>

Note: 12902 Haster St / APN 231-111-01 is generally referred to as the “industrial” portion of the Site, and 13001-2 Garden Grove Blvd is generally referred to as the “office” portion of the Site herein.



Figure 7: Site Parcel Map



Note: The Assessor Parcel Map shows parcel 231-111-01 as 2.03 acres (versus 1.98 acres on Assessor roll data), shows parcel 231-111-02 as 1.06 acres (versus 1.26 acres on Assessor roll data), and parcel 231-111-03 as 2.15 acres (versus 1.98 acres on Assessor roll data).

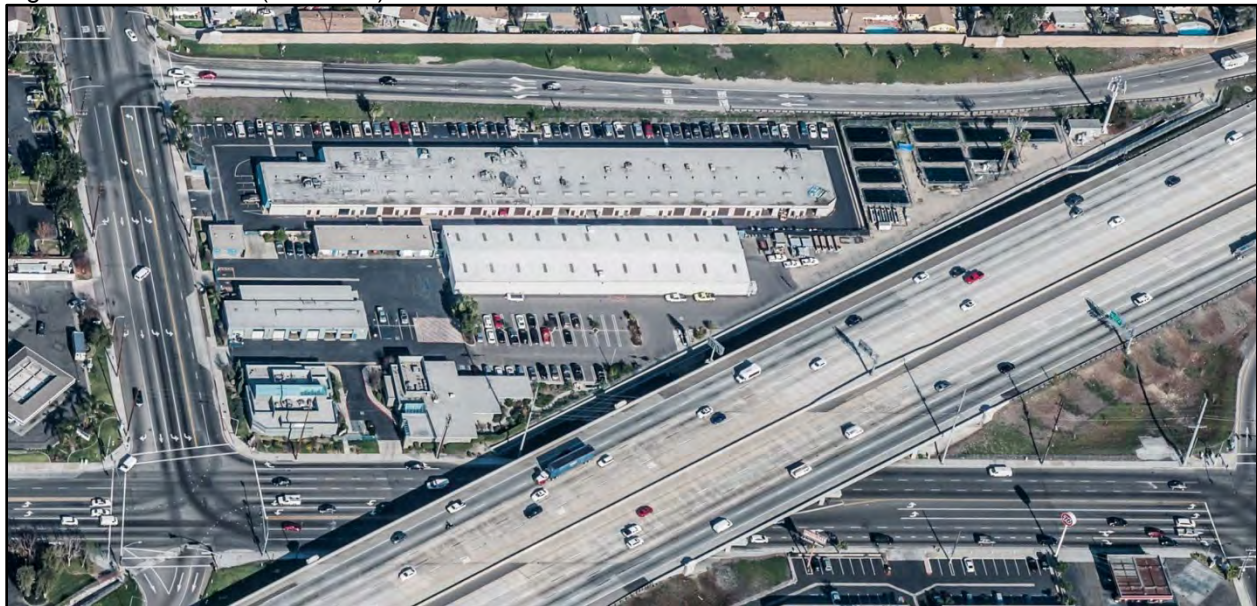
Figure 8: Aerial of Site



Figure 9: Annotated Site Aerial



Figure 10: Site Aerial (Isometric)



# 3.0 Facility Replacement

The primary options available to the District to deliver a modern headquarters facility and potential costs associated with the same are discussed in this section.

## 3.1 Modernization / New Construction Costs

Given the public procurement process, modernizing and new construction costs can be elevated for public agencies. In Table 2 below a hypothetical range of total project costs is provided based on modernization of an existing building or construction costs of a new building ranging from \$100 to \$500 per square foot, and given a built area ranging from 50,000 to 125,000 square feet. Costs per square foot on the lower end of the range would conceptually cover some modernization activities, while costs on the higher end of the range would conceptually cover new construction activities. It is important to note that public agency budgets for modernization programs regularly exceed \$500 per square foot, and public agency budgets for new construction can readily exceed \$800 per square foot. However, as a substantial portion of the District's facilities have garage / warehouse functions, the overall / average cost of District facilities is expected to be commensurately lower. Further refinement is expected upon completion of the District's facility needs assessment by architectural firm LPA. Table 2 follows below.

Table 2: Sample Order of Magnitude Modernization / New Construction Costs

		Cost Per Square Foot				
		Modernization		New Construction		
		\$ 100.00	\$ 200.00	\$ 300.00	\$ 400.00	\$ 500.00
Square Feet	50,000	\$5,000,000	\$10,000,000	\$15,000,000	\$20,000,000	\$25,000,000
	75,000	7,500,000	15,000,000	22,500,000	30,000,000	37,500,000
	100,000	10,000,000	20,000,000	30,000,000	40,000,000	50,000,000
	125,000	12,500,000	25,000,000	37,500,000	50,000,000	62,500,000

## 3.2 New Facility on Existing Site

Under this option the District's existing facility would be demolished, and a completely new facility constructed on the District's existing property. This scenario would be expected to require the demolition of the industrial portion of the Site, and thus the elimination of a revenue stream for the OCMVCD (approximately \$200,000 - 300,000 per year).

The District's facility needs assessment will inform the potential costs, efficiency, and viability of this option. In advance of the completion of that analysis, Kosmont utilized a placeholder estimate for this scenario of \$30 to \$45 million with the ultimate cost dependent on the size and quality of the building constructed.

### 3.3 Repurpose Existing Building on Another Site

Under this scenario the District would acquire an existing building at another location that aligned with its operational needs as closely as possible. The District’s facility needs assessment will inform the potential costs of this option. However, in advance of the completion of that analysis, Kosmont utilized a placeholder estimate of \$20 - \$30 million, which includes an allowance of \$5 - \$10 million for building improvements.

### 3.4 New Facility on Another Site

A new, purpose-built facility typically provides an organization such as the OCMVCD with a facility that provides enhanced operational efficiency, though also comes with the greatest construction costs. The District’s facility needs assessment will inform the potential costs of this option. In advance of the completion of that analysis, Kosmont utilized a placeholder estimate of \$40 - \$60 million, which includes a \$10 – \$15 million allowance for the cost of land.

### 3.5 Financing of Improvements

Kosmont affiliate KTS performed a preliminary evaluation of the District’s potential borrowing costs. A summary of the estimated annual debt service, and financing profiles for tax exempt bond issues with project funds of \$10 million, \$25 million, and \$40 million follow in Table 3 below.

Table 3: Hypothetical Bond Issues

<b>Project Fund</b>	<b>\$ 10,000,000</b>	<b>\$ 25,000,000</b>	<b>\$ 40,000,000</b>
<b>Par Amount</b>	\$ 10,310,000	\$ 25,565,000	\$ 40,820,000
<b>Average Coupon</b>	3.75%	3.75%	3.75%
<b>True Interest Cost</b>	3.79%	3.79%	3.79%
<b>All Inclusive Cost</b>	3.99%	3.93%	3.91%
<b>Term (Years)</b>	30	30	30
<b>Average Payment</b>	\$ 578,329	\$ 1,433,898	\$ 2,289,379
<b>Annual Debt Service per \$1 MM</b>	57,833	57,356	57,234

### 3.6 OCMVCD Debt Capacity

Kosmont affiliate KTS performed a preliminary evaluation of the District’s potential borrowing capacity based upon information provided by the OCMVCD. Pursuant to conversations with District staff, the OCMVCD budget could potentially support debt service payments of approximately \$120,000 per month, or approximately \$1.44 million per year. Based upon the preliminary estimates illustrated in Section 3.5 above, KTS estimates that the District could potentially borrow approximately \$25 million through the issuance of bonds. This estimate is subject to changes in market conditions, and a full evaluation of the District’s bonding capacity.

## 4.0 Market Fundamentals & Trends

A discussion of capitalization rates, and market fundamentals and trends for office, industrial, retail, and hospitality uses follows in this section.

### 4.1 Capitalization Rates

The value of various development product types to an owner-investor (rather than owner-occupant) is typically driven heavily by the income generated by an investment in consideration of the perceived risk of the investment. Capitalization rates (“cap rates”) evaluate the net income after expenses that an investment yields relative to the cost (on a cash basis) of the investment. A real estate product type selling at a higher relative cap rate typically has a higher perceived risk or inferior market fundamentals as compared to a product with a lower cap rate. An asset with a higher cap rate than an asset within the same product type typically requires investment, lease-up, or has some other current or future impairment (“Value Add” product). A summary of market capitalization rates reported by CBRE for the greater Orange County area, for various product types follows in Table 4 below.

Table 4: Area Capitalization Rates (H2 2018)

Product Type	Class	Stabilized	Value Add
Hotel	Full-Service	6.50% - 7.75%	
	Select-Service	6.75% - 7.75%	
	Economy	7.50% - 9.00%	
Industrial	Class A	3.75% - 4.25%	4.50% - 5.00%
	Class B	4.50% - 5.00%	5.00% - 6.00%
	Class C	6.00% - 7.25%	6.50% - 7.50%
Multi-Family Residential	Class A	4.00% - 4.50%	5.25% - 6.75%
	Class B	4.25% - 5.25%	6.00% - 7.50%
	Class C	4.75% - 5.25%	6.75% - 8.00%
Office	Class A	5.50% - 6.50%	6.50% - 7.50%
	Class B	6.75% - 7.75%	7.75% - 8.75%
	Class C	7.75% - 8.75%	8.75% - 9.75%
Neighborhood / Commercial Center (Retail)	Class A	4.25% - 5.00%	
	Class B	6.00% - 6.75%	7.00% - 7.75%
	Class C	8.00% - 9.00%	8.00% - 9.50%

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## 4.2 Office Market Segment

The area office market appears moderately healthy overall. The average vacancy rate in the proximate market area is slightly elevated at 14.9%, while the median is notably lower at 11.2%. Asking rent in the area range from lows of approximately \$17 per square foot per year to highs of approximately \$39 per square foot, and average approximately \$28 per square foot. Building age appears to be moderately correlated with asking rent.

Approximately 59% of area office development was constructed between 1980 and 1999, approximately 30% was constructed before 1980, and approximately 11% was constructed between 2000 – 2009. No office development is listed as constructed subsequent to 2009. However, it is projected that, on average, approximately 72,600 square feet will be constructed each year over the next five years. A map of the area office submarket follows in Figure 11 below, and additional metrics on the office market follow in Figure 12 and Figure 13 and Table 5 through Table 7 below.

Figure 11: Map of Office Submarket Area

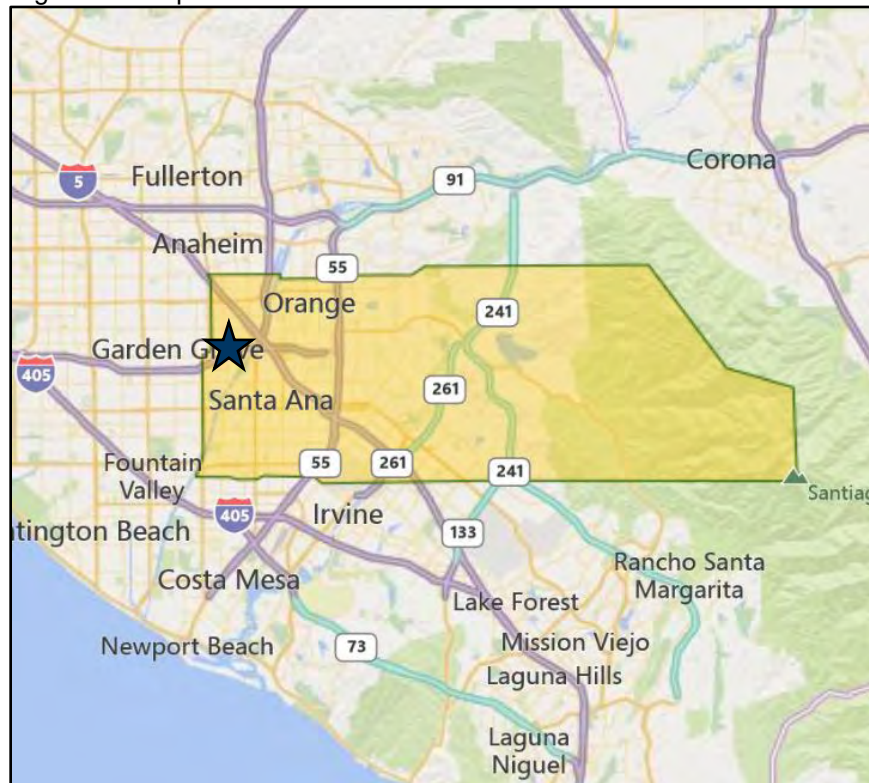


Figure 12: Office Submarket Asking Rent & Vacancy

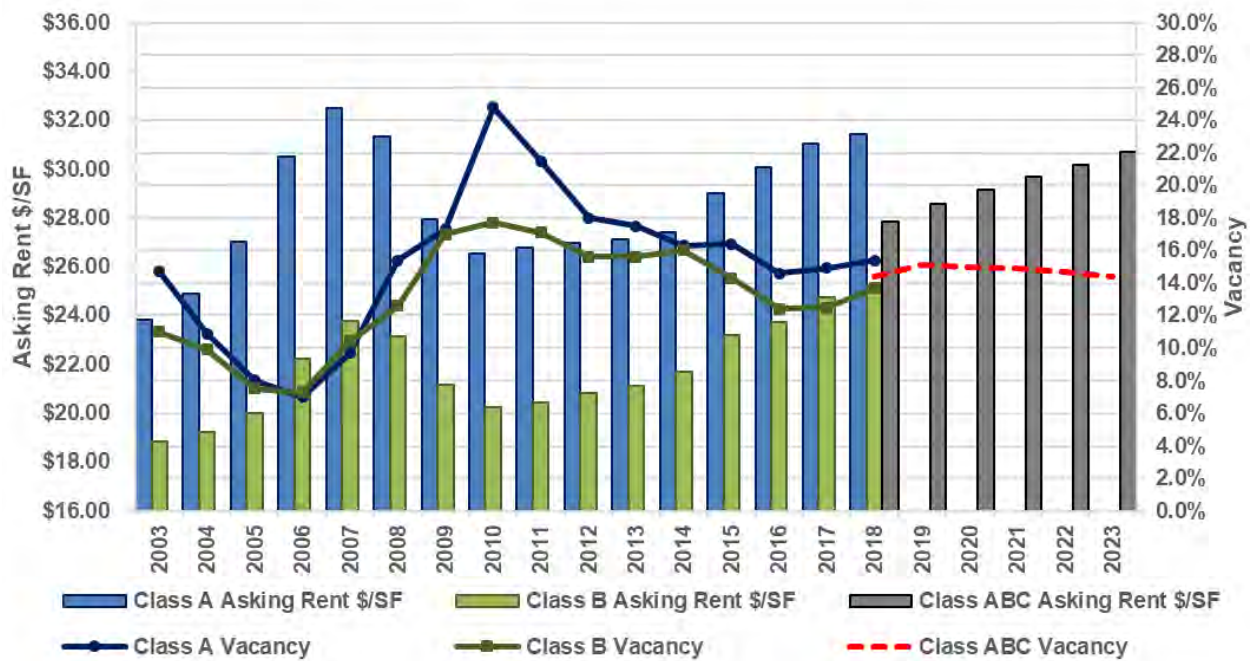


Figure 13: Office Submarket Inventory & Occupied Square Feet

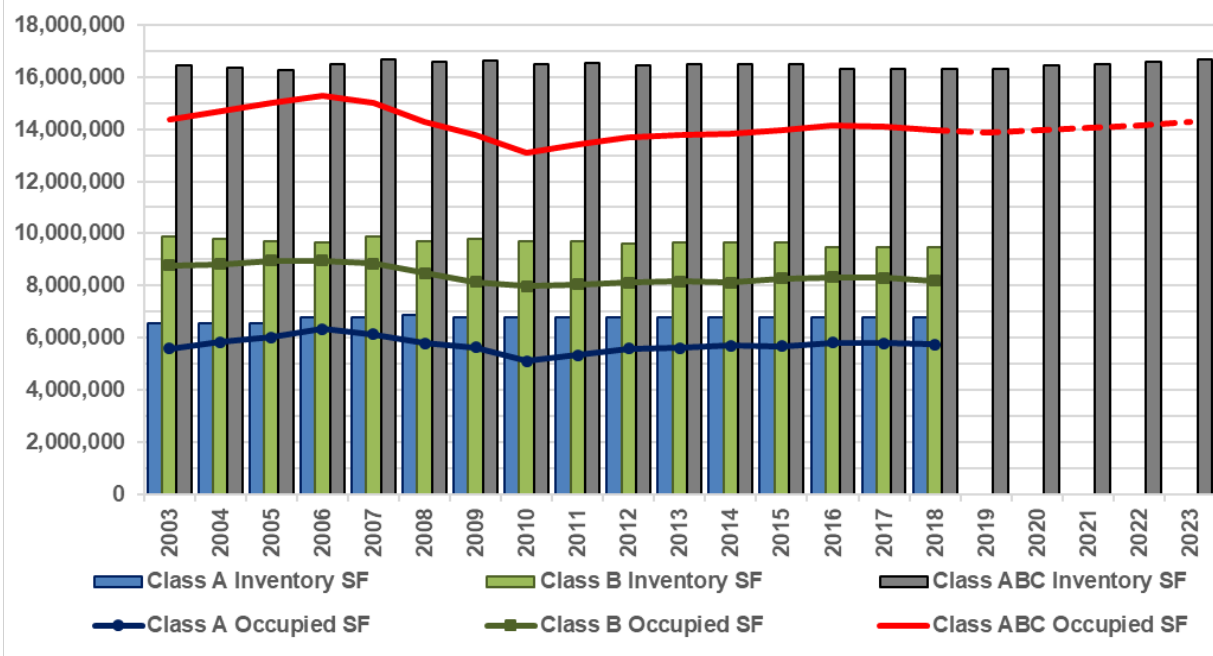


Table 5: Summary Office Submarket Metrics

Asking Rent by Building Age		Asking Rent Distribution		Asking Rent Growth Distribution	
<b>Before 1970</b>	\$ 27.47	<b>Low</b>	\$ 16.50	<b>Low</b>	0.0%
<b>1970-1979</b>	24.00	<b>25%</b>	23.93	<b>25%</b>	0.9%
<b>1980-1989</b>	28.40	<b>Mean</b>	28.08	<b>Mean</b>	0.9%
<b>1990-1999</b>	34.38	<b>Median</b>	29.46	<b>Median</b>	1.0%
<b>2000-2009</b>	34.82	<b>75%</b>	33.29	<b>75%</b>	1.1%
<b>After 2009</b>	23.75	<b>High</b>	38.62	<b>High</b>	1.4%

Vacancy by Building Age		Vacancy Rate Distribution		Inventory by Building Age	
<b>Before 1970</b>	20.4%	<b>Low</b>	0.0%	<b>Before 1970</b>	11.0%
<b>1970-1979</b>	10.0%	<b>25%</b>	1.4%	<b>1970-1979</b>	19.0%
<b>1980-1989</b>	22.6%	<b>Mean</b>	14.9%	<b>1980-1989</b>	53.0%
<b>1990-1999</b>	8.5%	<b>Median</b>	11.2%	<b>1990-1999</b>	6.0%
<b>2000-2009</b>	5.2%	<b>75%</b>	23.4%	<b>2000-2009</b>	11.0%
<b>After 2009</b>	6.0%	<b>High</b>	80.1%	<b>After 2009</b>	0.0%

Table 6: Office Submarket New Construction & Absorption (Annualized)

	SF Built	SF Absorbed
<b>Past Year</b>	-	(147,000)
<b>Past 3 Years</b>	-	(7,000)
<b>Past 5 Years</b>	-	35,000
<b>5 Year Forecast</b>	72,600	62,200

Table 7: Sample Office Sale Comparables

Sale Date	Class	Address	Built	Floors	Lot Size (SF)	Building Size (SF)	Sale Price	Sale Price (SF)
1/30/2019	BC	3745 W Chapman Ave	1988	2	52,485	25,500	\$ 11,350,000	\$ 445
6/13/2018	BC	8100 Garden Grove Blvd	1963	1	59,242	13,448	3,050,000	227
7/31/2017	BC	9465 Garden Grove Blvd	1952	2	37,026	12,500	3,400,000	272
7/26/2017	BC	1212 W 17th St	1962	2	36,155	13,140	7,200,000	548
6/23/2017	BC	9535 Garden Grove Blvd	1985	2	39,757	18,416	3,900,000	212
2/8/2017	BC	11277 Garden Grove Blvd	1984	2	85,378	36,310	6,250,000	172
1/23/2017	A	2708 Westminster Ave	2009	2	33,977	13,180	3,225,000	245
1/14/2017	BC	1720 W Ball Rd	1961	1	29,621	7,901	2,050,000	259
			<b>1976</b>		<b>46,705</b>	<b>17,549</b>	<b>\$ 5,053,125</b>	<b>\$ 297</b>



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### 4.3 Industrial Market Segment

The local industrial market appears robust, and an increasingly landlord's market. The average vacancy rate in the proximate market area is less than 6% in the Warehouse / Distribution segment, and less than 2% in the Flex / R&D segment.

Asking rent in the area for Flex / R&D space ranges from lows of approximately \$8 per square foot per year to highs of approximately \$17 per square foot, and averages approximately \$12 per square foot. Building age appears to be moderately correlated with asking rent for Flex / R&D product, however the newest buildings appear to be leasing at a discount.

Asking rent in the area for Warehouse / Distribution space ranges from lows of approximately \$6 per square foot per year for to highs of approximately \$13 per square foot, and averages approximately \$10 per square foot. Building age appears to be moderately correlated with asking rent, and the newest product appears to lease at a slight premium to older product. It is projected that, on average, approximately 73,000 square feet of new Warehouse / Distribution space will be constructed each year over the next five years. A map of the area industrial submarket follows in Figure 14 below, and additional metrics on the proximate industrial market follow in Figure 15 and Figure 16 and Table 8 through Table 10 below.

Figure 14: Map of Industrial Submarket Area

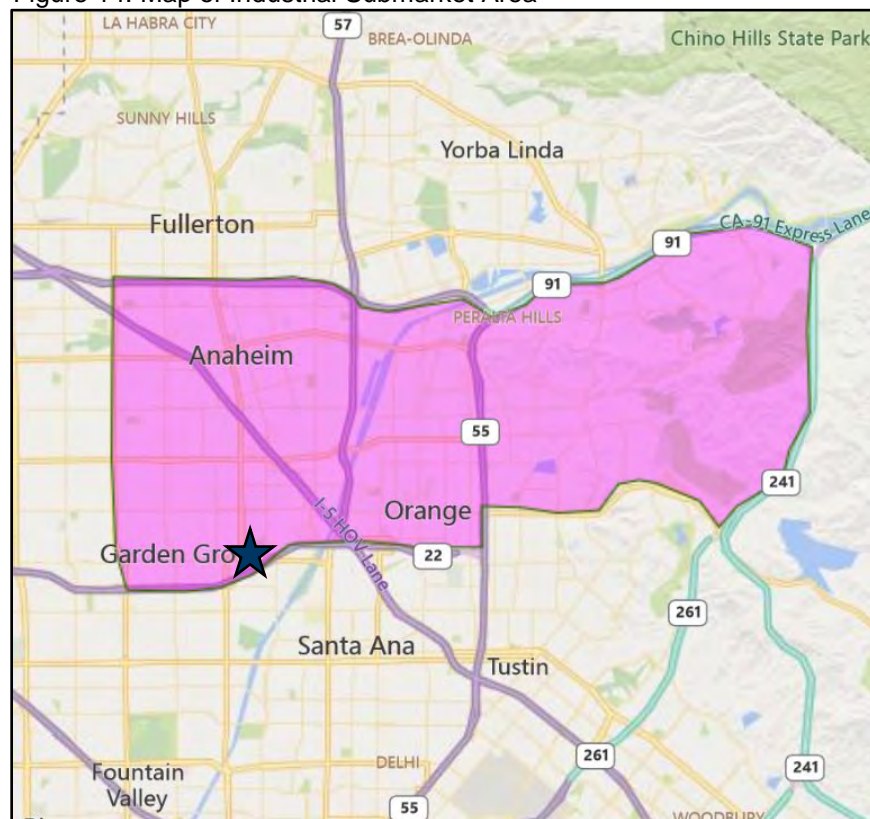


Figure 15: Industrial Submarket Rent & Vacancy

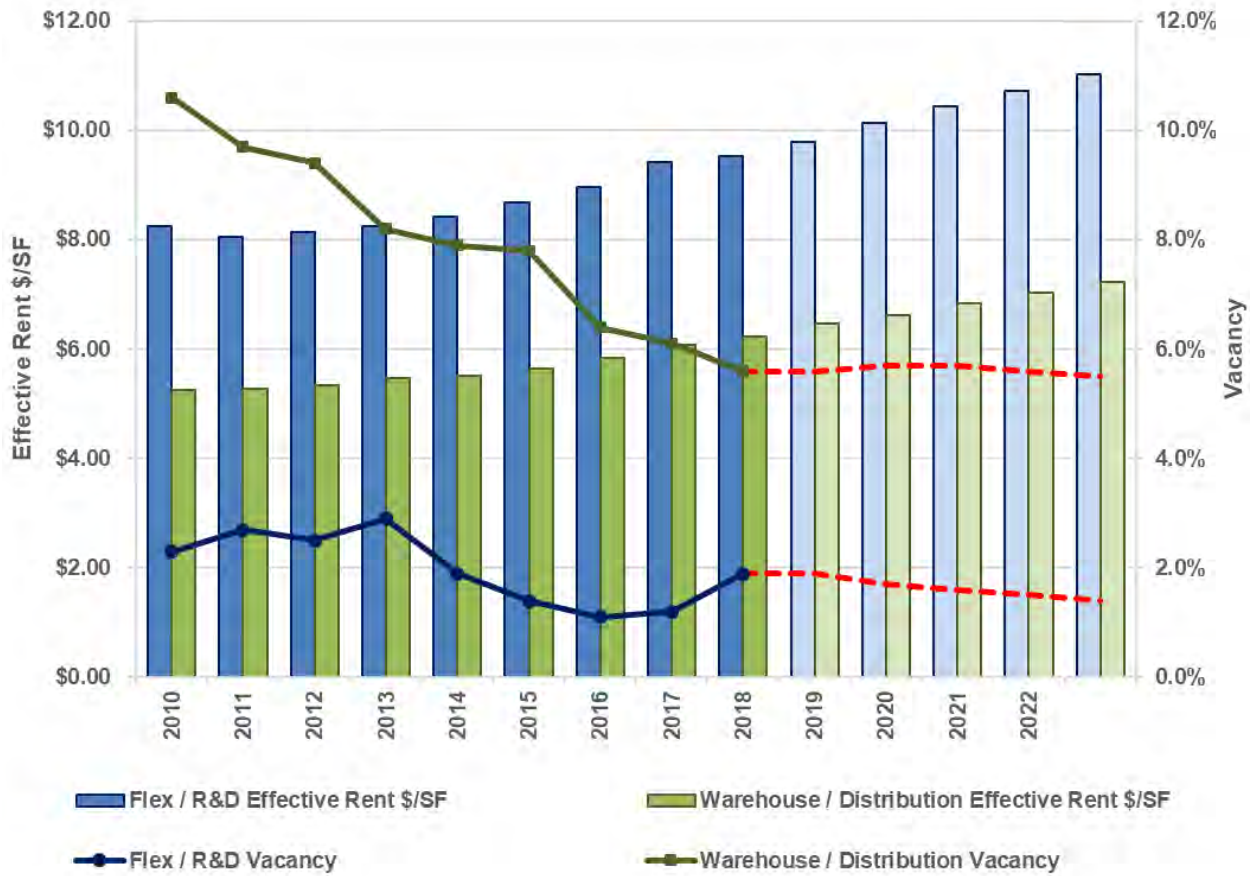


Figure 16: Industrial Submarket Inventory & Occupied Square Feet

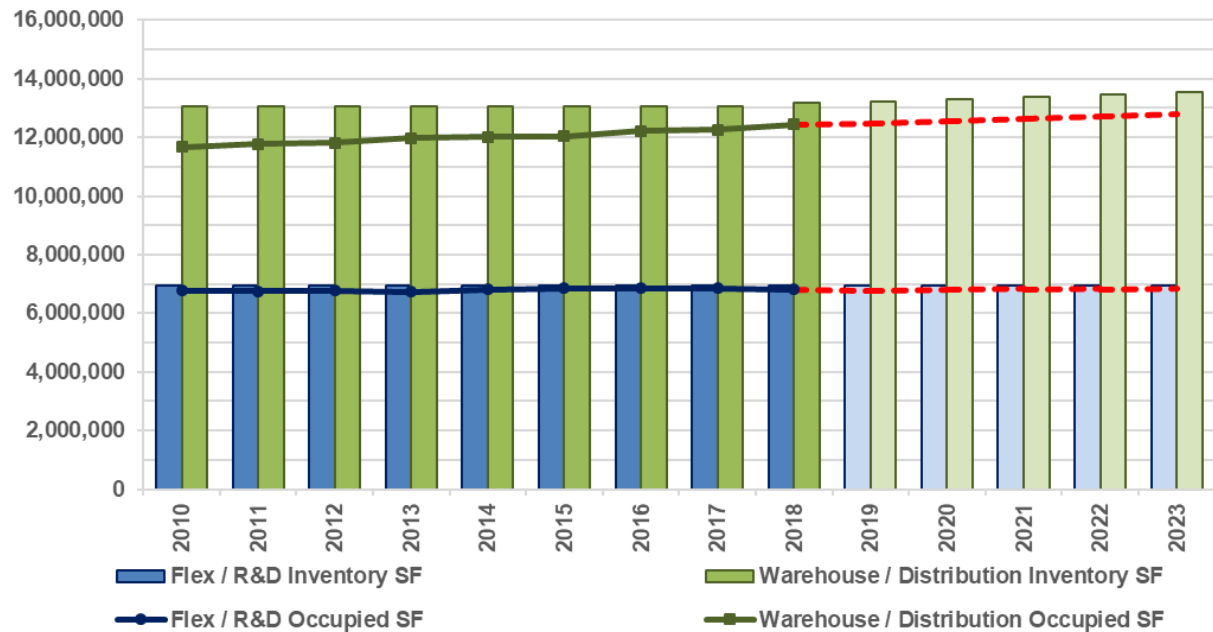


Table 8: Flex/R&D Industrial Submarket Metrics

<b>Asking Rent by Building Age</b>		<b>Asking Rent Distribution</b>		<b>Asking Rent Growth Distribution</b>	
<b>Before 1970</b>	\$ 7.88	<b>Low</b>	\$ 7.88	<b>Low</b>	0.0%
<b>1970-1979</b>	12.19	<b>25%</b>	10.13	<b>25%</b>	1.6%
<b>1980-1989</b>	11.02	<b>Median</b>	11.50	<b>Median</b>	1.9%
<b>1990-1999</b>	15.83	<b>75%</b>	13.07	<b>75%</b>	2.1%
<b>2000-2009</b>	8.85	<b>High</b>	16.99	<b>High</b>	2.4%
<b>After 2009</b>	n/a				

<b>Vacancy by Building Age</b>		<b>Vacancy Rate Distribution</b>		<b>5 Year Forecast</b>	
<b>Before 1970</b>	0.0%	<b>Low</b>	0.0%	<b>SF Built</b>	-
<b>1970-1979</b>	2.6%	<b>25%</b>	0.0%	<b>SF Absorbed</b>	6,000
<b>1980-1989</b>	17.0%	<b>Median</b>	0.0%		
<b>1990-1999</b>	28.0%	<b>75%</b>	1.0%		
<b>2000-2009</b>	0.0%	<b>High</b>	100.0%		
<b>After 2009</b>	n/a				

Table 9: Warehouse / Distribution Industrial Submarket Metrics

<b>Asking Rent by Building Age</b>		<b>Asking Rent Distribution</b>		<b>Asking Rent Growth Distribution</b>	
<b>Before 1970</b>	\$ 8.57	<b>Low</b>	\$ 6.20	<b>Low</b>	1.6%
<b>1970-1979</b>	9.76	<b>25%</b>	7.07	<b>25%</b>	1.8%
<b>1980-1989</b>	9.01	<b>Median</b>	9.79	<b>Median</b>	2.1%
<b>1990-1999</b>	8.42	<b>75%</b>	11.02	<b>75%</b>	2.4%
<b>2000-2009</b>	9.08	<b>High</b>	13.44	<b>High</b>	9.4%
<b>After 2009</b>	10.81				

<b>Vacancy by Building Age</b>		<b>Vacancy Rate Distribution</b>		<b>5 Year Forecast</b>	
<b>Before 1970</b>	6.5%	<b>Low</b>	0.0%	<b>SF Built</b>	73,000
<b>1970-1979</b>	6.7%	<b>25%</b>	0.0%	<b>SF Absorbed</b>	71,800
<b>1980-1989</b>	2.0%	<b>Median</b>	0.0%		
<b>1990-1999</b>	16.0%	<b>75%</b>	2.9%		
<b>2000-2009</b>	47.7%	<b>High</b>	48.8%		
<b>After 2009</b>	0.0%				

Table 10: Sample Industrial Sale Comparables

**Flex / R&D**

Sale Date	Address	Built	Floors	Lot Size (SF)	Building Size (SF)	Sale Price	Sale Price (SF)
6/18/2018	10521 Dale Ave	1959	1	206,474	111,534	\$ 12,825,000	\$ 115
1/4/2018	10531-61 Garden Grove Blvd	1998	2	44,741	24,614	3,100,000	126
11/30/2017	810 N Lemon	1973	1	21,344	9,810	2,000,000	204
8/29/2017	10871 Forbes Ave	1989	2	76,517	39,952	5,430,000	136
7/19/2017	1981 E Wright Circle	1974	1	43,560	19,200	4,490,000	234
		<b>1979</b>		<b>78,527</b>	<b>41,022</b>	<b>\$ 5,569,000</b>	<b>\$ 163</b>

**Warehouse / Distribution**

Sale Date	Address	Built	Floors	Lot Size (SF)	Building Size (SF)	Sale Price	Sale Price (SF)
9/21/2018	10822 Forbes Ave	1989	1	23,522	11,377	\$ 2,218,000	\$ 195
8/16/2018	13941 Nautilus Dr	1979	1	16,988	8,964	2,618,182	292
11/20/2017	12610 Westminster Ave	1965	1	53,579	11,070	2,975,000	269
10/30/2017	10555 Stanford Ave	1973	1	20,473	10,800	2,250,000	208
1/10/2017	10781 Forbes Ave	1990	2	147,667	77,500	11,000,000	142
		<b>1979</b>		<b>52,446</b>	<b>23,942</b>	<b>\$ 4,212,236</b>	<b>\$ 221</b>

#### 4.4 Retail Market Segment

The local retail market appears healthy overall, and while rents are projected to increase modestly overall in the near term, vacancy rates are also projected to increase marginally. The average vacancy rate in the proximate market area is approximately 6% in the Neighborhood Center segment, and approximately 3% in the Community Center segment.

Asking rent in the area for Neighborhood Center retail space ranges from lows of approximately \$16 per square foot per year to highs of approximately \$50 per square foot, and averages approximately \$27 per square foot. Building age appears to be moderately correlated with asking rent for Neighborhood Center retail product.

Asking rent in the area for Community Center space ranges from lows of approximately \$16 per square foot per year for to highs of approximately \$60 per square foot, and averages approximately \$29 per square foot. Building ages does not appear to be correlated with asking rent for Community Center retail product.

While no retail product was listed as constructed within the last five years, it is projected that, on average, approximately 30,200 square feet will be constructed within the submarket area each year over the next five years. A map of the area retail submarket follows in Figure 17 below, and additional metrics on the proximate industrial market follow in Figure 18 and Figure 19 and Table 11 through Table 15 below.

Figure 17: Map of Retail Submarket Area

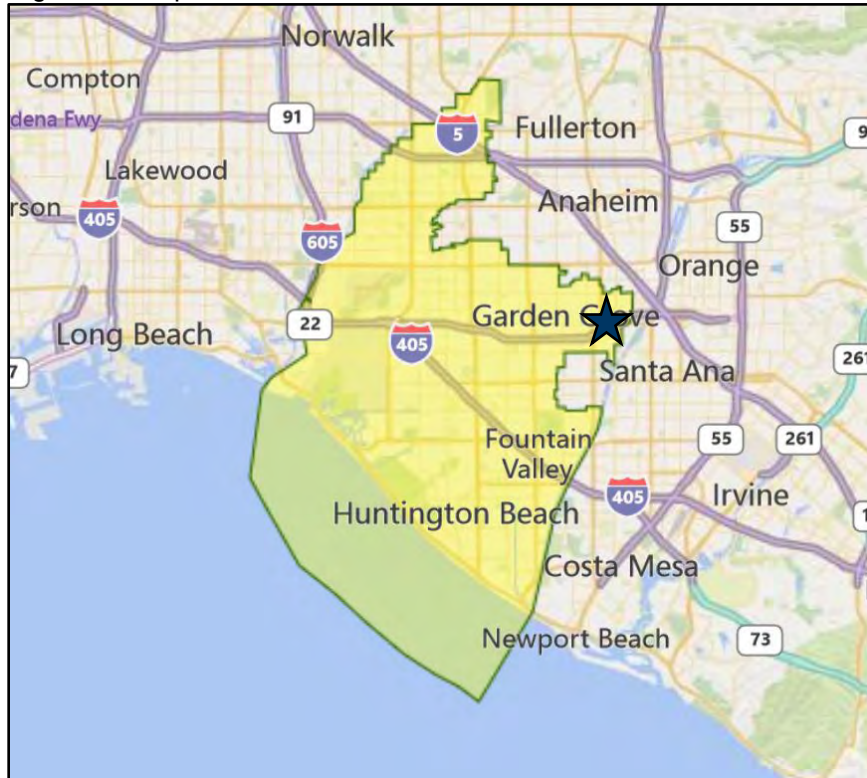


Figure 18: Retail Submarket Rent & Vacancy

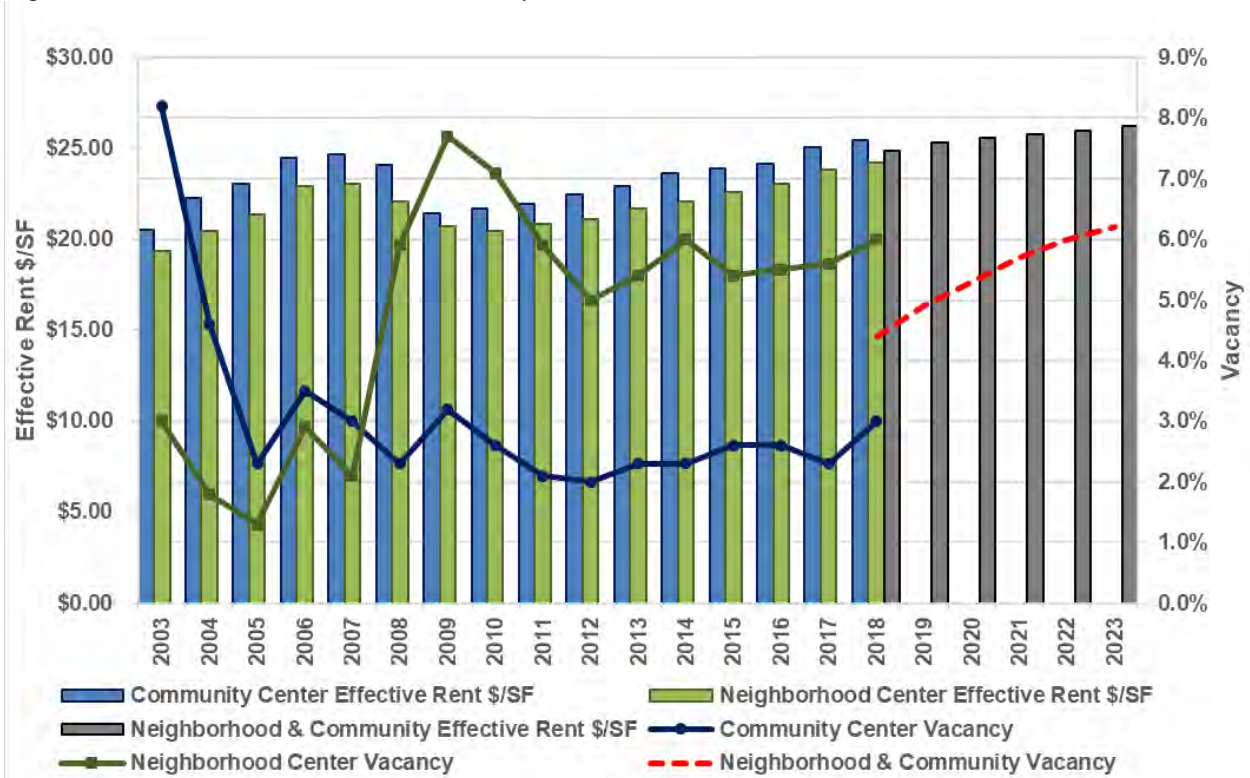


Figure 19: Retail Submarket Inventory & Occupied Square Feet

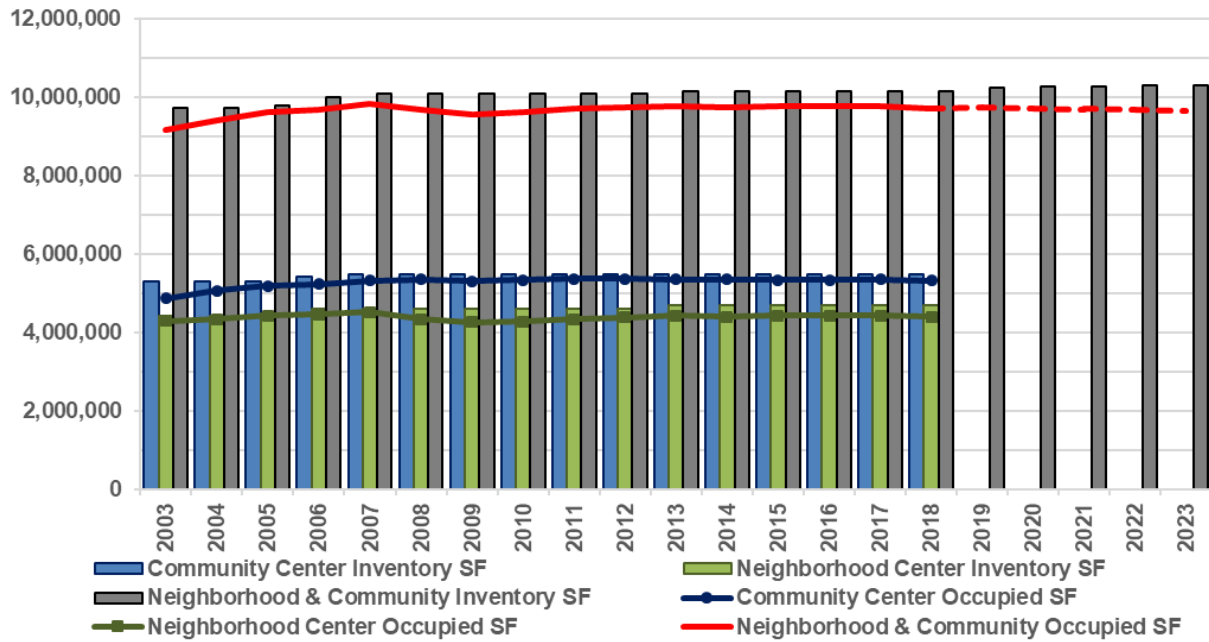


Table 11: Neighborhood Center Retail Submarket Metrics

Asking Rent by Building Age		Asking Rent Distribution (Non-Anchor)		Asking Rent Distribution (Anchor)	
<b>Before 1970</b>	\$ 24.63	<b>Low</b>	\$ 15.65	<b>Low</b>	\$ 7.64
<b>1970-1979</b>	26.30	<b>25%</b>	21.64	<b>25%</b>	15.57
<b>1980-1989</b>	26.32	<b>Mean</b>	27.02	<b>Mean</b>	19.77
<b>1990-1999</b>	37.33	<b>Median</b>	25.46	<b>Median</b>	18.98
<b>2000-2009</b>	33.19	<b>75%</b>	30.35	<b>75%</b>	22.65
<b>After 2009</b>	9.00	<b>High</b>	50.00	<b>High</b>	29.79

Asking Rent Growth Distribution (Non-Anchor)		Vacancy by Building Age		Vacancy Rate Distribution	
<b>Low</b>	-0.5%	<b>Before 1970</b>	3.8%	<b>Low</b>	0.0%
<b>25%</b>	-0.5%	<b>1970-1979</b>	10.3%	<b>25%</b>	0.0%
<b>Mean</b>	0.3%	<b>1980-1989</b>	4.0%	<b>Mean</b>	5.9%
<b>Median</b>	-0.4%	<b>1990-1999</b>	8.8%	<b>Median</b>	3.2%
<b>75%</b>	-0.4%	<b>2000-2009</b>	5.2%	<b>75%</b>	6.4%
<b>High</b>	0.1%	<b>After 2009</b>	0.0%	<b>High</b>	41.2%

Table 12: Community Center Retail Submarket Metrics

<b>Asking Rent by Building Age</b>		<b>Asking Rent Distribution (Non-Anchor)</b>		<b>Asking Rent Distribution (Anchor)</b>	
<b>Before 1970</b>	\$ 46.68	<b>Low</b>	\$ 15.96	<b>Low</b>	\$ 13.94
<b>1970-1979</b>	33.88	<b>25%</b>	29.10	<b>25%</b>	17.25
<b>1980-1989</b>	36.78	<b>Mean</b>	28.53	<b>Mean</b>	22.82
<b>1990-1999</b>	24.59	<b>Median</b>	36.49	<b>Median</b>	21.96
<b>2000-2009</b>	39.76	<b>75%</b>	45.00	<b>75%</b>	27.84
<b>After 2009</b>	n/a	<b>High</b>	60.00	<b>High</b>	37.93

<b>Asking Rent Growth Distribution (Non-Anchor)</b>		<b>Vacancy by Building Age</b>		<b>Vacancy Rate Distribution</b>	
<b>Low</b>	-0.5%	<b>Before 1970</b>	8.8%	<b>Low</b>	0.0%
<b>25%</b>	-0.5%	<b>1970-1979</b>	1.4%	<b>25%</b>	0.4%
<b>Mean</b>	1.4%	<b>1980-1989</b>	2.1%	<b>Mean</b>	3.0%
<b>Median</b>	-0.4%	<b>1990-1999</b>	0.3%	<b>Median</b>	1.8%
<b>75%</b>	-0.3%	<b>2000-2009</b>	4.2%	<b>75%</b>	4.0%
<b>High</b>	11.1%	<b>After 2009</b>	n/a	<b>High</b>	12.9%

Table 13: Retail Building Age Distribution

<b>Inventory by Building Age</b>	
<b>Before 1970</b>	24.0%
<b>1970-1979</b>	24.0%
<b>1980-1989</b>	31.0%
<b>1990-1999</b>	15.0%
<b>2000-2009</b>	6.0%
<b>After 2009</b>	1.0%

Table 14: Retail Submarket New Construction & Absorption (Annualized)

	<b>SF Built</b>	<b>SF Absorbed</b>
<b>Past Year</b>	-	(58,000)
<b>Past 3 Years</b>	-	(17,000)
<b>Past 5 Years</b>	-	(13,000)
<b>5 Year Forecast</b>	30,200	(8,800)

Table 15: Sample Retail Sale Comparables

<u>Sale Date</u>	<u>Address</u>	<u>Use</u>	<u>Built</u>	<u>Floors</u>	<u>Lot Size (SF)</u>	<u>Building Size (SF)</u>	<u>Sale Price</u>	<u>Sale Price (SF)</u>
7/2/2018	12372 Garden Grove Blvd	Freestanding Retail	1956	1	39,204	10,514	\$2,800,000	\$ 266
6/25/2019	12362 Chapman Avenue	Restaurant	2008	1	21,148	5,428	3,000,000	553
11/30/2018	12011 Harbor Blvd	Restaurant	2001	1	54,189	7,138	3,375,000	473
2/21/2018	13471 Magnolia St	Starbucks	1985	1	27,360	3,905	4,150,000	1,063
12/15/2017	12221 Brookhurst St	Bank	1961	2	26,136	11,515	3,550,000	308
8/2/2017	12892 Harbor Blvd	Neighborhood Center	1980	1	139,392	33,974	6,800,000	200
6/1/2017	2191 S Harbor Blvd	Restaurant	1967	1	27,007	5,890	3,650,000	620
			<b>1980</b>		<b>47,777</b>	<b>11,195</b>	<b>\$3,903,571</b>	<b>\$ 498</b>

## 4.5 Hospitality Market

The hospitality market proximate to the Site appears robust, likely due to a number of demand drivers including Disneyland, The Outlets at Orange, UCI Medical Center, and the Anaheim Convention Center. Table 16 below provides summary details on 16 area hotels whose locations are shown in Figure 20 below. Metrics for five of the 16 identified hotels were reviewed to evaluate the hotel market considered appropriate for the Site, and will be discussed in detail subsequently.

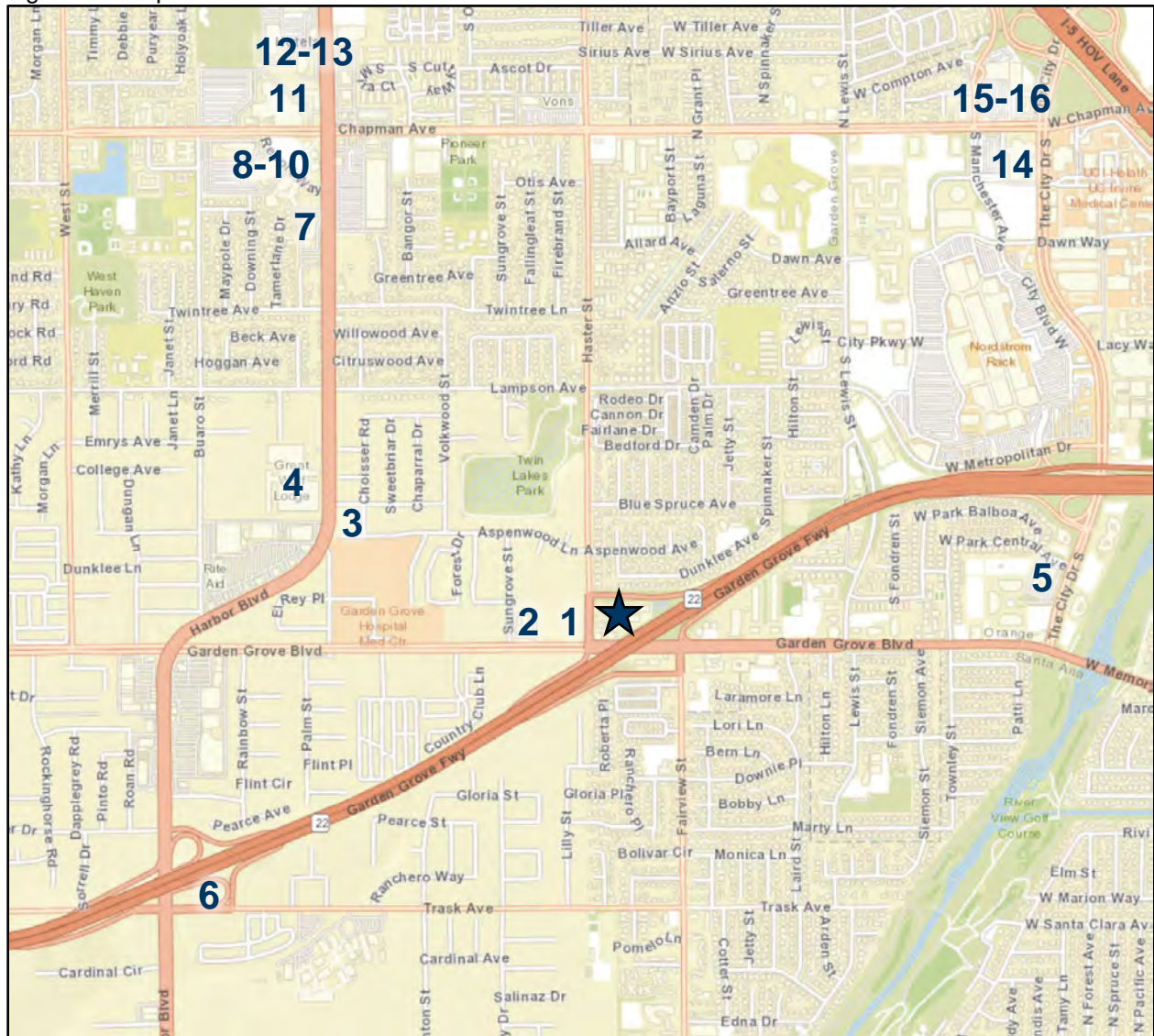
Table 16: Hotels Proximate to Site

	<u>Hotel</u>	<u>Class</u>	<u>Rooms</u>	<u>Opened</u>
<b>1</b>	Candlewood Suites	Midscale	133	Aug 1998
<b>2</b>	<b>Holiday Inn Express &amp; Suites</b>	<b>Upper Midscale</b>	<b>100</b>	<b>Mar 2003</b>
<b>3</b>	Days Inn & Suites	Economy	40	Sep 2008
<b>4</b>	Great Wolf Lodge	Upscale	603	Feb 2016
<b>5</b>	<b>Best Western Plus</b>	<b>Upper Midscale</b>	<b>140</b>	<b>May 1988</b>
<b>6</b>	Motel 6	Economy	50	Feb 1970
<b>7</b>	Sheraton Hotel	Upper Upscale	285	Jul 2008
<b>8</b>	Delta Hotel	Upscale	376	Oct 2000
<b>9</b>	Marriot Anaheim Suites	Upper Upscale	371	Nov 2002
<b>10</b>	<b>Homewood Suites</b>	<b>Upscale</b>	<b>166</b>	<b>Oct 2000</b>
<b>11</b>	Hyatt Regency	Upper Upscale	653	Jun 1986
<b>12</b>	<b>Residence Inn</b>	<b>Upscale</b>	<b>200</b>	<b>Jun 2003</b>
<b>13</b>	<b>Hilton Garden Inn</b>	<b>Upscale</b>	<b>169</b>	<b>Aug 1999</b>
<b>14</b>	DoubleTree by Hilton	Upscale	461	Mar 1984
<b>15</b>	ALO Hotel by Ayres	Upper Midscale	127	Jun 1980
<b>16</b>	Ayres Hotel	Upper Midscale	139	Aug 2014

*Note: Hotels in bold are in the market set analyzed subsequently herein.*



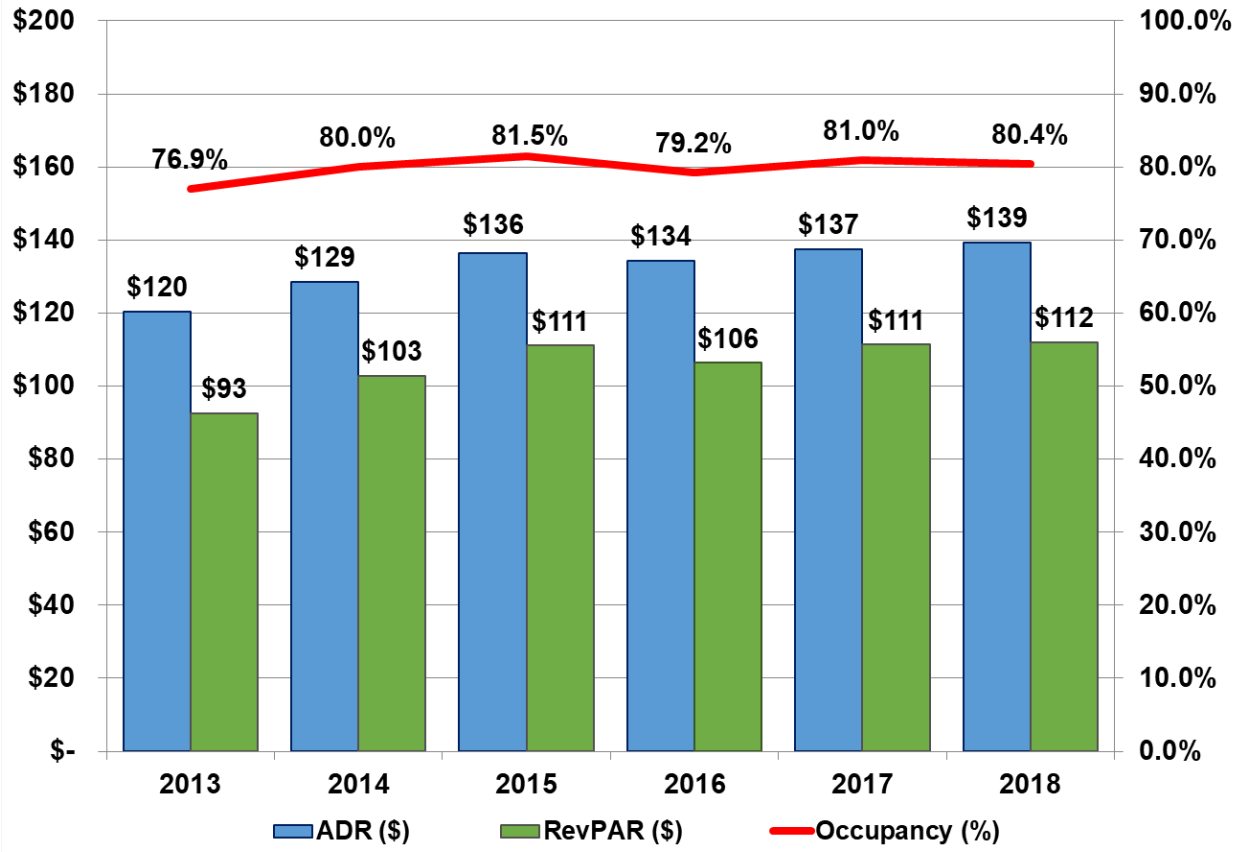
Figure 20: Map of Hotels Proximate to Site



As introduced above, performance metrics for five hotels (hotels in bold in Table 16 above) were evaluated to provide a picture of the existing hotel market proximate to the Site within the upper midscale and upscale hotel tiers. The five hotels were selected to approximate potential hotel performance within the market area for hotels of a quality likely appropriate for the Site. Charts summarizing the performance of the five hotels follow in Figure 21 through Figure 24 below.

For reference, “ADR” refers to the Average Daily Rate and RevPAR refers to Revenue Per Available Room. ADR is the average rate a guest pays per room night, while RevPAR is the amount of revenue each hotel room or “key” generates in consideration of occupancy rates. At the time of the preparation of this analysis, additional information on hotel classifications and terminology could be found [here](#).

Figure 21: Hotel Market Set ADR, RevPAR and Occupancy 2013 - 2018



As illustrated above, the ADR for the market set of hotels has increased moderately over the last five years to just above \$139. Occupancy rates are moderately strong, and has kept RevPAR fairly stable over the period. For reference, Kosmont considers occupancy rates above 80% to be strong for this market segment. In the figures below the performance metrics are evaluated based on the day of the week, and month of the year.

Figure 22: Hotel Market Set ADR, RevPAR, Occupancy by Day of Week

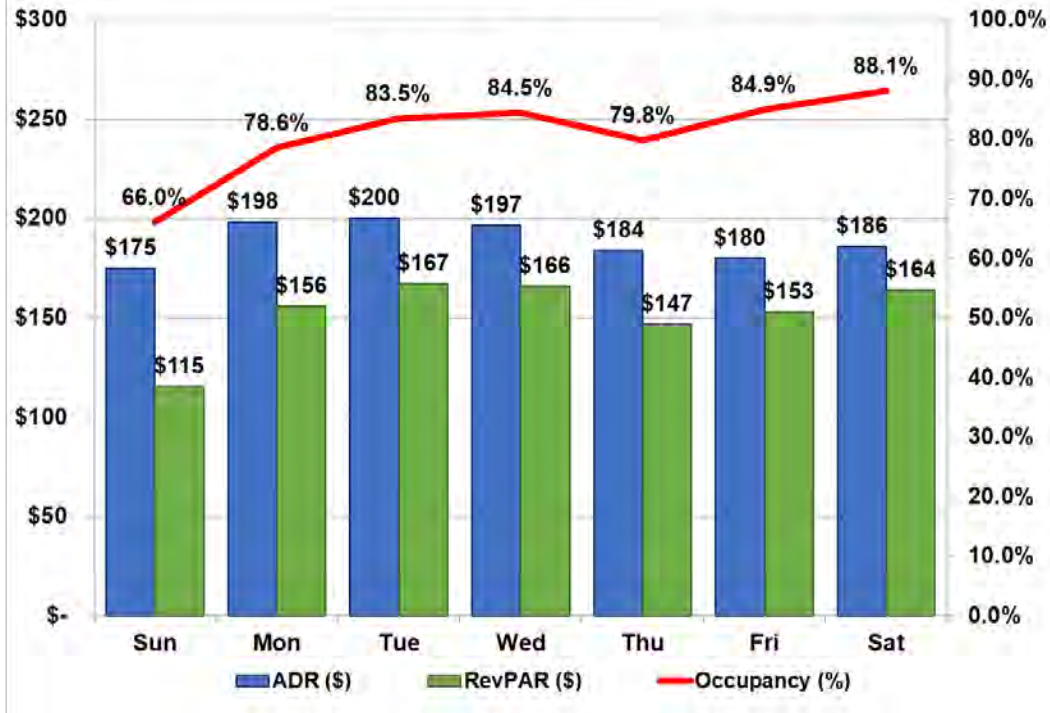


Figure 23: Hotel Market Set RevPAR by Month of Year

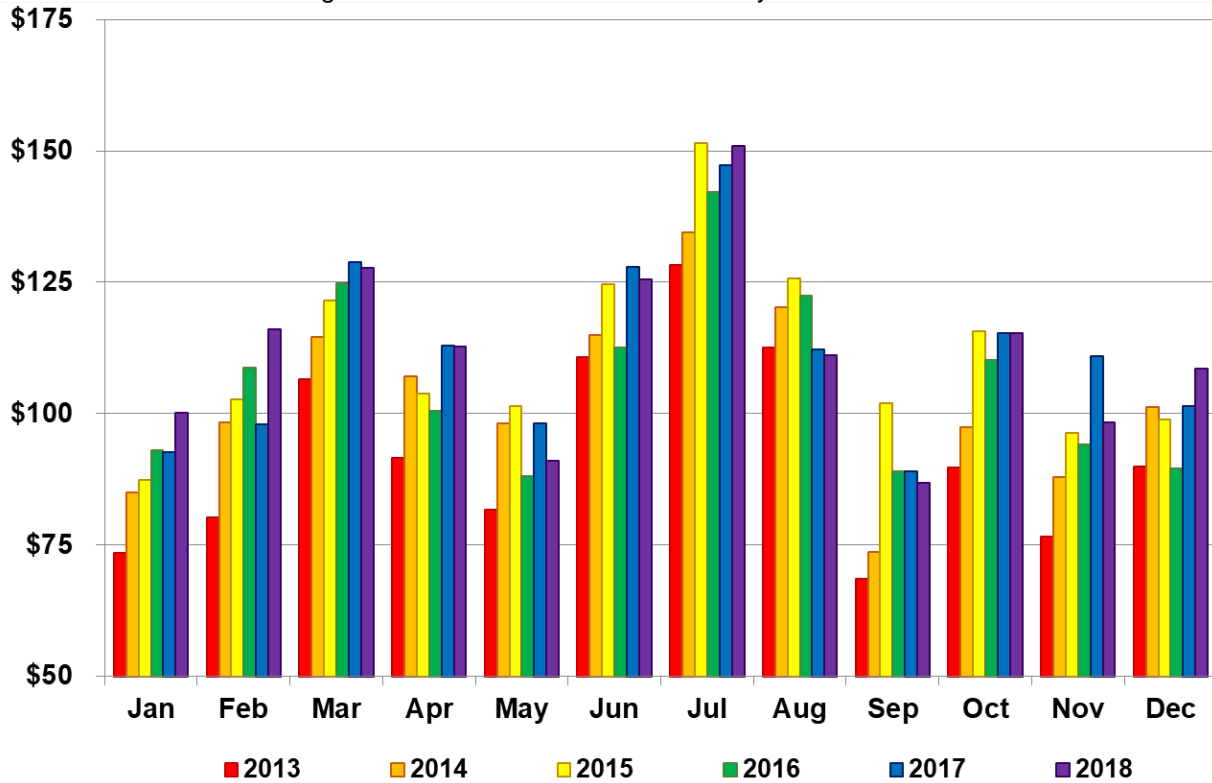
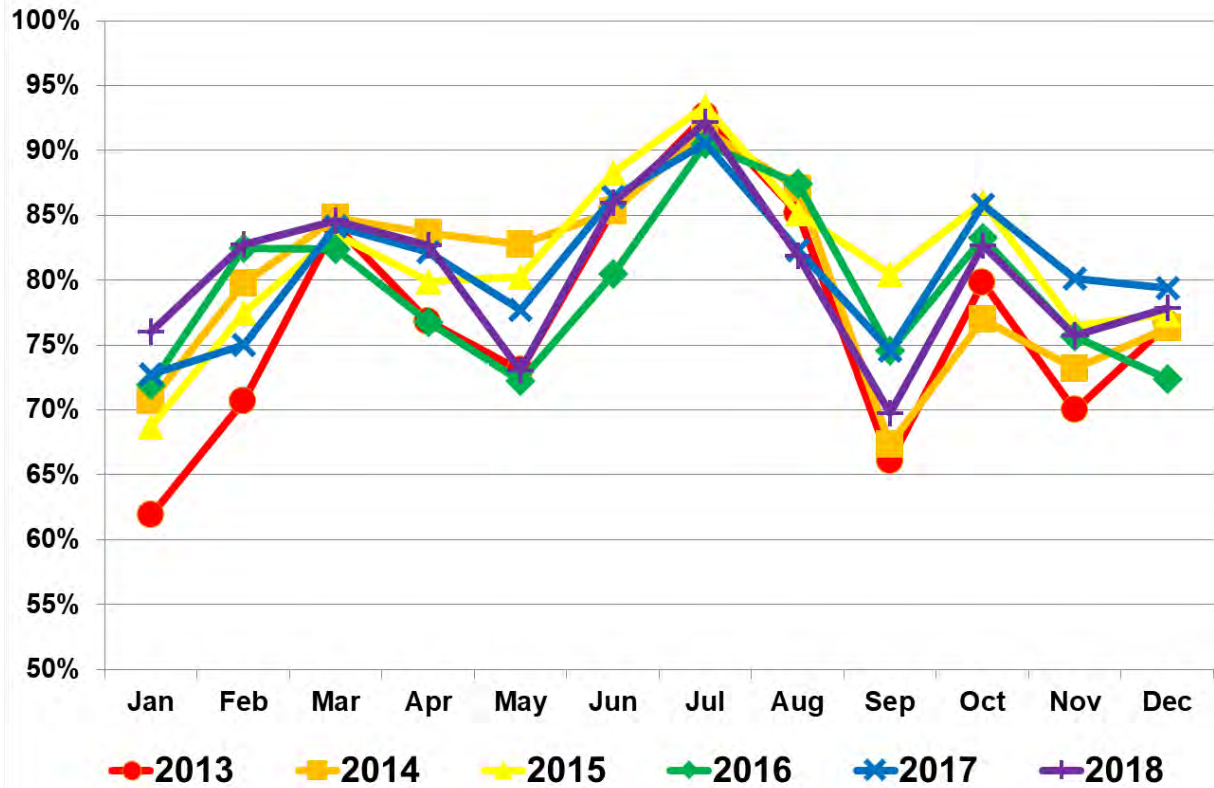


Figure 24: Hotel Market Set Occupancy by Month of Year



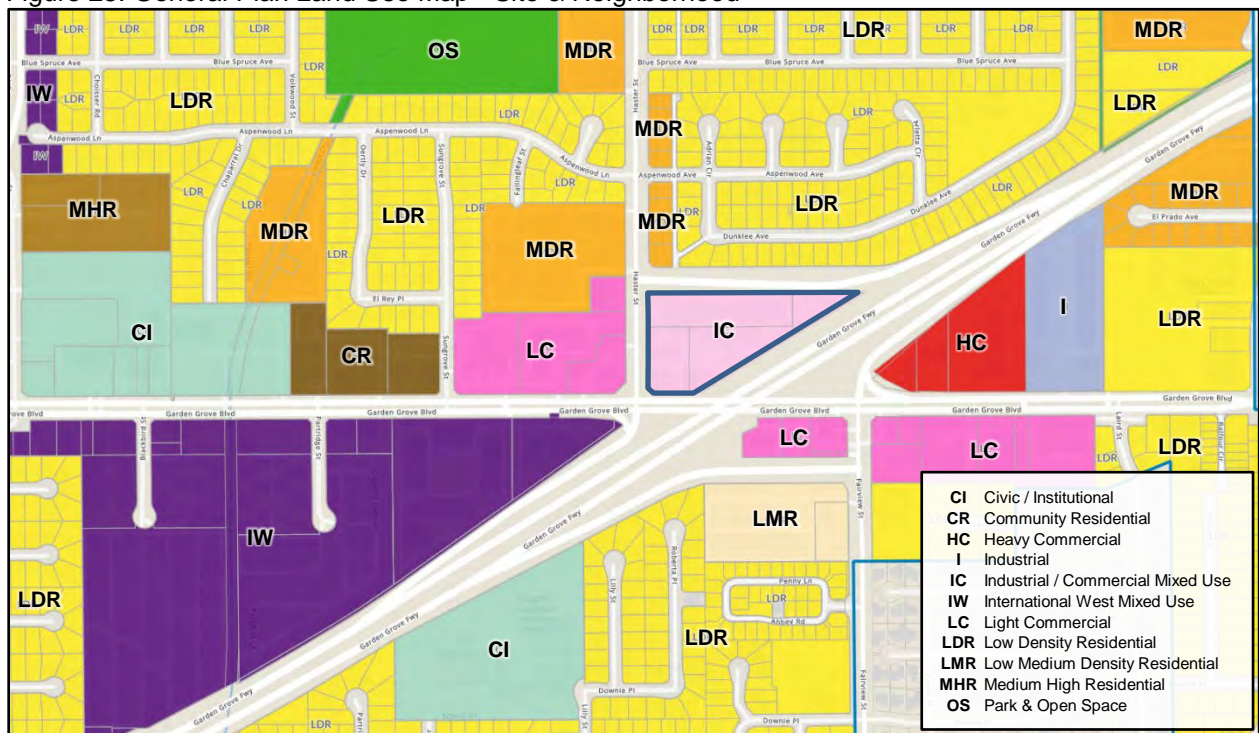
# 5.0 Permitted Development

Development of the Site is guided by the City’s General Plan, and Zoning Code. A summary of each as they pertain to the Site follows in this Section.

## 5.1 General Plan

The City’s General Plan appears to have last been updated in 2008, and provides a land use designation for the Site of IC, or Industrial / Commercial Mixed Use. The General Plan indicates that there is not currently a commensurate zoning designation, though describes the land use as intended to provide for a mix of industrial and commercial uses with a development intensity / Floor Area Ratio (“FAR”) of 0.50 for both industrial and commercial uses. A map of the land use designations under the City’s General Plan for the Site, and proximate area follows in Figure 25 below.

Figure 25: General Plan Land Use Map - Site & Neighborhood

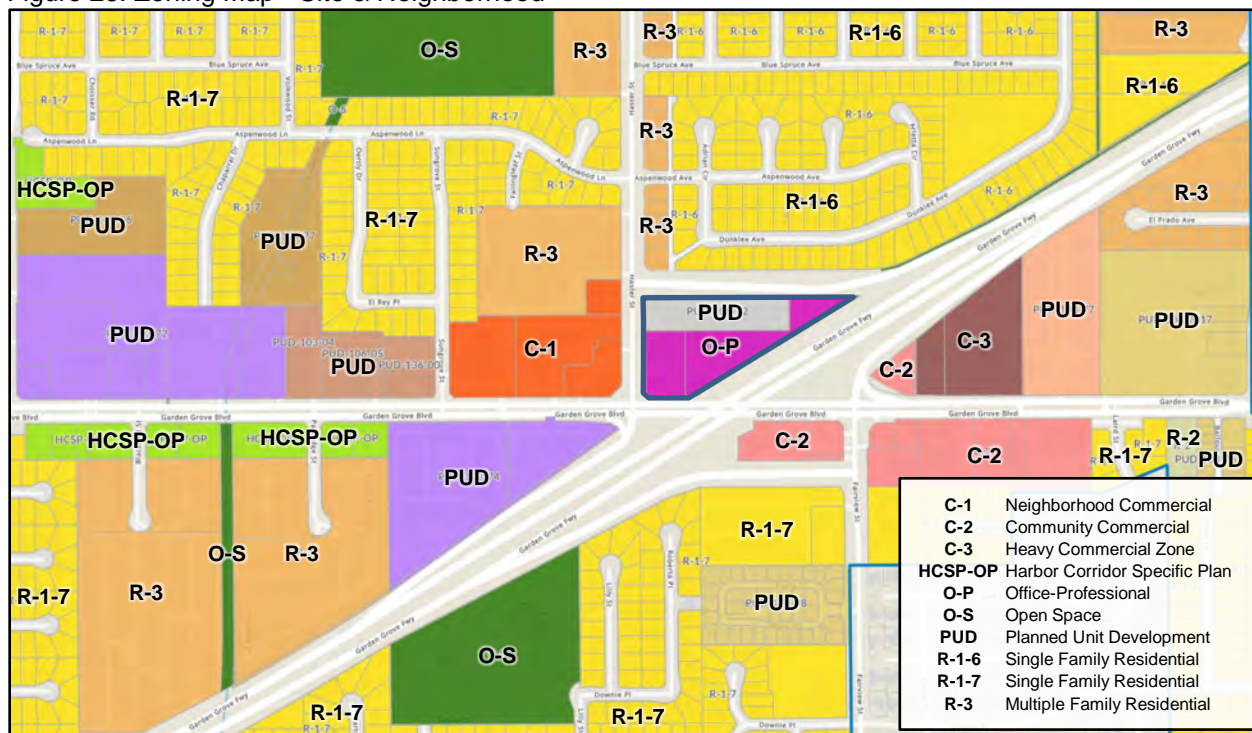


## 5.2 Zoning

Portions of the Site are currently zoned PUD, or Planned Unit Development (the industrial portion of the Site, typically what is there is what is permitted), and the balance is currently zoned O-P, or Office-Professional. The O-P zone generally provides for office and some commercial uses. Development with the O-P zone is limited to two stories and 35 feet in height, and generally requires setbacks on a corner lot of 15 feet along the “front”, and 10 feet along the balance of the

sides and rear. Kosmont did not identify a limitation on maximum development intensity other than the 0.5 FAR listed in the general plan. A map of the zoning designations under the City's Zoning Code for the Site, and proximate area follows in Figure 26 below.

Figure 26: Zoning Map - Site & Neighborhood



### 5.3 Permitted Uses in O-P Zone

As might be expected, a variety of office-oriented uses are explicitly permitted in the O-P zone, however a variety of other uses are also permitted or conditionally permitted uses. Permitted uses that may be of interest for reuse of O-P zoned portions of the Site include drug stores, and medical offices. A full list of permitted and conditionally permitted uses in commercial zones in the City is provided in Appendix: A.

### 5.4 Potential for Other Uses

Based on a review of development proximate to the Site, there appears to be precedent in the City to permit specific development programs that deviate from existing zoning through the Planned Unit Development process. To the extent the District desires to reuse the Site with uses that are not permitted under the current zoning, it could pursue the development of a specific program and use under the PUD process.

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## 6.0 Site Reuse & Valuation

In this section, general Site attributes, disposition options and valuation are discussed.

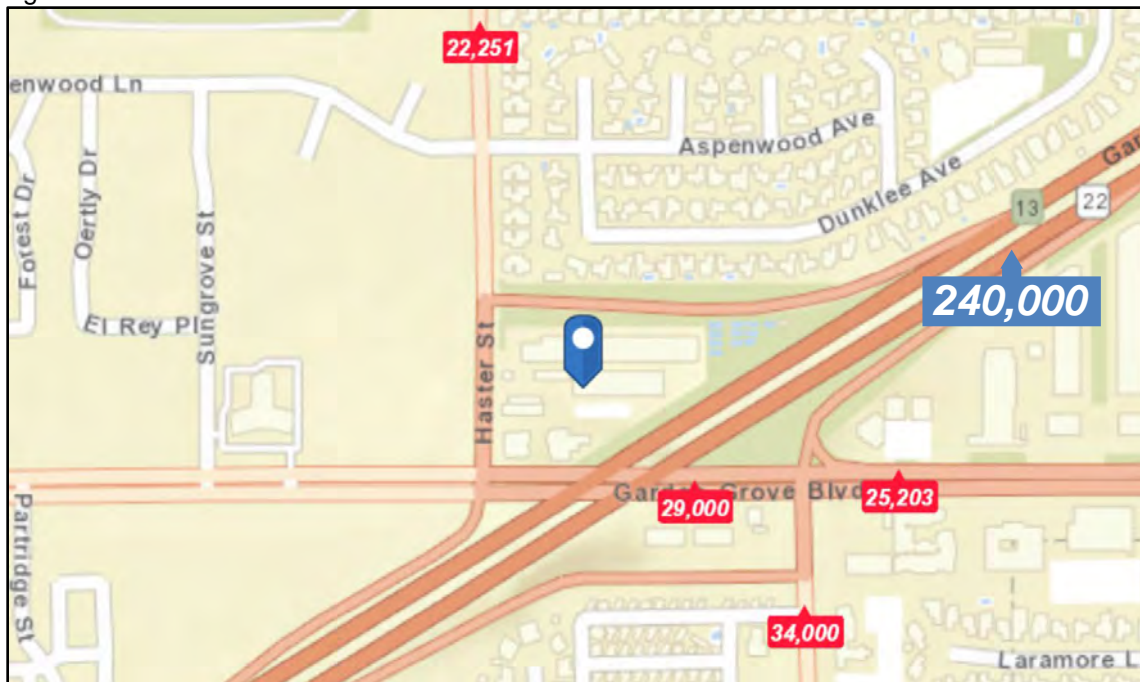
### 6.1 General Site Attributes

- The Site is irregularly shaped due to its boundary with State Route 22. Despite the irregular shape, the Site's size is likely sufficient to permit efficient utilization of most or all of the Site.
- The Site has exceptional proximity and potential visibility to/from State Route 22. Potential owners or tenants may pay a premium for the advertising value locating on the Site could provide.
- The streets adjacent to the Site have high volumes of vehicular traffic that may be desirable to particular users.
- The Site may be marginally difficult to access for certain retail and commercial uses due to adjacent street configurations and right in / right out only configuration.
- The Site is on a commercial corridor with a precedent for buildings with notable massing.

### 6.2 Proximate Traffic Counts

The Site is located at the northeast corner of Haster Street and Garden Grove Boulevard and is bounded by State Route 22 along the eastern portion of the Site. As illustrated in Figure 27 below, these roadways have approximately 22,000, 29,000, and 240,000 average daily vehicular trips, respectively.

Figure 27: Proximate Traffic Counts



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### **6.3 Outright Sale**

Should the District desire to raise capital to support the acquisition and/or construction of a new facility at another location, it could do so by selling its existing Site and facility. A summary of the potential revenue that could be generated through a sale is discussed below.

#### **Office Portion of Site**

Based on measurements from Site aerials, it appears that the office / lab buildings on the Site encompass approximately 13,500 square feet, and the other warehouse / maintenance buildings total more than 25,000 square feet. Given the purpose-built nature of the facilities it may be difficult to find a purchaser of the property in its current configuration. Based on a review of the local market and comparables, it is preliminarily estimated that the District could sell the Office portion of the Site in the near term for approximately \$225 to \$275 per square foot of office space (approximately 13,500 square feet), plus approximately \$75 to \$100 per square foot of other enclosed space (approximately 25,000 square feet) or approximately \$4.91 million to \$6.21 million. For reference, this is equivalent to approximately \$35 to \$44 per square foot of land area (based on 3.24 acres).

#### **Industrial Portion of Site**

Pursuant to Assessor records, the industrial building on the northern portion of the Site is approximately 34,800 square feet and sits on a 1.95-acre parcel. Based on a review of the local industrial market and comparables, it is estimated that the District could sell this portion of the Site in the near term for approximately \$150 to \$200 per square foot, or approximately \$5.22 million to \$6.96 million. For reference, this is equivalent to approximately \$61 to \$83 per square foot of land area (based on 1.95 acres).

#### **Site Residual Land Value**

While the improvements on the Site have economic value, the Site's underlying attributes could drive a residual land value that could readily exceed the improved value of the office portion of the Site, and potentially even the industrial portions of the Site. Kosmont considered a hypothetical development program that would include the construction of an approximately 125-room limited or select service hotel and a separate 10,000 to 15,000 square foot retail component (i.e. national credit restaurant / retail pads). Kosmont anticipates that such a development program would readily support land values of \$40 per square foot, though may even be able to support values of \$60 per square foot. Assuming these land values on the approximately 3.24-acre office portion of the Site would yield a residual land value of \$5.65 million to \$8.47 million.

### **6.4 Lease**

Instead of selling the District's interest in the Site as contemplated above, the OCMVCD could elect to retain ownership of the Site, and lease the Site to other users, thereby realizing ongoing



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cashflow. Given the District's potential cost of financing, and the current area capitalization rates, the District could realize more gain from leasing the Site than from selling it outright. Further, under a lease scenario, the District could benefit from increases in lease revenue that typically occur with time. Based on a review of local market conditions, Kosmont estimates that the OCMVCD could yield approximately \$250,000 to \$500,000 per year from the office portion of the Site (likely through a ground lease, value ultimately dependent on permitted uses), and approximately \$350,000 to \$500,000 per year from the industrial portion of the Site. Thus, a lease of the full Site would be estimated to yield annual lease revenues of approximately \$600,000 to \$1,000,000 per year, and could represent an approximately 6% yield on the potential sale value.

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## 7.0 Site Relocation Options

To the extent that the District elects not to modernize its current facility, it could elect to relocate to an existing building or construct a new facility elsewhere. A discussion of hypothetical relocation considerations and options follow herein.

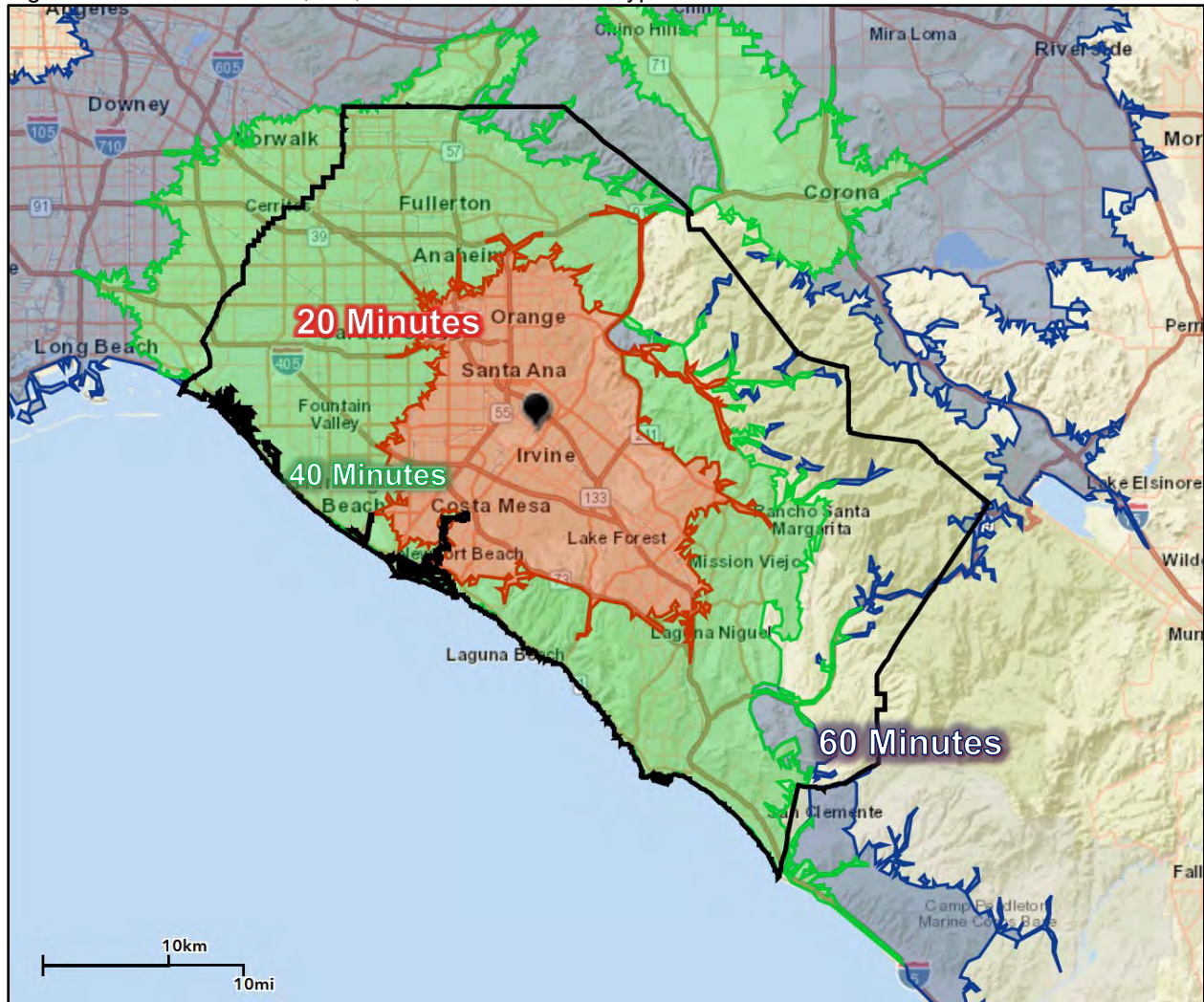
### 7.1 Centrality

Given the nature of the OCMVCD'S vehicle fleet operations, the location of the District's facility can have an impact on overall operational efficiency. To the extent that the facility is located in the centroid of service trips, it can help increase utilization of employee time in service at a site rather than in transit to a site. For reference, the centroid may not be the center of the service area (i.e. Orange County), as greater levels of service may be provided within certain areas of the County (i.e. more densely populated areas) than others. Regardless, sample drive time maps for the existing Site, and a hypothetical location slightly southeast of the current Site follow in Figure 28 and Figure 29 below.

Figure 28: Area Within 20-, 40-, & 60-Minute Drive of Existing Site



Figure 29: Area Within 20-, 40-, & 60-Minute Drive of Hypothetical Site



## 7.2 Purchase & Reconfigure Existing Building

Under this scenario the District would purchase an existing building and reconfigure the building as appropriate for its needs. A sample evaluation of two buildings currently being marketed for sale in the area follow.

### 2700-2722 South Fairview Street

Under this hypothetical scenario the District would purchase a facility that may exceed its current operational needs and lease out any space not needed to a third party. This particular building encompasses approximately 117,000 square feet, roughly half of which is occupied by an existing tenant with a lease through 2021. Pursuant to discussions with KTS, this acquisition would likely require the use of taxable financing, though the subleased space could yield income of \$550,000 to \$650,000 per year to help support the OCMVCD's acquisition costs. Further, at approximately \$185 per square foot, even if some functional renovations are required, this building would be

expected to cost less than the cost of constructing a new facility. Additional details on this building follow in Figure 30 through Figure 32.

Figure 30: 2700-2722 South Fairview Street - Profile & Location Map

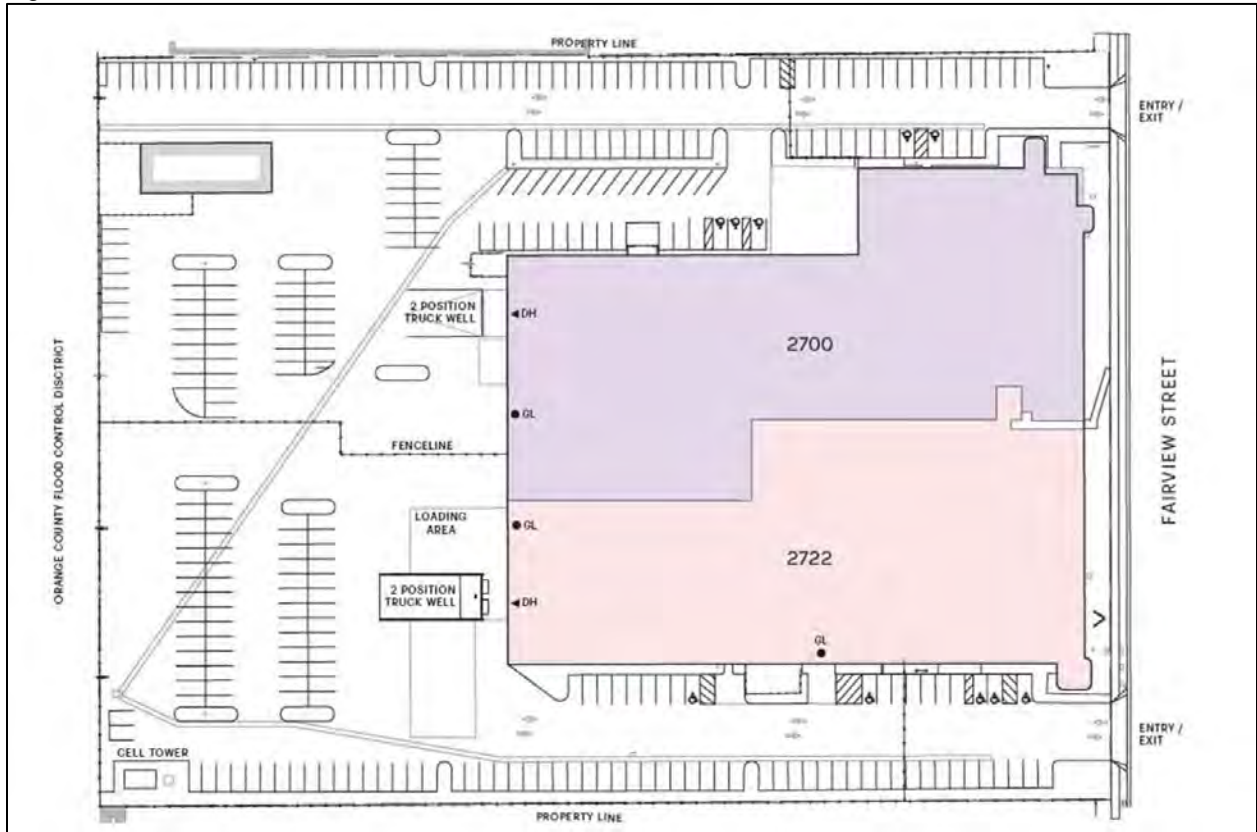
<b>Asking Price</b>	\$ 21,600,000
<b>Lot Acres</b>	6.50
<b>Gross Building Area (SF)</b>	116,575
<b>Office/R&amp;D Space (SF)</b>	~ 21,500
<b>Cost / Gross SF</b>	\$ 185



Figure 31: 2700-2722 South Fairview Street – Street View



Figure 32: 2700-2722 South Fairview Street – Site Plan



Source: JLL

## 2814 Dow Avenue

Under this hypothetical scenario the District would purchase a facility that it would occupy exclusively. This building encompasses approximately 84,000 square feet, roughly half of which is set up as an administrative office / corporate headquarters (two story office layout, roughly 1/3<sup>rd</sup> of the building footprint). At approximately \$200 per square foot, even if some functional renovations are required, this building would be expected to cost less than the cost of constructing a new facility. Additional details on this building follow in Figure 33 through Figure 35.

Figure 33: 2814 Dow Avenue Profile & Location Map

<b>Asking Price</b>	\$ 16,750,000
<b>Lot Acres</b>	4.3
<b>Gross Building Area</b>	84,176
<b>Office/R&amp;D Space</b>	~ 40,000
<b>Cost / Gross SF</b>	\$ 199



Figure 34: 2814 Dow Avenue – Street View

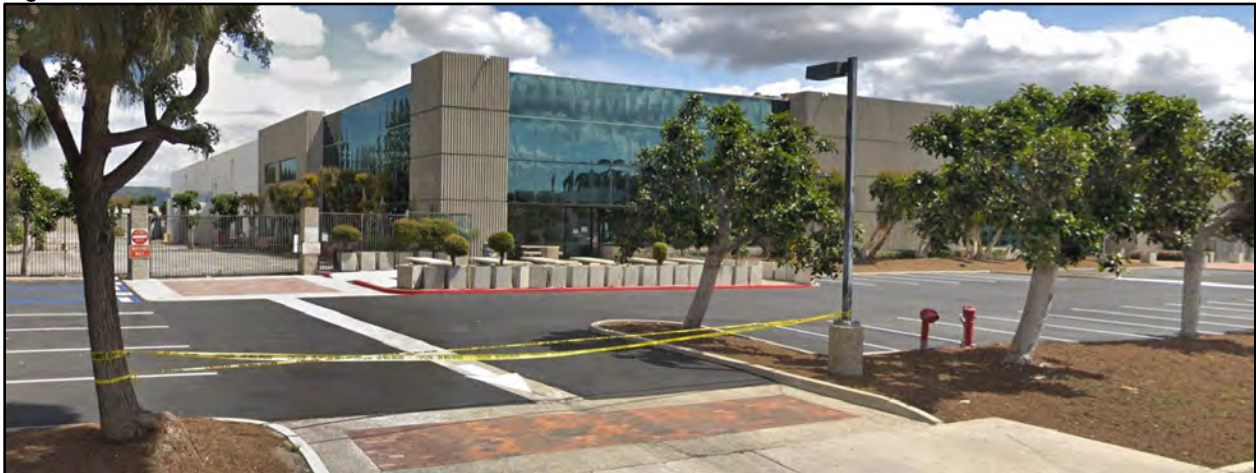
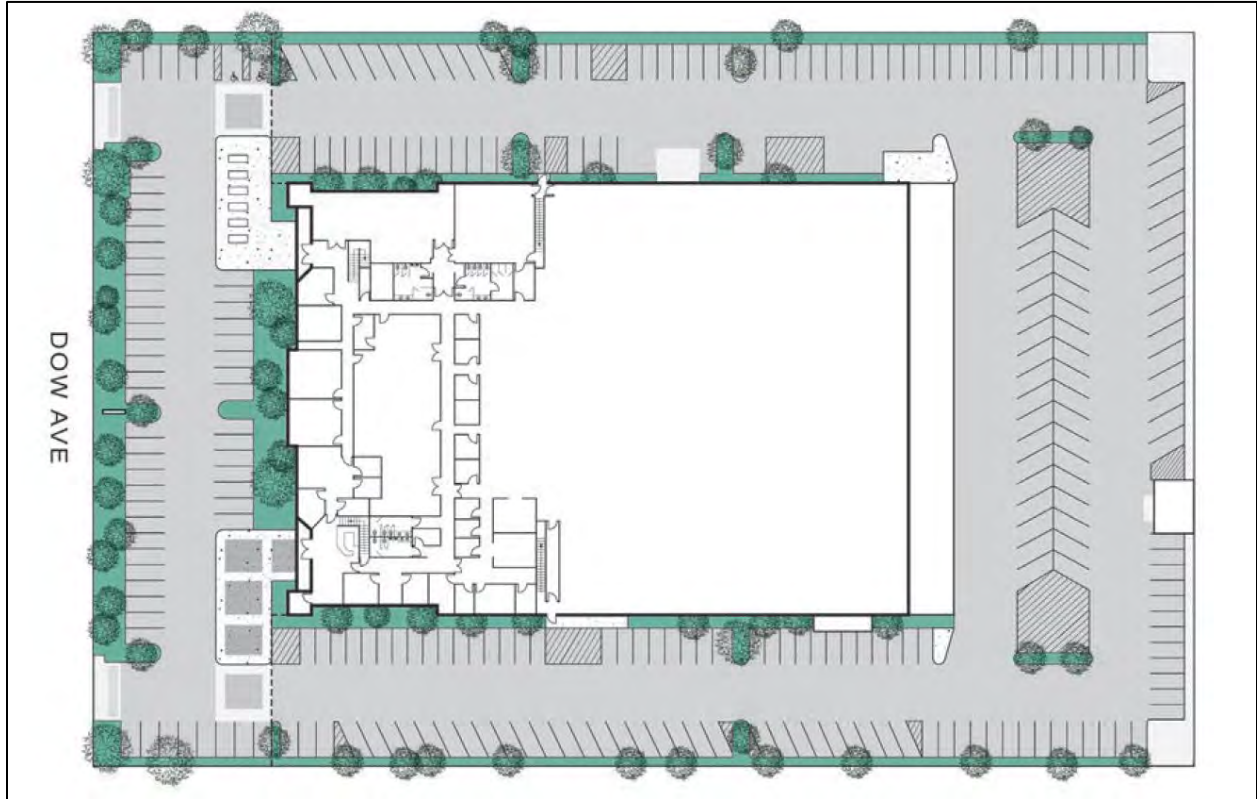


Figure 35: 2814 Dow Avenue – Site Plan



Source: Voit Real Estate Services



### 7.3 Purchase or Lease Land and Construct Building

Under this scenario the District would identify vacant or underutilized land to purchase or lease and construct a new facility on. Kosmont did not readily identify a parcel of land for sale that may be suitable for the OCMVCD’s needs, though did identify one site available for lease and use in a hypothetical evaluation.

#### Advance Technology & Education Park

This site is owned by the South Orange County Community College District (“SOCCCD”) and is subject to a deed restriction that will be in place for 34 more years that only permits SOCCCD to lease the Site (for terms up to 99 years). The site is subdivisible to user driven sizes, though SOCCCD does desire that users have an educational component (i.e. the District’s lab). The Site is offered at \$118,440 per acre per year. Given a 5-7% capitalization rate this would be equivalent to approximately \$1.69 million to \$2.37 million in value per acre. Assuming the District required five acres of land, it would cost the OCMVCD approximately \$600,000 per year to lease this land. This annual outlay would be in addition to the cost of constructing facility improvements, which as identified in Table 2 on page 10 could be substantial. Given the alternative options available to the District, Kosmont would be unlikely to recommend the District procure land through a ground lease such as this. A site plan and location map of this site is provided in Figure 36 below.

Figure 36: ATEP Site Plan & Location Map



Source: NAI Capital

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## 8.0 Conclusion

As discussed, and illustrated herein, it is Kosmont's conclusion that the preferred option for the District may be to (i) identify and purchase an existing building to relocate its headquarters to, (ii) lease out the industrial portions of its current Site in their current configuration, and (iii) solicit interest in leasing the balance of the Site to a single user in the current configuration or as a ground lease for an alternative commercial development. The District could then use the lease revenue from its existing Site to help support the cost of acquisition, renovating (as necessary), and ongoing maintenance of its new facility.

A summary of the various facility modernization / replacements options and primary revenue options evaluated herein follow below. All conclusions are subject to refinement and/or modification upon completion of the District's facility needs assessment.

### Facility Modernization / Replacement Options

	<b>Scenario</b>	<b>Description / Comments</b>	<b>Estimated Cost*</b>
<b>1</b>	Construct New Facility on Existing Site	Build to suit for operational uses, cost of improvements	\$30 - 45 MM
<b>2</b>	Purchase Different Building on Another Site	Purchase existing building on another site, renovate as needed for operational uses	\$20 - 30 MM
<b>3</b>	Construct New Facility on Another Site	Build to suit for operational uses, cost of improvements plus land	\$40 - 60 MM

*\*Preliminary estimates, to be refined based on needs assessment concurrently being completed by OCMVCD.*

Scenario	Primary Revenue Options		Estimated Annualized Cost
	Estimated One-Time Revenue	Estimated Annual Revenue	
<b>A Sell Existing Site</b>			
Office / Warehouse Portion	\$5.6 - \$8.5 MM		
Industrial Portion	\$5.2 - \$7.0 MM		
<b>B Lease Existing Site</b>			
Office / Warehouse Portion		\$250,000 - \$500,000	
Industrial Portion		\$350,000 - \$500,000	
<b>C Financing</b>			
Approximate Debt Service	\$10 MM		\$575,000 - \$600,000
(Tax exempt financing, 30-year term)	\$25 MM		\$1.4 - \$1.5 MM
	\$40 MM		\$2.3 - \$2.4 MM

*Note: Estimated Site values are based on ranges that are expected to represent marginal decreases from current market conditions and slight premiums on current market conditions.*

All analysis and conclusions herein are based on preliminary and hypothetical building programs. The estimates herein should be considered order of magnitude estimates, and could vary substantially from actual results once specific building programs are established.

The analyses, projections, assumptions, rates of return, and any examples presented herein are for illustrative purposes and are not a guarantee of actual and/or future results. Project pro forma and tax analyses are projections only. Actual results may differ materially from those expressed in this analysis.

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## 9.0 Appendices

## Appendix: A

### Uses Permitted Within Various Zones

#### Legend

**P: Permitted Use. (Automatic)**

**I: Incidental Use.** Use permitted only if incidental to another primary use on the same site. If incidental to a use authorized by a conditional use permit, such incidental use is permitted only if included within the terms of the conditional use permit.

**C: Conditional Use.** Use eligible for consideration under the conditional use procedures and permitted only if the conditional use permit is approved, subject to the specific conditions of such permit.

**\*: Special Conditions.** Use shall be subject to special conditions or specific restrictions as listed in this section.

**—: Not a permitted use.**

<b>Residential Care Uses</b>	<b>O- P</b>	<b>C- 1</b>	<b>C- 2</b>	<b>C- 3</b>	<b>M- 1</b>	<b>M- P</b>	<b>O- S</b>
Child Day Care Center	—	C	C	—	—	—	—
Community Care Facility, Residential (7 Persons or More)	C	C	—	—	—	—	—
Emergency Shelter (Homeless)	—	—	—	—	P*	—	—
Intermediate Care Facility	C	C	—	—	—	—	—
Residential Care Facility for the Elderly (RCFE) (7 persons or more)	C	C	—	—	—	—	—
Skilled Nursing Facility	C	C	—	—	—	—	—

<b>Offices and Related Uses</b>	<b>O- P</b>	<b>C- 1</b>	<b>C- 2</b>	<b>C- 3</b>	<b>M- 1</b>	<b>M- P</b>	<b>O- S</b>
Administration/Business	P	P	P	—	—	—	—
Banks/Financial Institution	P	P	P	P	P	—	—
Medical, Dental and Related Health Service Support Facilities	P	P	P	—	C	—	—
Prescription Pharmacy	P	P	P	P	—	—	—
Professional and Clerical	P	P	P	—	—	—	—
Public Utility (Commercial)	P	P	P	P	P	—	—

<b>Professional Studios</b>	<b>O- P</b>	<b>C- 1</b>	<b>C- 2</b>	<b>C- 3</b>	<b>M- 1</b>	<b>M- P</b>	<b>O- S</b>
Art, Music and Dance	P	P	P	—	—	—	—
Arts and Crafts	P*	P*	P*	—	—	—	—
Photography	P	P	P	—	—	—	—
Portrait	P	P	P	—	—	—	—
Radio/TV	C	C	C	C	C	—	—
Recording	C	C	C	C	C	—	—

<b>Personal Service</b>	<b>O- P</b>	<b>C- 1</b>	<b>C- 2</b>	<b>C- 3</b>	<b>M- 1</b>	<b>M- P</b>	<b>O- S</b>
Athletic and Health Clubs, Gyms	—	C	C	C	—	—	C*
Athletic and Health Clubs, Spas, or Gyms with Massage	—	—	C*	—	—	—	—
Barber/Beauty Shop	P	P	P	P	—	—	—
Dry Cleaning - Retail Only	—	P	P	P*	—	—	—

Fortunetelling	—	—	C	C	—	—	—
Laundromat (Coin-op)	—	P	P	P	—	—	—
Massage Establishment	—	—	C*	—	—	—	—
Physical Therapy (Medical Use)	P	P	P	—	C	—	—
Shoe Repair	—	P	P	—	—	—	—
Tailor/Dressmaking	—	P	P	—	—	—	—
Tanning Parlor	—	P	P	—	—	—	—
Tattoo, Facial	I	I	P	—	—	—	—
Tattoo, General	—	—	P	—	—	—	—
<b>Tourist Services</b>	<b>O- P</b>	<b>C- 1</b>	<b>C- 2</b>	<b>C- 3</b>	<b>M- 1</b>	<b>M- P</b>	<b>O- S</b>
Extended-Stay Business Hotel	—	C*	C*	—	—	—	—
Hotel, Motel	—	C*	C*	C*	C*	—	—
Recreation Vehicle Park	—	C	C	—	—	—	—
Ticket Agency	—	P	P	P	P	—	—
Travel Agency	—	P	P	P	P	—	—
<b>Recreation, Amusement, Entertainment</b>	<b>O- P</b>	<b>C- 1</b>	<b>C- 2</b>	<b>C- 3</b>	<b>M- 1</b>	<b>M- P</b>	<b>O- S</b>
Adult Entertainment	—	—	C*	—	—	—	—
Arcades	—	—	C*	—	—	—	—
Billiards/Pool Hall	—	—	C*	—	—	—	—
Bowling Alley	—	—	C	C	—	—	—
Cybercafés	—	C*	C*	C*	—	—	—
Golf Courses (Regulation)	—	C*	C*	C*	—	—	C*
Golf Driving Ranges	—	C*	C*	C*	—	—	C*
Incidental Amusement Devices	—	I*	I*	I*	I*	—	—
Indoor Sports Facility	—	—	—	—	—	C*	—
Movie Theaters	—	C	C	—	—	—	—
Private Clubs and Lodges	—	C	C	—	—	—	C*
Skating Rinks	—	—	C	C	—	—	—
Tennis, Swimming Clubs	—	C	C	C	—	—	C*
Water Oriented Parks	—	—	—	C*	—	—	C*
<b>Retail Trade</b>	<b>O- P</b>	<b>C- 1</b>	<b>C- 2</b>	<b>C- 3</b>	<b>M- 1</b>	<b>M- P</b>	<b>O- S</b>
Antique Shops	—	P	P	—	—	—	—
Apparel: Clothing, Shoes and Accessories	—	P	P	—	—	—	—
Auctions	—	—	—	P	P	—	P
Books, Magazines, Newsstand (in building)	I	P	P	P	—	—	—
Building Supply, Plumbing Shop	—	—	P	P	P	—	—
Department Stores	—	P	P	P	—	—	—
Drug Stores	P	P	P	P	—	—	—
Florists	I	P	P	P	—	—	—
Furniture, Carpets, Household Appliances	—	P	P	P	—	—	—
Gifts and Souvenirs	I	P	P	I	I	—	—
Hardware, Paint	—	P	P	P	—	—	—
Hobby Shop	—	P	P	—	—	—	—
Indoor Multi-Tenant Retail Shopping Center	—	C*	C*	C*	—	—	—
Jewelry, Cameras and Supplies, Luggage	—	P	P	—	—	—	—
Nonvehicular Vending, Long term	—	C	C	—	—	—	—

Nurseries	—	P	P	P	—	—	—
Pawnshop, Secondhand Store	—	—	P	P	—	—	—
Pets and Pet Supplies	—	P*	P*	—	—	—	—
Sporting Goods	—	P	P	P	—	—	—
Stationery and Office Supplies - No Furniture	P	P	P	—	—	—	—
Toys	—	P	P	P	—	—	—
Variety, Dry Goods Stores	—	P	P	—	—	—	—
<b>Food/Drink Sales and Service</b>	<b>O- P</b>	<b>C- 1</b>	<b>C- 2</b>	<b>C- 3</b>	<b>M- 1</b>	<b>M- P</b>	<b>O- S</b>
Bar/Nightclub	—	—	C*	C*	—	—	—
Candy, Confectionery	—	P	P	P	—	—	—
Convenience, Grocery	—	P	P	P*	—	—	—
Delicatessen	—	P	P	P*	C*	C*	—
Eating Establishment/Restaurant							
With Alcoholic Beverage Sales	—	C*	C*	C*	C*	C*	—
No Alcoholic Beverage Sales	—	P	P	P	P	P	—
Eating Establishment/Restaurant With Entertainment	—	C*	C*	C*	—	—	—
Eating Establishment/Restaurants with Outdoor Seating	—	P	P	P	P	P*	—
Food Catering	—	I	I	P*	P*	—	—
Ice Cream, Bakery (retail only)	—	P	P	P	—	—	—
Liquor Store	—	C*	C*	—	—	—	—
Meat Market	—	P	P	P*	—	—	—
Mini-Market with Gas	—	C*	C*	C*	—	—	—
Supermarket	—	C*	P*	P*	—	—	—
<b>Vehicle Sales and Service</b>	<b>O- P</b>	<b>C- 1</b>	<b>C- 2</b>	<b>C- 3</b>	<b>M- 1</b>	<b>M- P</b>	<b>O- S</b>
Auto Parts, Accessories							
No Installations	—	P	P	P	—	—	—
Installations	—	—	P	P	—	—	—
Auto Lease/Rental	—	—	P	P	—	—	—
Auto Repair (including paint or body work)	—	—	C*	P	P	P*	—
Automatic Car Wash	—	—	C*	C*	—	—	—
Bicycle Repair	—	P	P	P	—	—	—
Bicycle Sales/Rental	—	P	P	—	—	—	—
Boat Repair	—	—	—	C	C	—	—
Boat Sales	—	—	—	C*	C*	—	—
Bus/Truck Repair	—	—	—	C	P	—	—
General Auto Repair	—	—	P	P	P	—	—
Minor Auto Maintenance	—	C	P	P	P	—	—
Motorcycle Sales	—	—	—	—	C*	—	—
Motor Vehicle Sales (New)	—	—	C*	C*	—	—	—
Motor Vehicle Sales (Used)	—	—	C*	C*	—	—	—
Self-Service or Coin-Operated Car Wash	—	C*	C*	C*	—	—	—
Service Stations (new and conversion of existing)	—	C*	C*	C*	C*	—	—
Tire Sales and Service	—	C	P	P	P	—	—
Truck, Trailer Rental	—	I*	I*	P*	P*	—	—
Vehicle Storage Yard	—	—	—	C	C	—	C
<b>Other Services</b>	<b>O- P</b>	<b>C- 1</b>	<b>C- 2</b>	<b>C- 3</b>	<b>M- 1</b>	<b>M- P</b>	<b>O- S</b>
Ambulance Service	C*	—	C*	C*	—	—	—
Blueprint/Photo Engraving, Newspaper Printing	—	—	P	P	P	—	—

Cleaning/Dyeing Plant	—	—	—	—	P	—	—
Commercial Laundry	—	—	—	P	C	—	—
Crematoriums	—	—	—	C*	C*	C*	—
Crematoriums with Incidental Funeral Home/Mortuary	—	—	—	C*	C*	C*	—
Day Care Facility, Adult	—	C	—	—	—	—	—
Equipment Rental	—	—	P	P	P*	—	—
Funeral Home/Mortuary with No Crematorium	—	—	P*	P*	—	—	—
Glass Studio	—	—	P	P	P	—	—
Graphic Arts/Photocopying	P	P	P	P	P*	P*	—
Home Improvement Center	—	—	P	P	P*	C*	—
Kennel	—	—	—	P*	P*	—	—
Neighborhood Recycling Center	—	I	I	I	—	—	—
Parking Facilities (For Fee)	C	C	C	C	C	C	—
Pet Grooming	—	P*	P*	—	—	—	—
Public Scales	—	—	—	—	P	—	—
Small Animal Hospital/Veterinary	—	C*	P	P	P*	—	—
Smoking Lounge	—	—	C*	C*	—	—	—
Upholstery	—	—	P	P	P*	—	—
<b>Manufacturing</b>	<b>O- P</b>	<b>C- 1</b>	<b>C- 2</b>	<b>C- 3</b>	<b>M- 1</b>	<b>M- P</b>	<b>O- S</b>
Bottling Plant	—	—	—	—	P	—	—
Food Products, Dairy Products, and Bakery Products	—	—	—	—	P*	P*	—
Manufacture, Assembly, and Repair of Precision Optics, Electronics, and Electrical Instruments and Equipment	—	—	—	—	P	P	—
Manufacture, Assembly, Compounding, or Treatment of Materials and Products, Except as Otherwise Listed	—	—	—	—	P	P	—
Laboratories, Chemical, Dental, Electrical, Optical, Mechanical, and Medical	—	—	—	—	—	P	—
Light Manufacture	—	—	—	—	P	P	.
<b>Storage</b>	<b>O- P</b>	<b>C- 1</b>	<b>C- 2</b>	<b>C- 3</b>	<b>M- 1</b>	<b>M- P</b>	<b>O- S</b>
Contractors Storage Yards	—	—	—	C	C	C	—
Frozen Food Lockers	—	—	—	P	P	—	—
Lumber Yards and Material Storage Yards	—	—	—	C	C	C	—
Parcel Delivery Service	—	—	P	P	P	P	—
Regional Recycling Center	—	—	—	—	C	C	—
Warehouses and Storage Buildings, Regular	—	—	—	—	P*	P	—
Warehouses and Storage Buildings, Mini	—	—	—	P	P	P	—
<b>Transit/Transportation</b>	<b>O- P</b>	<b>C- 1</b>	<b>C- 2</b>	<b>C- 3</b>	<b>M- 1</b>	<b>M- P</b>	<b>O- S</b>
Airport/Helistop	—	—	—	C	C	C	C
Automobile Fleet Storage	—	—	—	C	P	—	—
Draying, Freight or Trucking Yards	—	—	—	—	C	C	—
Tire Retreading or Recapping	—	—	—	—	P	—	—
Trailer, Truck or Bus Terminal	—	—	—	—	C	—	—
<b>Public &amp; Semi-Public</b>	<b>O- P</b>	<b>C- 1</b>	<b>C- 2</b>	<b>C- 3</b>	<b>M- 1</b>	<b>M- P</b>	<b>O- S</b>
Cemetery	—	—	—	—	—	—	C
Church and Other Religious Centers	—	C	C	—	—	—	C*
Commercial Radio/TV Towers	C*	C*	C*	C*	—	—	C*



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Educational Institutions	—	—	—	—	—	—	C*
Group Shelter	—	—	—	—	—	—	C
Half-way House	—	—	—	—	—	—	—
Hospital, Medical or Psychiatric	C	C	C	C	—	—	—
Public Buildings (Civic Center, Library, County, State or Federal)	C	C	C	C	C	C	C
Public Recreational Facilities	—	—	—	—	—	—	P
Public Safety Facilities (Fire, Police)	C	C	C	C	C	C	C
Public Utility Stations and Equipment Buildings	C	C	C	C	P	C	C
Religious School	—	—	—	—	—	—	C
Trade, Business School	—	C	C	C	—	—	—



# ORANGE COUNTY MOSQUITO AND VECTOR CONTROL DISTRICT

## AGENDA REPORT

Meeting Date

December 19, 2019

### AGENDA ITEM #

**Prepared By:** Rick Howard, District Manager  
**Submitted By:** Rick Howard, District Manager

### Agenda Title

Provide Direction to Staff pertaining to the District Office Relocation Plan

### Recommended Action

That the Board of Directors provide direction to the District Manager pertaining to the long-term facility needs of the District

### Executive Summary

The Orange County Mosquito and Vector Control District has occupied its present 3.24-acre site in Garden Grove since the District's formation in 1947. The District expanded its footprint in 2011 by acquiring the adjacent 1.95-acre Haster Business Park. The triangular sized site is landlocked and further build-out is restricted due to its proximity to Garden Grove Blvd to the south, Haster Blvd to the West, and the Haster exit from westbound SR22 to the north. The total site comprises three separate parcels, encompassing 5.19 acres. Presently, the current facilities are disjointed, aged (some going back to pre-World War II), and woefully inefficient. There are long term maintenance needs that must be addressed. Staff and work areas are spread out and distributed throughout five different buildings.

Throughout 2018 and into 2019, staff has met on numerous occasions with both the Budget and Finance Committee and the Building, Property and Equipment Committee. In early 2019, the two committees were officially established as a Joint Committee and Staff has been guiding the process since that time and has met regularly to update the Joint Committee as progress is made.

In 2018, the District engaged the architectural firm LPA to conduct a space plan analysis of the District and its many unique needs (Exhibit A). Once that plan was complete, it was presented to the Joint Committee for further evaluation and study. In January 2019, the Committee again met and gave direction to staff to work towards a recommendation to take to the full board by the end of 2019. In order for that to occur, the Committee recommended that LPA conduct a "site plan" analysis of the existing site and engage Kosmont Companies, a nationally recognized real estate, financial advisory and economic development services firm, to conduct a financial analysis of the District's financial ability to rebuild on site, build new elsewhere, or purchase existing facilities and renovate to meet the needs of the District.

On April 10, 2019 the Committee received a presentation from LPA on the site plan analysis performed by LPA (Exhibit B). Also, on April 10, 2019, the District entered into a contract with the Kosmont Companies to conduct an analysis and detailed strategy towards identifying the financial and practical long-term impacts to the District (Exhibit C). The final report included detailed facility options to: (1) build new facilities on site (\$30-\$45M); (2) relocate to an existing building not on the current site and improve to meet the needs of the District (\$20-\$30M); and (3) build a new facility on newly acquired land (\$40-\$60M). Based upon those three scenarios, Joint Committee directed staff to continue to explore 1 & 2 but to eliminate Option #3 as not fiscally practical.

During late Summer and into the Fall of 2019, staff and the Joint Committee met with city of Garden Grove staff, including its City Manager and Community Development Director to discuss alternative uses for the existing District property. Based on those discussions, it was recommended that the District retain the services of an environmental planning firm to initiate the process to establish an overlay zoning designation to include hotel uses. Current zoning is a combination of Industrial-Commercial and Office-Professional.

**Option #1 – Build new facilities on site and retain ownership of property:**

The District has the option to renovate and re-imagine the existing site through extensive demolition and new construction. Estimated to cost approximately \$30 to \$45M and take approximately three years from project start to full occupancy, this option provides the benefit that the District will continue to operate out of the existing location for decades to come. The current location is centrally located within the County and has easy freeway access.

Kosmont affiliate KTS performed a preliminary evaluation of the District's potential borrowing capacity based upon information provided by the District. That assessment indicated that the annual budget could potentially support debt service payments of approximately \$120,000 per month, or approximately \$1.44 million per year, resulting in an estimated borrowing capacity of approximately \$25 million through the issuance of bonds.

The District had previously established a Facilities Improvement Fund that as of June 30, 2020 will contain approximately \$8.0M for new construction, renovation or relocation. If the Board determined to renovate the existing campus location, the balance of the \$22M-\$37M needed to accomplish this task would require debt financing or some other form of financial augmentation. This approximately \$25M raised through debt financing would provide adequate financial coverage for the lower end of the estimated project costs, yet at the higher cost estimates the project would suffer from insufficient revenues to support annual debt service beyond \$1.44M annually.

Project logistics would require a managed effort and a multi-year coordination of temporary facilities, off-site staff parking, and a flurry of construction activities, all while continuing to provide essential services to the residents of Orange County.

**Option #1A – Build new facilities on site and sell a portion of the property for other uses:**

The District could also reallocate the existing site to house not only the District operations center, but also a commercial opportunity such as a hotel or auto dealership. In this scenario, the proceeds of the sale or lease of the ancillary property would likely be adequate to reach the top end of the estimated project cost of approximately \$45M. This option, however, does limit the District's ability to fully utilize the entire 5.19-acre site. Additional evaluations would need to take place if this is the direction of the Board.

**Option #2 - Relocate to an existing building not on the current site and improve to meet the needs of the District:**

Due to the uniqueness of the services the District provides to the residents of Orange County, it is desirable that the District's base of operations remain within the north-central portion of Orange County. Ideally, any future location should have easy freeway access, be between or adjacent to Interstate 5 and Interstate 405 and be proximate to major arterial roads.

According to city staff, the existing property zoning is not at its best and highest use, and the site is desirable for uses other than its current use. Its adjacency to freeway frontage and two major arterials increases the property's value beyond other similar properties.

The 5.19-acre site is valued at approximately \$13M. This value is based upon an October 2019 unsolicited offer to purchase submitted through CBRE Inc. The District has also received other unsolicited offers to purchase in the past two years, each in the \$13M - \$14M range. The Kosmont study indicates that the value is between \$10.9M and \$15.5M.

As noted previously, the city has encouraged the District to seek approvals for a change to the current land use. This designation would allow a potential property owner (including the District) to site 2 hotels on the property. The zone change, according to the city, could possibly have the financial effect of increasing the value of the property three times its current value. However, using a conservative approach, and based upon the recent CBRE offer, staff recommends that the land value be recognized as \$15M.

According to commercial real estate experts, industrial properties within Orange County that would meet the requirements of the District are plentiful. However, only a few are currently on the market and being offered for sale.

As noted, proceeds from a potential sale of the existing site could generate approximately \$15M. Combined with existing facility reserves of \$8M, an estimated \$23M would potentially be available for use for the purchase and renovation of an existing facility. Under this scenario, there is little to no debt needed to proceed with this option (there could possibly be bridge financing that is necessary to purchase a site prior to the sale of the existing site). However, and based on the fact that the District allocates \$500,000 annually to the District's facility fund for future facilities, that contribution could potentially be used for annual debt service without interrupting District operations. Under that scenario, an additional approximate \$10M could be generated, raising the potential project ceiling to \$33M.

**Summary:**

Staff has spent considerable effort on this project, worked with the Joint Committee, engaged the services of qualified outside consultants, and sought out the input of the city of Garden Grove. Based upon those findings, staff recommends that the Board of Trustees proceed with Option #2 - *Relocate to an existing building not on the current site and improve to meet the needs of the District*; and direct staff to return to the January Board meeting with the general scope of work to facilitate the following tasks:

1. Initiate the process to change the property zoning to allow for commercial/hospitality uses on the site through a Planned Unit Development process, which will take approximately 9-12 months to complete. The city has indicated that they would be supportive of this process. The estimated cost to the District to accomplish this is approximately \$80K-\$100K.
2. That the District initiate a property search to determine feasible locations for future district operational facilities in Orange County.
3. That the District proceed to develop a transition calendar and associated tasks.

**Joint Committee Recommendation:**

The Joint Committee met on December 5, 2019 and received a thorough report analyzing the options presented. At that meeting, the Joint Committee unanimously voted to:

1. Relocate to an existing building not on the current site and improve to meet the needs of the District.
2. Identify potential hotel operators and initiate the process to change the property zoning to allow for commercial/hospitality uses on the site through a Planned Unit Development process.
3. That the District initiate a property search to determine feasible locations for future district operational facilities in Orange County.
4. That the District proceed to develop a transition calendar and associated tasks.

If authorized to proceed, staff will coordinate with the Joint Committee and the Board of Trustees throughout the process.

**Fiscal Impact:**

**Amount Requested \$ N/A**

**Sufficient Budgeted Funds Available:**

**Category: Pers. Optg. Cap. -or- CIP# Fund#**

**Previous Relevant Board Actions for This Item**

**Exhibits**

- Exhibit A; LPA Space Plan Analysis
- Exhibit B; LPA Existing Site Plan Analysis
- Exhibit C; The Kosmont Company Asset Strategy Report



# ORANGE COUNTY MOSQUITO AND VECTOR CONTROL DISTRICT

March 18, 2021

## AGENDA REPORT

### AGENDA ITEM: G.3

**Prepared By:** Tawnia Pett, Executive Assistant/Clerk of the Board  
**Submitted By:** Rick Howard, District Manager

### Agenda Title:

Receive Statement of Economic Interests 700 Forms for Filing

### Recommended Action:

Receive and file.

### Executive Summary:

Each trustee is required to complete a Statement of Economic Interests Form 700 by April 1, 2021. (Please note there are penalties for late filing). The cover page of the form 700 must have an original signature in blue ink. Trustees may obtain the form and additional information online at <http://www.fppc.ca.gov/Form700.html> or file electronically as indicated below.

Electronic Filing: All trustees should have received information from the Clerk of the Board of Supervisors regarding filer instructions for electronically filing their Statement of Economic Interests Form 700, including log-ins, IDs, and passwords. The link to this site is <https://www.southtechhosting.com/OrangeCounty/eDisclosure/>

Please contact Tawnia Pett if you have not received this information. Electronic filing is not mandatory.

**Trustee Filing Disclosure is Category OC-1: All interests in real property in Orange County, as applicable, as well as investments, business positions, and sources of income (including gifts, loans, and travel payments) "Your Position" should be filed as "Board Trustee".**

### Fiscal Impact:

Amount Requested \$ N/A

Sufficient Budgeted Funds Available:

Category: Pers. Optg. Cap. -or- CIP# Fund#

### Previous Relevant Board Actions for This Item:

### Exhibits:

## *Vector of the Month*

### **Red Imported Fire Ants (RIFA)**

Red Imported Fire Ants (RIFA), *Solenopsis invicta*, are very aggressive, invasive ants. They are called “imported” because they are not native to this country. It is believed that they came to the United States from South America aboard cargo ships that docked in Mobile, Alabama, during the 1930s. RIFA vigorously defend their nests, attack in large numbers, and sting repeatedly. They also attack agricultural workers, compete with beneficial insects, and devour important crops.

Red imported fire ants attack by biting their victims with powerful jaws while stinging repeatedly, injecting venom that causes pustules and itching for up to two weeks. RIFA stings are serious and can be fatal for the very young, the elderly, and anyone allergic to the venom. RIFA are attracted to pet food left outdoors and will sting pets when disturbed. These attacks can be serious for pets since the first part of the animal to get stung is usually the sensitive muzzle. If there are enough stings in the right place, the swelling caused by the venom can obstruct breathing. The toll taken on wildlife can also be considerable. The numbers and variety of reptiles and amphibians remaining in areas infested by RIFA is a fraction of what was there before. Any ground or low nesting birds will be impacted as well. The need for moisture will limit land infestation of RIFA to wetlands. One half of threatened animal species are somewhat dependent on wetlands.

In southern California, RIFA colonies rarely build the large mounds typical of RIFA in other parts of the country. Almost all mounds



in Orange County are found in irrigated areas, most often on turf which gets mowed every week. Look for patches of fine granular soil where it doesn't belong, for example, in the middle of a lawn. It is possible that if a colony has settled into an irrigated planter or other landscaped area, a mound will develop, usually at the base of a shrub. Another common location is adjacent to a hardscape feature like a large rock or a concrete walkway. These large, dense objects are attractive to RIFA because they store heat during the day and release it slowly during the night. The constant temperature provided by the release heat allows colonies to reproduce and gather food twenty-four hours a day.

Since RIFA represent such a serious threat, homeowners may be tempted to treat on their own. Unlike other vector issues, the Orange County Mosquito and Vector Control District (OCMVCD) discourages the public from trying to control RIFA on their property. RIFA are considered an exotic pest, and as such, must be tracked; every known site should be reported. The procedure for killing ant colonies is far different from killing individual ants. OCMVCD Inspectors typically use an insect growth regulator (IGR), a product that stops ant larvae from maturing into adults. This results in a decrease in replacement ants and as the workers die off, so does the colony. If you find a RIFA colony, please contact OCMVCD to report it so appropriate control measures can be implemented.

## Understanding a Fire Ant Colony

By Mark Justin Wolfe

<https://www.amdro.com/learn/fire-ants/understanding-a-fire-ant-colony>



Red imported fire ants are miserable landscape nuisances. Their repeated bites cause nasty welts, and their mounds can wreck a beautiful lawn in no time. Keeping these pests under control is a matter of safety, comfort and household aesthetics. In order to meet this challenge effectively, it is important to understand the lifestyle habits of fire ant colonies:

### FIRE ANT HABITAT

Imported fire ants were accidentally introduced into the United States in the 1930s. Because they require moisture, as well as a food source to survive, these opportunistic insects are typically found in the humid Southeastern United States. However, they've spread north and west, stopping where there is severe cold or lack of water. Native fire ants prefer the arid southwestern United States and northern Mexico, where imported fire ants are rare.

### FIRE ANT MOUNDS

Fire ants are social insects that build nests, called mounds, by pushing up soil as they tunnel in the earth. They nest in almost any type of soil, but prefer open, sunny areas, such as meadows, pastures, parks, playgrounds, lawns and golf courses, as well as agricultural land and wilderness areas.<sup>1</sup>

Unlike other kinds of ants, fire ants have no nest entry on the mound itself. They enter the nest via tunnels that may reach several feet or more beyond the mound itself. Though it is the most recognizable sign of the presence of fire ants, a mound is not necessary for the survival of a fire ant colony. During especially hot or dry weather, colonies tend to move deeper into the ground, foregoing the palatial mounds that are so obvious in moderate weather. New colonies may not build a visible mound for months or longer, depending on soil and weather conditions.

### FIRE ANT LIFECYCLE

Queen fire ants lay eggs, which hatch into grub-like larvae. After undergoing four developmental stages, larvae then molt into pupae, which although whitish in color and not fully mobile,

resemble adult fire ants. The pupae darken in color as they develop, and then molt a final time into adults.

Most larvae develop into small, wingless female workers. Those workers rear the young and scavenge for food for the queen. Some larvae develop into larger winged males or female reproductive adults. Female reproductives are future queens for new colonies. Spring through fall, when conditions are favorable, reproductives break through the mound to mate in mid-air. They spend a few minutes drying their wings as they sit atop the broken mound, then take flight to copulate fifteen feet or more above ground. Afterward, the males die and the new queens lose their wings before digging into the ground to begin building nests and laying eggs. New workers emerge within a month.

### **FIRE ANT FEEDING**

In morning and evening, workers scavenge for food. Fire ant food preferences include plants, microscopic organisms, invertebrates and vertebrates such as reptiles, birds and mammals.<sup>2</sup> Scavenging workers carry the bounty back to the nest for distribution among the entire colony: queen, larvae, developing reproductives and other workers.

### **FIRE ANT COLONIES**

Imported fire ant colonies can have a single queen or multiple queens. Single-queen colonies are territorial in nature, limiting populations to approximately 150 mounds containing 7 million ants per acre. Multiple-queen colonies tend to share resources and are tolerant of other colonies in close proximity. These characteristics may allow for up to 300 mounds and 40 million ants per acre.

Colonies frequently migrate from one site to another. The queen needs only half a dozen workers to start a new colony. Workers can develop a new mound several hundred feet away from their previous location almost overnight.<sup>3</sup>

### **FIRE ANT CONTROL**

The use of baits are the most effective method of fire ant control. Unlike contact insecticides, which are not selective and do not penetrate mounds easily, bait uses the biology and structure of the colony as the means of dispersal. Scavenging workers carry bait to the larvae, and the larvae quickly disperse the active ingredient to the queen(s) and the other workers. To destroy the mound, the queen(s) must be killed.

Fire ants are an irritating part of life for many homeowners. Although these insects are stubborn, opportunistic and abundant, following a consistent schedule of bait applications will minimize their threat.

*Amdro is a registered trademark of Central Garden & Pet Company.*

#### **Sources:**

1. "[Fire Ant Habitat and Food Sources](#)," Extension.org, May 2014
2. "[What do Fire Ants Eat?](#)" Extension.org, March 2015
3. [Texas Imported Fire Ant Research and Management Project](#), Texas A&M Extension





## Orange County Mosquito and Vector Control District

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*A Public Health Agency Serving Orange County Since 1947*

### Conference and Meeting Report

*Staff of the Orange County Mosquito and Vector Control District and its Board of Directors attend a variety of educational seminars, conferences and symposia annually. This report provides a brief summary of the event attended, and the organizational value of that attendance to the District.*

**Staff Name and Title:** Hester “Fritz” Petropoulos, Education Coordinator

**Name of Conference/Event:** MVCAC 2021

**Date:** February 1-3, 2021

**Location:** Virtual

The community engagement forum at MVCAC shared many programs that vector control districts have developed this past year, many in response to the changing ways in which we engage with community members about vector control during a global pandemic.

A common theme was how to respond to the increasing need for *Aedes* inspections when staffing remains static. More than one District shared their advocate kits so that residents could be taught how to perform their own home mosquito inspection and then be equipped to teach their neighbors the information. I really like San Gabriel Valley Vector Control District’s Levy Sun’s comment “Content is king but distribution of the content creates the kingdom.” This was simple but profound. Having amazing messaging, programs, and materials are only part of the effort. Getting the information out and distributed is also vital. The advocate kits (our District started this program this past year as well) have some similarities—including mosquito and disease information, tips and tricks, checklists, and samples of mosquito wipes. There were some differences as well. Greater Los Angeles had people take a pledge, and Sacramento-Yolo included outreach “swag” in their kits. But the common theme of residents taking responsibility rang true.

School education also changed. Greater Los Angeles took a different angle on educating students and made videos answering student questions that they submitted to their District. Another district took their existing assembly and recorded it. Video creation seemed to be a common solution to adapting school programs.

The program on tick surveillance at schools was fascinating, partly because of the public relations nightmare that they had to tackle after misinformation was shared to the news media about students being bitten by ticks on sports fields (ticks typically do not reside in mowed grassy areas). I admired how San Mateo took a challenging situation as an opportunity to improve. They created a school tick surveillance program by targeting at-risk schools for tick

abundance by looking at maps and visiting schools. Technicians performed surveillance during winter break, which happens to overlap with prime tick season. They found 226 ticks from 10/15 schools. None tested positive for pathogens. San Mateo Vector Control then created personalized report for the schools and 5 schools took immediate action to remedy potential tick harborage areas. School officials and parents received education and information. Their approach seems like a good model if our District ever want to expand their tick surveillance to school sites.

Date: March 8,2021

Signed: Hester Petropoulos

Dept Mgr Signature: Lora Young

Print Name: Hester Petropoulos

**VECTOR CONTROL JOINT POWERS AGENCY**  
**33<sup>rd</sup> ANNUAL WORKSHOP AGENDA**  
**Thursday, February 25, 2021**  
**8:30 a.m.**

This meeting will be held using the Zoom platform.

To join the meeting, please follow the instructions below:

- Click on the following link: (For best results, use Google Chrome as your browser.)
- <https://us02web.zoom.us/j/81389149911?pwd=c0lTN1Rma0FmZkZkb1VYM2lNc0FtQT09>
- Click on **“Join by browser” or by the Zoom Application**
- Click on **“Join meeting”**
- Select Either Computer Audio or Call In Using the Number Provided On Your Screen
- Enter the **Access code and Attendee ID** when prompted

Audio Only: If you do not have internet access, you may join by phone by using the following information:

- +1 (669) 900-6833 (Toll)
- Access code: 813 8914 9911
- Passcode: 156432

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In compliance with the Americans with Disabilities Act, if you are a disabled person and you need a disability-related modification or accommodation to participate in this meeting, please contact Ms. Katie Achterberg at (916) 290-4624 or (916) 244-1199 (fax). Requests must be made as early as possible and preferably at least one full business day before the start of the meeting.

Documents and materials relating to an open session agenda item that are provided to the VCJPA members less than 72 hours prior to a regular meeting will be available for public inspection. Please contact Katie Achterberg at (916) 290-4624 or [katie.achterberg@sedgwick.com](mailto:katie.achterberg@sedgwick.com).

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**Thursday, February 25, 2021**

<u>Estimated Time</u>	<u>Page</u>	
8:30 AM		<b>1. INTRODUCTIONS AND REVIEW</b>
	3	A. Welcome and Opening Remarks by President Andy Cox
		1. Review Mission Statement
		<b>2. COVID-19 DISCUSSION</b>
8:45 AM		*A. Assembly Bill 685 – Cal/OSHA Regulations
	4	*B. Senate Bill 1159 – Workers’ Compensation Regulations
	12	
9:45 AM		<b>5 Minute Break</b>
9:50 AM		<b>3. FINANCIAL OVERVIEW</b>
	15	*A. Financial Position Overview

\*Reference materials attached with staff report

- |          |  |
|----------|--|
| 10:05 AM | <b>4. POOLED WORKERS' COMPENSATION PROGRAM</b>   |
| 30       | *A. General Overview of Program Structure, Review of Financial Position, and Claims Overview                         |
| 57       | *B. Review by Acclamation Insurance Management Services (AIMS) of Medical Provider Network and Nurse Triage Programs |
| 10:55 AM | <b>5 Minute Break</b>  |
| 11:00 AM | <b>5. LIABILITY PROGRAM</b>  |
| 69       | *A. General Overview of Program Structure, Review of Financial Position, and Claims Overview                         |
| 12:00 PM | <b>6. ADJOURNMENT</b>  |

**NOTICES:**

1. An optional afternoon training session, "Resolving Conflict in the Workplace," will begin at 1:30 p.m. see calendar invite or training session agenda for link to participate.
2. The VCJPA Annual Workshop will resume Friday, February 26, 2021, at 8:30 a.m.
3. A Board of Directors Meeting will be held Friday, February 26, 2021 following conclusion of the annual workshop (estimated start time: 11:00 a.m.).

Agenda Item 1.A. and 1.A.1.

**INTRODUCTIONS AND REVIEW**

**SUBJECT: Welcome and Opening Remarks by President Andy Cox and Review Mission Statement**

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**BACKGROUND AND STATUS:**

This time is reserved for opening remarks by Andy Cox, VCJPA Board of Directors President, and a review of the VCJPA Mission Statement by staff.

**REFERENCE MATERIALS ATTACHED:**

None

**Agenda Item 2.A.**

**COVID-19 DISCUSSION**

**SUBJECT: Assembly Bill 685 – Cal/OSHA Regulations**

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**BACKGROUND AND STATUS:**

On September 17, 2020, Governor Newsom signed Assembly Bill (AB) 685 into law. This law adds COVID-19 employer notification requirements for worksite exposures and outbreaks. It also enhances Cal/OSHA's enforcement of COVID-19 infection prevention requirements. Cal/OSHA has published an [AB 685 information page](#) to help employers understand and implement the requirements. Staff also recommend employers review the complete legislation at [AB 685](#). Please note the changes will be in effect from January 1, 2021, until January 1, 2023.

A brief overview of the requirements includes:

**Employer Reporting Requirements:**

- Employers will be required to notify employees after becoming aware a person with a confirmed COVID-19 case has been on the employer's worksite. The written notice will be sent to employees who were on the same premises/worksite as the person with the confirmed case. The written notice must be sent immediately *within one business day*. The Cal/OSHA information page and the legislation link provide details on what the notice must include and who should receive the notice.
- Employers will also be required to notify their local public health agency of all workplace outbreaks. A workplace outbreak is defined as three or more laboratory-confirmed cases of COVID-19 among employees within a two-week period who have worked at the worksite and who live in different households. Employers are required to notify the agency *within 48 hours* of becoming aware of the number of cases that meets the definition of a workplace outbreak. Here is a [directory of the California public health agencies](#) to assist with the outbreak reporting requirements.

**Enhanced Cal/OSHA Enforcement:**

- This law will allow Cal/OSHA to issue an Order Prohibiting Use (OPU) to shut down an entire worksite or a specific worksite area that exposes employees to an imminent hazard related to COVID-19.
- This law will also allow Cal/OSHA to issue citations for serious violations related to COVID-19 without giving employers 15-day notice before issuance.

Staff will review AB 685 with the members, discuss the model templates that have been provided to the districts, and answer questions.

**REFERENCE MATERIALS ATTACHED:**

- AB 685 Model Written Notification Templates

# Assembly Bill 685

## COVID-19 Written Notification Templates

### **Background**

On September 17, 2020, [AB 685](#) was signed into law effective January 1, 2021, through January 1, 2023. The law outlines COVID-19 employer written notification requirements for worksite exposures. Employers will be required to notify potentially exposed employees, the exclusive representative if applicable, and the employers of subcontracted employees after becoming aware that a person with a confirmed COVID-19 case has been on the employer's worksite. The written notice is required to be sent to those who were on the same premises/worksite as the person with the confirmed case. The employee notification must maintain the person with the confirmed case's confidentiality. The written notice must be sent within one business day from employer awareness.

The notice can be sent through email, text, or other mediums as long as it can be reasonably anticipated to be received within one business day of sending and must be in both English and the language understood by the majority of the employees. The employer must retain records of the written notification for three years; this would include potentially exposed employees, exclusive representatives, and employers of subcontracted employees.

### **Instructions**

Sedgwick Risk Control has developed three sample letter templates to assist employers with the notification requirements. Prior to customizing the templates, we recommend a thorough review of AB 685 and the newly adopted Cal/OSHA [COVID-19 Prevention Emergency Regulation](#) which is effective on November 30, 2020.

There are several areas in the templates that need to be reviewed and customized based on the employer's specific policies. These sections are indicated by **BLUE TEXT**, and guidance is indicated by **SHADED TEXT**. You should remove the shaded areas and change the blue text to black for the final document. We recommend retaining these instructions and copy/pasting the template language onto your entity's letterhead for distribution.

The following guidance will assist employers with customizing the templates:

#### **Template #1 – Notice to Employees**

The employer will need to determine who was on the same premises/worksite as the person with the confirmed case. The written notice to potentially exposed employees must include the following information:

##### **1. Notice of Potential Exposure to COVID-19**

The notice must be sent to the identified employees who may have been exposed to COVID-19. The template provides sample language on COVID-19 testing requirements that need to be

modified based on the employer's policies. It also includes language on the infectious period and when potentially exposed employees can return back to work. The employer will be required to determine the infectious period and enter this information in the notification.

For the purposes of this notification, the infectious period typically starts 2 days before the confirmed person's symptoms or positive test date and ends 14 days later. Conditions such as extended fever/symptoms and other potential scenarios vary case by case, so we recommend reviewing the California Department of Public Health's definition at [CDPH AB 685 Questions](#) to calculate the notification's beginning and ending date of the infectious period.

## **2. COVID-19-related Benefits & Options**

This section addresses remote work options and COVID-19-related benefits and options to which the employee may be entitled under applicable federal, state, or local laws, including, but not limited to, workers' compensation and other options for exposed employees, such as COVID-19-related leave, company sick leave, state-mandated leave, supplemental sick leave, or negotiated leave provisions.

The California Labor & Workforce Development Agency has created a list of [Benefits for Workers Impacted by COVID-19](#) as a reference for employers.

## **3. Retaliation and Discrimination Protections**

Employers are required to outline their retaliation and discrimination protection policies in the notification as it relates to reporting a positive COVID-19 test or order to quarantine or isolate. Review this section and modify based on the employer's policies.

## **4. Disinfection and Safety Plan**

The employer is required to outline its disinfection and safety plan. If the employer already has procedures in place, they can be written into the notification or the procedures can be attached to the notification.

The Cal/OSHA [COVID-19 Prevention Emergency Regulation](#) requires employers to develop a COVID-19 Prevention Program. The program includes disinfection and safety plan procedures. The Cal/OSHA model program is available at [CalOSHA Model COVID-19 Prevention Program](#).



**Template #2 – Notice to Employers of Subcontracted Employees (if applicable):**

The sample template is addressed to the employer of subcontracted employees and includes information about sections 1 and 4 of the employee notification as required.

**Template #3: - Notice to the Exclusive Representative (if applicable):**

The written notice to the exclusive (labor) representative must include all the information provided to employees. We recommend attaching the employee notification to the exclusive representative's notification. The employer is also required to provide a list of the notified employees who are represented. The notified employee's information should include what would be required on the Cal/OSHA 300 log unless the information is inapplicable or unknown to the employer. For additional details refer to the labor code section 6509.6 subsection (a) and (c) in [AB 685](#).

## Template 1: Employee Notification of Possible Exposure to COVID-19

Date: [Date notice is sent to employees](#)

To: All potentially affected employees

### Possible Exposure to Covid-19

We are writing to inform you that you may have been exposed to COVID-19 during the course of your work. A person who has either tested positive or otherwise been diagnosed with COVID-19 or a person who is subject to a public health isolation order resulting from COVID-19 or a person who has since died of COVID-19 was on the [Name of Entity's](#) premises during the infectious time period of [enter the start/end dates of the 14-day infectious period](#) [REFER TO INSTRUCTIONS FOR GUIDANCE]. At some point during this period, you may have come into contact with this person. As a result, you may have been exposed to COVID-19.

Due to your potential exposure to COVID-19, we require you be tested immediately. [Insert specific direction and the person to contact](#). You must not return to work until you have a confirmed negative test result, or in the absence of a confirmed negative test, you complete the requisite quarantine of **14 days** from the last possible day of exposure, which was [insert last date the subject individual was at the worksite](#).

If you have a confirmed positive test, you must not report to work in person until you are cleared by your medical provider or a public health official. If you have a confirmed positive test, are otherwise diagnosed with COVID-19, or become subject to a public health isolation order unrelated to your employment, you are not required to report this medical information to us as your employer, although we would appreciate that you do as a means of helping keep our staff and community safe.

### COVID-19-related Benefits & Options

During your absence, you may be able to work remotely with your [supervisor's/insert name's](#) approval. If you are not approved to work remotely, you may use any accrued leave or any federal, state, or local benefits that you may be eligible for. Additionally, you may be entitled to other COVID-19-related benefits under applicable federal, state, or local laws, including, workers' compensation and other options for exposed employees, including COVID-19-related leave under the federal Families First Coronavirus Response Act and state AB 1867, District sick leave, state-mandated leave, and supplemental sick leave. See [insert appropriate contact](#) for more information about employee benefits. [YOU CAN ALSO INSERT LOCATION OF ANY RELEVANT LEAVE POLICIES.]

### Retaliation & Discrimination Protections

Our policies and state law protect you from retaliation or discrimination for reporting a positive COVID-19 test or order to quarantine or isolate. If in the future, you believe you are subjected to any retaliation or discrimination for your protected conduct, please inform [insert appropriate](#)

[contact](#). Workers who believe they have wrongfully experienced retaliation or discrimination may also file a complaint with the [Division of Labor Standards Enforcement](#).

### **Disinfection & Safety Plan**

We endeavor to maintain a safe and healthy workplace for all. As a result of this possible exposure, we are implementing the following disinfection and safety plan, pursuant to guidelines from the Centers for Disease Control. [YOU CAN INSERT YOUR PLAN HERE OR REFER THE READER TO ANOTHER DOCUMENT, SUCH AS THE COVID-19 PREVENTION PROGRAM.]

If you have any questions about this notification or if you wish to discuss your eligibility for certain COVID-19 benefits, please do not hesitate to contact [insert appropriate contact](#).

## Template 2: Notice to Employers of Subcontracted Employees (if applicable)

Date: [Date notice is sent](#)

To: [Name of employer of subcontracted employees](#)

We are writing to inform you that your employees may have been exposed to COVID-19 during the course of their work at our workplace. A person who has either tested positive or otherwise been diagnosed with COVID-19 or a person who is subject to a public health isolation order resulting from COVID-19 or a person who has since died of COVID-19 was on the [Name of Entity](#)'s premises during the infectious time period of [enter the start/end dates of the 14-day infectious period](#) [REFER TO INSTRUCTIONS FOR GUIDANCE], and at some point during this period, your employees may have come into contact with this person. As a result, they may have been exposed to COVID-19. Your potentially exposed employees include [list name\(s\) of employees](#).

Due to their potential exposure to COVID-19, we recommend they are tested immediately. They must not report to our workplace in person until they have a confirmed negative test result, or in the absence of a confirmed negative test, they complete the requisite quarantine of **14 days** from the last possible day of exposure, which was [insert last date the subject individual was at the worksite](#). If the subcontracted employees have a confirmed positive test, they must not report to our workplace in person until they are cleared by your medical provider or a public health official.

If remote working options are available, you will be contacted by [insert appropriate contact](#).

We endeavor to maintain a safe and healthy workplace for all. As a result of this possible exposure, we are implementing the following disinfection and safety plan, pursuant to guidelines from the Centers for Disease Control. [INSERT THE INFORMATION YOU DEVELOPED IN TEMPLATE #1]

If you have any questions about this notification, please do not hesitate to contact [insert appropriate contact](#).

### Template 3: Notice to the Exclusive Representative

Date: [Date notice is sent](#)

To: [Name of exclusive representative](#)

We are writing to inform you that some of our employees may have been exposed to COVID-19 during the course of their work. A person who has either tested positive or otherwise been diagnosed with COVID-19 or a person who is subject to a public health isolation order resulting from COVID-19 or a person who has since died of COVID-19 was on the [Name of Entity's](#) premises during the time period of [enter the 14-day infectious period stating the beginning and ending dates](#), and at some point during this period, employee(s) may have come into contact with this person. As a result, they may have been exposed to COVID-19.

The notification includes exposure information, testing and quarantine requirements, related benefit options, retaliation and discrimination protections, and our disinfection and safety plan protocols. [Attached is a copy of the notification to employees.](#)

In addition, we are attaching a list of the employee(s) who received the notification of potential exposure.

If you have any questions about this notification, please contact [insert appropriate contact](#).

Agenda Item 2.B.

**COVID-19 DISCUSSION**

**SUBJECT: Senate Bill 1159 – Workers’ Compensation Regulations**

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**BACKGROUND AND STATUS:**

On September 17, 2020, Governor Newsom approved [Senate Bill \(SB\) 1159](#), which established certain COVID-19 illnesses/injuries as presumptively compensable for workers’ compensation benefits. SB 1159 included an “urgency” clause in which the bill requirements went into effect immediately. While benefits for all workers who suffer industrial injury/illness will be administered in a timely and appropriate manner by VCJPA’s third-party administrator (TPA), AIMS, SB 1159 requires increased cooperation and information gathering by each employer. We recommend employers review the complete legislation at [AB 1159](#).

SB 1159 also states TPAs will be responsible for tracking the reported information from each employer and determining whether it meets the “outbreak” requirements outlined in the legislation. SB 1159 states the presumption is triggered if an employee tests positive for COVID-19 during a period of an outbreak at the employee’s worksite. AIMS previously provided the member districts a form to report positive COVID-19 findings per the new requirement.

To ensure members are compliant with SB 1159, staff will review the guidelines with the members and answer questions.

**REFERENCE MATERIALS ATTACHED:**

- AIMS - COVID-19 Positive Test Report



# COVID-19 Positive Test Report

Please complete one report for each positive COVID-19 test. Submit by email to **COVIDREPORTING@Aims4Claims.com** or by fax to **(916) 563-1919**.

*Note: This report does not generate a claim, nor does a claim qualify as a report. To submit a claim, please follow your internal reporting procedures.*

## Overview

If you are aware of an employee testing positive for COVID-19 on or after July 6, 2020, you must report it to your claims administrator (California Labor Code Section 3212.88).

- Positive COVID-19 test results on or from July 6, 2020 through September 17, 2020 must be reported to your claims administrator by October 29, 2020.
- Positive COVID-19 test results after September 17, 2020 require reporting within 3 business days of knowledge (or when it should reasonably have been known).

## Employer information

Employer Name: \_\_\_\_\_

Number of employees: \_\_\_\_\_ Primary contact: \_\_\_\_\_

Contact phone: \_\_\_\_\_ Contact Email: \_\_\_\_\_

Fax: \_\_\_\_\_ Today's date: \_\_\_\_\_

## COVID-19 test result information

**Tracking Number:** \_\_\_\_\_

This is an internal number you assign to track what has been reported. Do not include any Personal Identifiable Information (such as SSN, DOB, etc.) in this report.

**Reported as Industrial:**  Yes  No

**Date of positive COVID-19 test:** \_\_\_\_\_

This is the sample collection date. Test must be a Polymerase Chain Reaction (PCR) or other viral testing approved by the FDA. Serologic (antibody) testing is not a viable test.

**Date employer notified of positive COVID-19 test result:** \_\_\_\_\_

**Date employee last worked before positive COVID-19 test result:** \_\_\_\_\_

## Employee work location

List **all** locations where employee worked at your direction during the 14-day period prior to the positive test result.

**Location:** Street address including suite and/or building number, city, state and zip code of work location.

**Highest #:** Highest daily number of employees at each location.

- If the positive test occurred on or after September 17, 2020, enter highest daily number of employees in the 45 days prior to last day the employee worked.
- If the positive test occurred between July 6, 2020 and September 16, 2020, enter highest daily number of employees during that timespan.

**Ordered Closure:** If a location was ordered to close by a local public health department, the State Department of Public Health, the Division of Occupational Safety and Health, or a school superintendent due to risk of infection with COVID- 19, who ordered the closure, and when.

Location	Highest #	Ordered Closure
		<input type="checkbox"/> No <input type="checkbox"/> Yes. Date of order: _____ Ordered by: _____
		<input type="checkbox"/> No <input type="checkbox"/> Yes. Date of order: _____ Ordered by: _____
		<input type="checkbox"/> No <input type="checkbox"/> Yes. Date of order: _____ Ordered by: _____
		<input type="checkbox"/> No <input type="checkbox"/> Yes. Date of order: _____ Ordered by: _____
		<input type="checkbox"/> No <input type="checkbox"/> Yes. Date of order: _____ Ordered by: _____
		<input type="checkbox"/> No <input type="checkbox"/> Yes. Date of order: _____ Ordered by: _____
		<input type="checkbox"/> No <input type="checkbox"/> Yes. Date of order: _____ Ordered by: _____

Name (Print): \_\_\_\_\_ Date: \_\_\_\_\_

## Submit your report

Email your completed report to [COVIDREPORTING@Aims4Claims.com](mailto:COVIDREPORTING@Aims4Claims.com) or fax it to (916) 563-1919.



Agenda Item 3.A.

**FINANCIAL OVERVIEW**

**SUBJECT: Financial Position Overview**

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**BACKGROUND AND STATUS:**

This time is reserved for Jim Elledge, Interim Finance Manager, to provide a financial overview of the VCJPA.

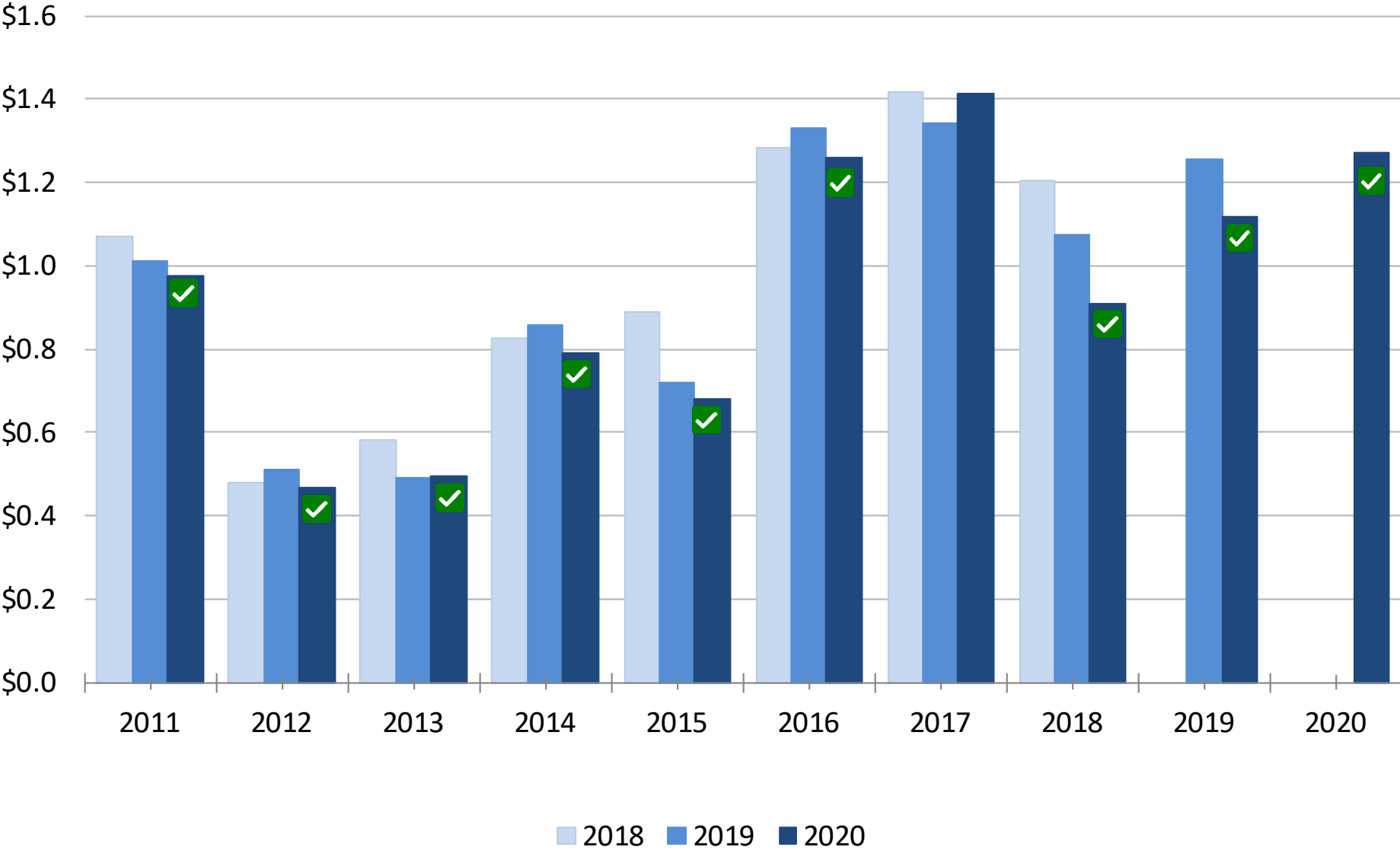
**REFERENCE MATERIALS ATTACHED:**

- Financial Status Charts and Graphs:
  - Financial Highlights
  - Estimated Ultimate Loss
  - Investment Returns
  - Net Position by Fiscal Year
  - Net Position by Program
  - Cash and Investments
  - Combined Statements of Net Position
  - Combined Statements of Change in Net Position
  - Conclusions
- Contingency Fund Balances at December 31, 2020
- Member Contingency Fund – Sample Prudent Balance Calculation
- Member Contingency Fund and Prudent Balance Calculation as of December 31, 2020

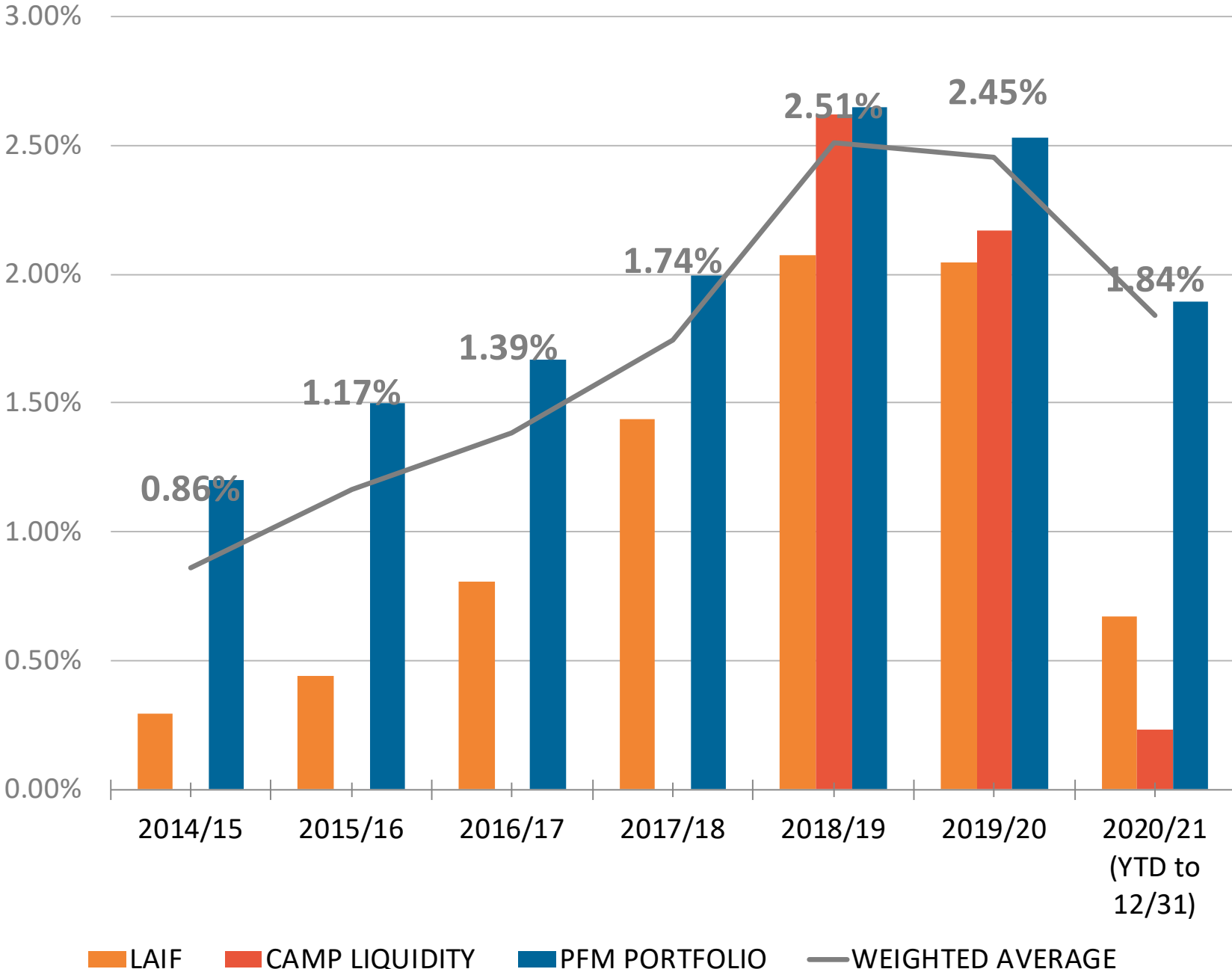
# Financial Highlights

- Funding for both programs set at the 85% confidence level.
- Rates discounted to net present value at 1% as interest rate conditions continue to decline.
- Loss experience has been favorable in recent program years.
- Mid-Layer funding has resulted in net position growth.
- Loss fund contribution rates are stable in both programs.
- Excess and reinsurance rates seeing more significant increases.
- Overall net position and liquidity remains strong.

# Estimated Ultimate Loss Current vs. Prior Estimates



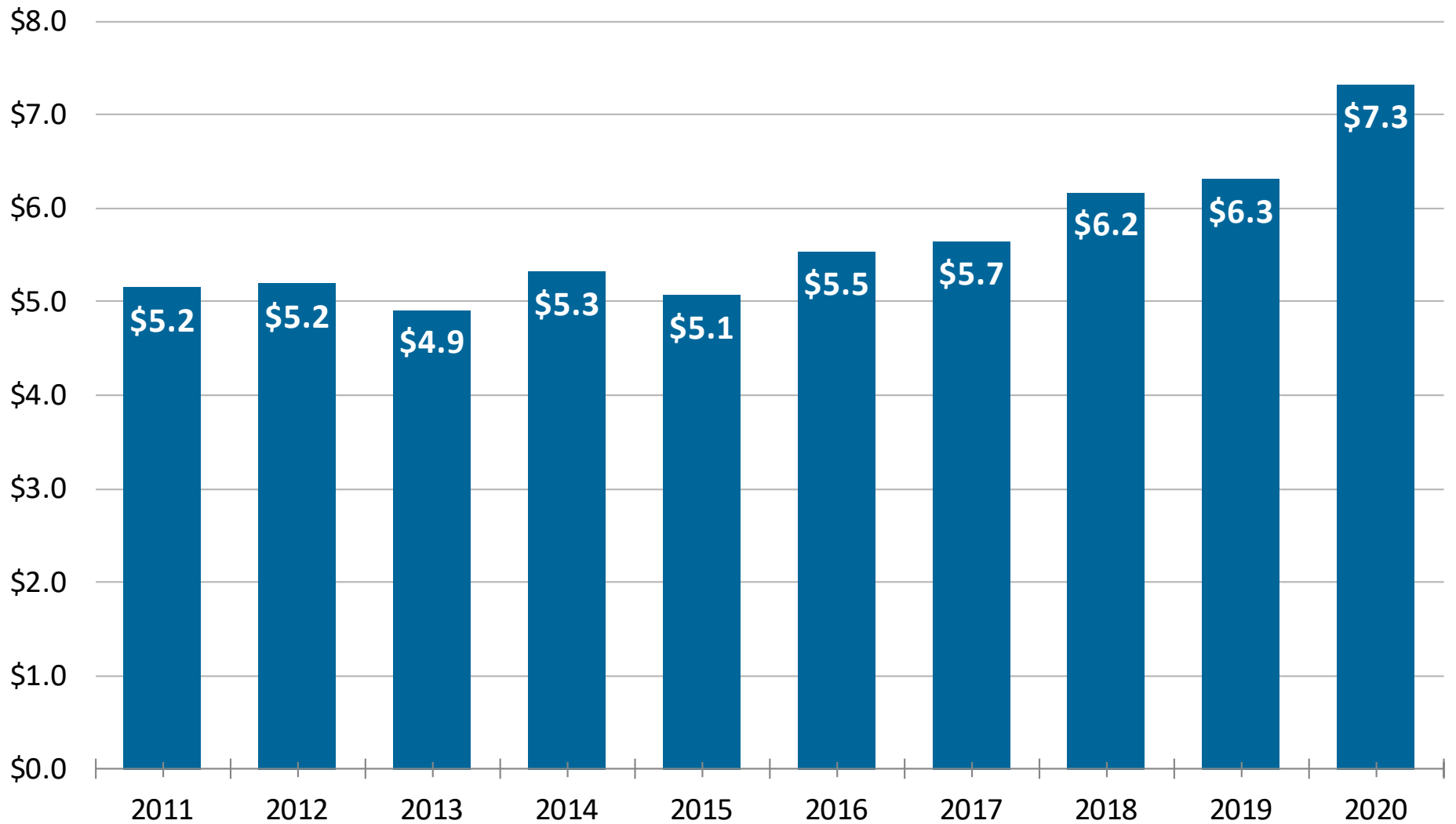
# Investment Returns



FINANCIAL OVERVIEW

# Net Position by Fiscal Year

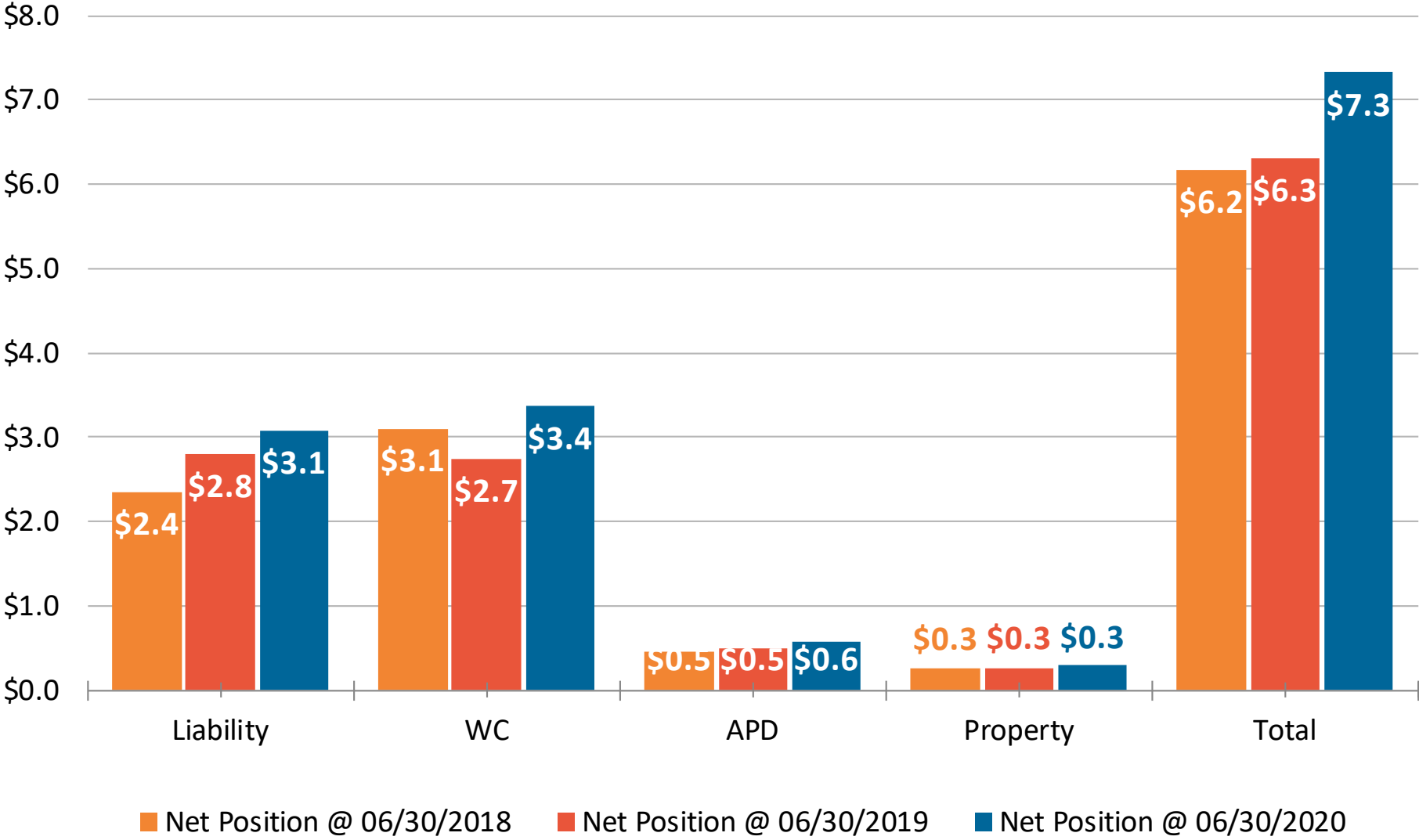
## All Programs, In Millions



FINANCIAL OVERVIEW

# Net Position by Program

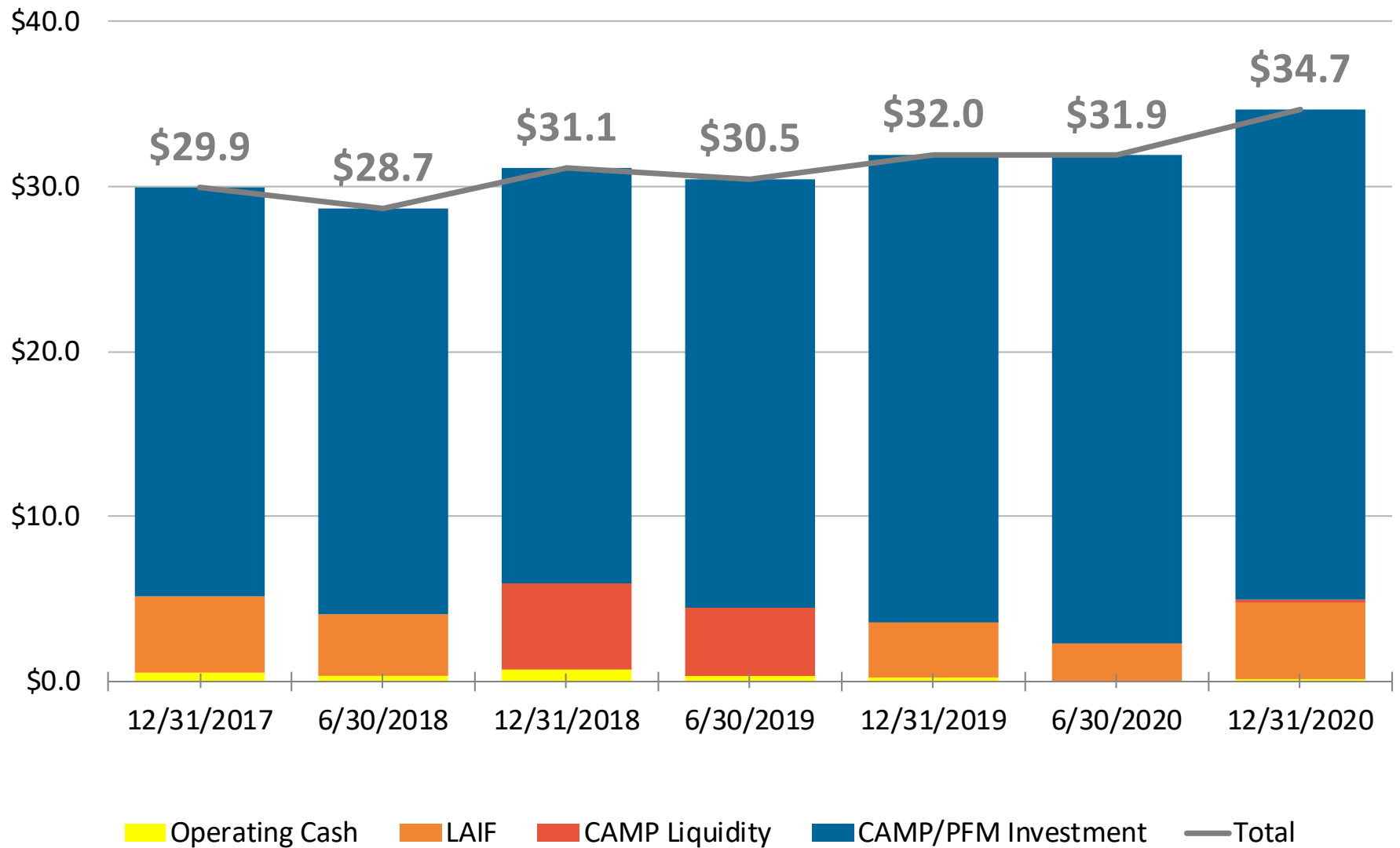
## Pooled Funds, In Millions



FINANCIAL OVERVIEW

# Cash and Investments

## All Funds, In Millions



*Fiduciary funds held on behalf of members totaled \$14,403,039 at December 31, 2021.*

FINANCIAL OVERVIEW

# Combined Statements of Net Position

## All Programs

	<u>June 30, 2020</u>	<u>June 30, 2019</u>	<u>% Change</u>
Cash & Investments	\$ 17,854,080	\$ 16,585,890	7.7%
Other Assets	530,618	571,289	-7.1%
	<hr/>	<hr/>	
Total Assets	18,384,698	17,157,179	7.2%
	<hr/>	<hr/>	
Claim Liability	\$ 4,996,067	\$ 5,291,696	-5.6%
Retrospective Adj.	6,018,880	5,347,073	12.6%
Other Liabilities	46,893	203,778	-77.0%
	<hr/>	<hr/>	
Total Liabilities	11,061,840	10,842,547	2.0%
	<hr/>	<hr/>	
<b>Net Position</b>	<b>\$ 7,322,858</b>	<b>\$ 6,314,632</b>	<b>16.0%</b>



FINANCIAL OVERVIEW

# Combined Statements of Change in Net Position All Programs

	<u>Fiscal Year End June 30, 2020</u>	<u>Fiscal Year End June 30, 2019</u>	<u>% Change</u>
Member Contributions	\$ 5,815,805	\$ 5,287,754	10.0%
Investment Income	902,036	694,324	29.9%
Operating Expenses:			
Claims Expense	1,263,447	1,106,807	14.2%
Retrospective Refunds	2,305,895	2,772,562	-16.8%
Insurance	1,429,483	1,270,737	12.5%
Dividends Received/Distributed	-	-	
Administration	710,790	692,790	2.6%
Total Expenses	<u>5,709,615</u>	<u>5,842,896</u>	<u>-2.3%</u>
Net Income	1,008,226	139,182	624.4%
Net Position, Beginning of Year	<u>6,314,632</u>	<u>6,175,450</u>	<u>2.3%</u>
<b>Net Position, End of Year</b>	<b><u>\$ 7,322,858</u></b>	<b><u>\$ 6,314,632</u></b>	<b><u>16.0%</u></b>

# Conclusions

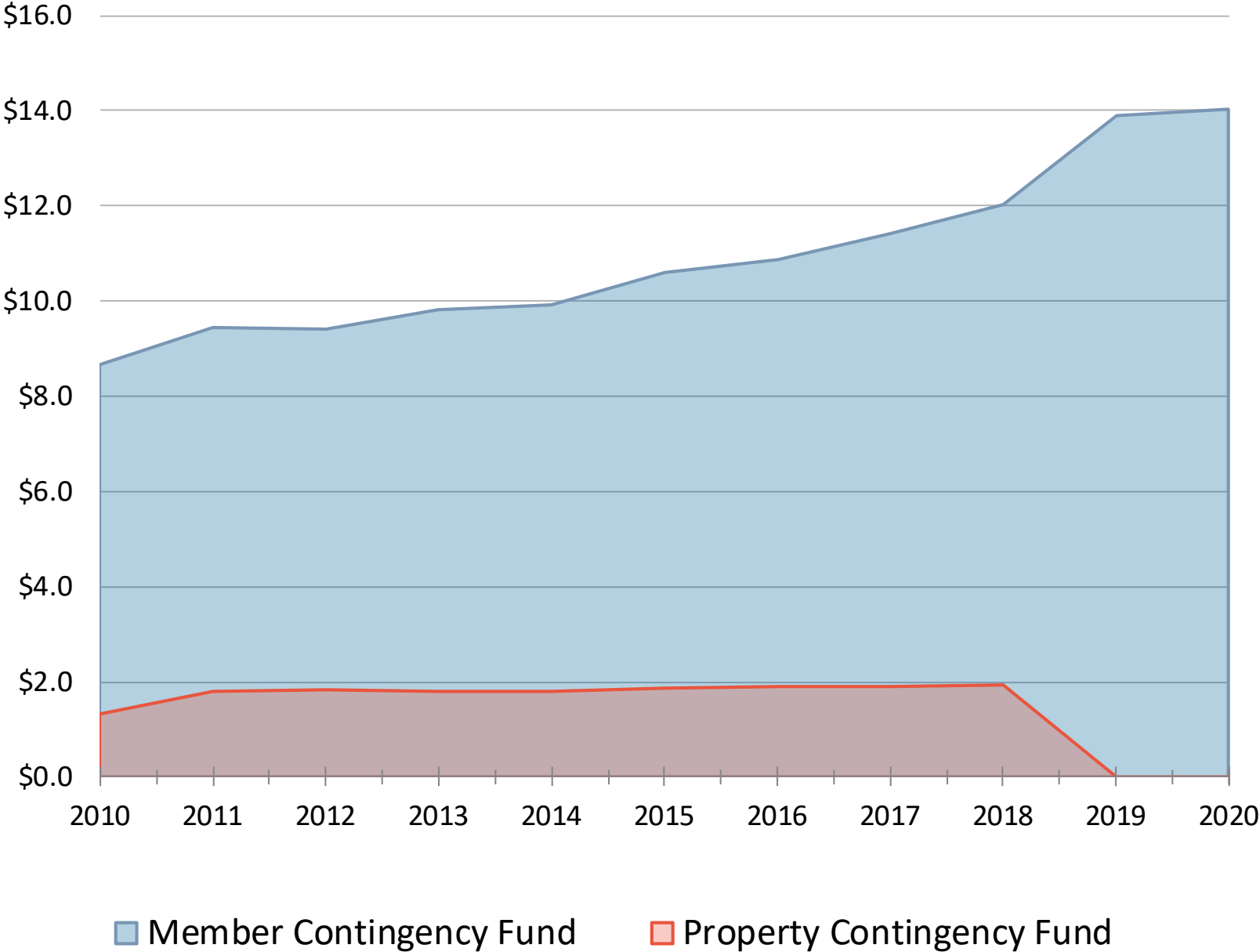
- The VCJPA maintains a healthy financial position as of June 30, 2020.
- Losses are stable for the most recent program years. Loss experience has been favorable in recent program years.
- Mid-Layer funding has helped build net position.
- Investment income providing less of an expense offset as interest rates expected to remain at historic lows.

# Member Contingency Fund

1. Deposit at any time
2. Withdrawal request needs 15-day advance notice
3. One withdrawal per quarter
4. Deposit and Withdrawal forms available on Agency's website
5. Funds are commingled with Agency funds for investment purposes
6. Balance at 12/31/2020: **\$14,403,039**

FINANCIAL OVERVIEW

# Contingency Fund Balances at December 31



*Property Contingency Fund dissolved and transferred to Member Contingency Fund as of July 1, 2019.*

# Member Contingency Fund

## PRUDENT BALANCE FUND CALCULATION

- 2 x Workers' Compensation Self-Insured Retention (SIR)
  - 2 x Liability Self-Insured Retention (SIR)
  - 2 x Auto Physical Damage Deductible (\$1,000)
  - 2 x Property Deductible (\$500)
  - 2 x Most Current Annual Contribution
- = Total Contingent Costs**

# Member Contingency Fund

## SAMPLE PRUDENT BALANCE CALCULATION

<b>Member's Selected WC SIR</b>	<b>\$25,000</b>	<b>\$ 50,000</b>
<b>Member's Selected Liability SIR</b>	<b>\$5,000</b>	<b>\$ 10,000</b>
<b>APD Deductible</b>	<b>\$1,000</b>	<b>\$ 2,000</b>
<b>Property Deductible</b>	<b>\$500</b>	<b>\$ 1,000</b>
<b>Most Recent Annual Contribution</b>	<b>\$65,000</b>	<b>\$ 130,000</b>
<b>Total Contingent Costs</b>		<b>\$ 193,000</b>
<b>Member Contingency Fund Balance</b>		<b>\$ 150,000</b>
<b>Amount Over (Under) Prudent Balance</b>		<b>\$ (43,000)</b>

**Vector Control Joint Powers Agency**  
**Member Contingency Fund - Prudent Balance Calculation**  
**As of December 31, 2020**

Member District	Self-Insurance Exposure - Two Full Limit Claims							Sub-Total Self-Insured Claims	2020/2021 Contribution Total	Two Years Contribution (2020/2021)	Total Contingent Costs	Member Contingency Fund Balances as of 12/31/2020	Amount Over / (Under) Prudent Balance
	Liability	Workers' Compensation	APD	Property	SIR*	Two Hits	\$1,000 Ded.						
	A	B = A x 2	C	D = C x 2	E = \$1,000 x 2	F = \$500 x 2	G = B + D + E + F	H	I = H x 2	J = G + I	K	L = K - J	
1 Alameda County	10,000	20,000	25,000	50,000	2,000	1,000	73,000	140,239	280,478	353,478	376,428	22,950	
2 Burney Basin	1,000	2,000	5,000	10,000	2,000	1,000	15,000	8,279	16,558	31,558	42,967	11,409	
3 Butte County	10,000	20,000	25,000	50,000	2,000	1,000	73,000	115,635	231,270	304,270	300,849	(3,421)	
4 Coachella Valley	25,000	50,000	25,000	50,000	2,000	1,000	103,000	398,763	797,526	900,526	723,977	(176,549)	
5 Coalinga-Huron	1,000	2,000	2,500	5,000	2,000	1,000	10,000	4,646	9,292	19,292	7,754	(11,538)	
6 Colusa	1,000	2,000	5,000	10,000	2,000	1,000	15,000	20,932	41,864	56,864	95,634	38,770	
7 Compton Creek	2,500	5,000	2,500	5,000	2,000	1,000	13,000	14,024	28,048	41,048	71,036	29,988	
8 Consolidated	10,000	20,000	25,000	50,000	2,000	1,000	73,000	150,494	300,988	373,988	436,674	62,686	
9 Contra Costa	50,000	100,000	50,000	100,000	2,000	1,000	203,000	282,184	564,368	767,368	1,286,492	519,124	
10 Delta	5,000	10,000	10,000	20,000	2,000	1,000	33,000	130,283	260,566	293,566	0	(293,566)	
11 Durham	1,000	2,000	2,500	5,000	2,000	1,000	10,000	8,822	17,644	27,644	4,424	(23,220)	
12 Fresno	5,000	10,000	25,000	50,000	2,000	1,000	63,000	66,401	132,802	195,802	225,239	29,437	
13 Glenn County	1,000	2,000	5,000	10,000	2,000	1,000	15,000	11,946	23,892	38,892	43,901	5,009	
14 Greater Los Angeles	75,000	150,000	50,000	100,000	2,000	1,000	253,000	614,931	1,229,862	1,482,862	1,451,342	(31,520)	
15 Kings	5,000	10,000	10,000	20,000	2,000	1,000	33,000	90,390	180,780	213,780	0	(213,780)	
16 Lake County	2,500	5,000	10,000	20,000	2,000	1,000	28,000	51,398	102,796	130,796	144,076	13,280	
17 Los Angeles County West	25,000	50,000	25,000	50,000	2,000	1,000	103,000	341,089	682,178	785,178	683,316	(101,862)	
18 Marin-Sonoma	50,000	100,000	50,000	100,000	2,000	1,000	203,000	263,054	526,108	729,108	840,490	111,382	
19 Napa County	5,000	10,000	25,000	50,000	2,000	1,000	63,000	73,197	146,394	209,394	1,336,634	1,127,240	
20 No Salinas Valley	2,500	5,000	25,000	50,000	2,000	1,000	58,000	55,148	110,296	168,296	632,519	464,223	
21 Northwest	5,000	10,000	25,000	50,000	2,000	1,000	63,000	136,283	272,566	335,566	351,203	15,637	
22 Orange County	25,000	50,000	50,000	100,000	2,000	1,000	153,000	737,254	1,474,508	1,627,508	450,894	(1,176,614)	
23 Oroville	1,000	2,000	2,500	5,000	2,000	1,000	10,000	3,263	6,526	16,526	12,176	(4,350)	
24 Pine Grove	1,000	2,000	2,500	5,000	2,000	1,000	10,000	6,860	13,720	23,720	33,105	9,385	
25 Placer	1,000	2,000	10,000	20,000	2,000	1,000	25,000	141,329	282,658	307,658	213,598	(94,060)	
26 Sacramento-Yolo	50,000	100,000	50,000	100,000	2,000	1,000	203,000	359,159	718,318	921,318	1,677,632	756,314	
27 San Gabriel Valley	10,000	20,000	50,000	100,000	2,000	1,000	123,000	215,705	431,410	554,410	136,353	(418,057)	
28 San Joaquin County	50,000	100,000	50,000	100,000	2,000	1,000	203,000	231,856	463,712	666,712	736,682	69,970	
29 San Mateo County	10,000	20,000	25,000	50,000	2,000	1,000	73,000	196,282	392,564	465,564	509,873	44,309	
30 Santa Barbara County	2,500	5,000	5,000	10,000	2,000	1,000	18,000	37,182	74,364	92,364	73,321	(19,043)	
31 Shasta	2,500	5,000	25,000	50,000	2,000	1,000	58,000	99,140	198,280	256,280	264,742	8,462	
32 Sutter-Yuba	10,000	20,000	25,000	50,000	2,000	1,000	73,000	90,199	180,398	253,398	369,778	116,380	
33 Tehama County	1,000	2,000	10,000	20,000	2,000	1,000	25,000	33,498	66,996	91,996	284,793	192,797	
34 Turlock	10,000	20,000	25,000	50,000	2,000	1,000	73,000	77,205	154,410	227,410	259,195	31,785	
35 West Valley	10,000	20,000	25,000	50,000	2,000	1,000	73,000	136,046	272,092	345,092	325,943	(19,149)	
<b>Total</b>	<b>476,500</b>	<b>953,000</b>	<b>782,500</b>	<b>1,565,000</b>	<b>70,000</b>	<b>35,000</b>	<b>2,623,000</b>	<b>5,343,116</b>	<b>10,686,232</b>	<b>13,309,232</b>	<b>14,403,039</b>	<b>1,093,807</b>	

\* Self-Insured Retention (SIR)

**POOLED WORKERS' COMPENSATION PROGRAM**

**SUBJECT: General Overview of Program Structure, Review of Financial Position, and Claims Overview**

---

**BACKGROUND AND STATUS:**

The Pooled Workers' Compensation Program provides workers' compensation coverage up to statutory per occurrence and employer's liability coverage up to \$5 million per occurrence. The Program consists of the following components:

**Primary Pool:**

**Risk Sharing (Pooling) Layer:**

Each member has selected a \$2,500, \$5,000, \$10,000, \$25,000, or \$50,000 retained limit. Coverage excess of the individual member retained limit up to \$250,000 is risk shared (pooled) with the other member districts. VCJPA pays first dollar coverage meaning the full amount of a claim is paid by the VCJPA. The amount each district is responsible for, which is the district's retained limit plus their portion of the risk sharing layer, is charged to their account through the annual retrospective adjustment process five years after the end of a program year. Through this process:

- The program year costs, including claim costs, are subtracted from the deposit premium collected for the program year.
- Each program year is accounted for separately.
- The calculation is performed annually until such time as a program year is closed.
- A program year can be closed when all claims are closed and the incurred but not reported reserves are zero. The actuary calculates the incurred but not reported reserves to estimate the probability a claim will be filed that has yet to be reported.

**Mid-Layer:**

A Mid-Layer Pool provides coverage in the \$250,001 to \$500,000 layer. The Mid-Layer Pool is accounted for separately and is a mandatory component of the Program. The purpose of the Mid-Layer Pool is to reduce the effect of severe claims impacting the risk sharing layer of the Program. Historically, the Mid-Layer Pool was funded through periodic member contributions. In order to build equity, in 2018 the Board approved an allocation to the Mid-Layer Pool from the total retrospective adjustment refund approved in November 2018. Effective July 1, 2019, the Mid-Layer Pool is being funded over a five-year period by retaining 50% of the annual retrospective adjustment refund amount declared and collecting \$138,000 per year from the members through the annual budget. The plan is reviewed annually.



**Agenda Item 4.A., Page 2**

Aggregate Pool:

There is also an Aggregate Pool which is currently being funded by collecting \$86,000 per program year from the members through the annual budget. The Aggregate Pool's purpose is to protect member districts against frequent losses. This Pool provides a limit beyond which no further losses of a program year may be charged to any one district. The attachment point is currently two times a member district's retained limit. Should the amount of a claim exceed a member district's aggregate limit, the remaining amount of the claim is spread among all of the member districts.

The Aggregate Pool and the Mid-Layer Pool are non-equity. This means the funds are not allocated to an individual member's account. Therefore, if a member leaves the VCJPA, they leave behind all rights to these funds. However, distributions can be declared to current members of the Program.

Excess Coverage:

Coverage excess of \$500,000 to \$5 million is pooled with other joint powers authorities and public entities through the Local Agency Workers' Compensation Excess JPA (LAWCX), and coverage above \$5 million to statutory is group purchased through LAWCX by LAWCX's participation in Public Risk Innovation, Solutions, and Management (PRISM) (formerly CSAC-EIA). Andy Cox and Wes Maffei serve on the LAWCX Board representing VCJPA.

Staff will review the Program, including the results of the equity building in the Mid-Layer and Aggregate Pools, and discuss any changes that have occurred since the last Annual Workshop. Ms. Tammy Vitali, Workers' Compensation Program Manager, will also provide a three-year analysis of claims by month, discuss the impact seasonal employees have on claims experience, demonstrate the value of return-to-work, and the causation of the injuries sustained in 2020.

**REFERENCE MATERIALS ATTACHED:**

- Pooled Workers' Compensation Program – Charts and Graphs:
  - Workers' Compensation Program Coverage Outline
  - Retrospective Adjustment Formula
  - Workers' Compensation Pool Funds
  - Estimated Ultimate Losses
  - Ultimate Loss Components
  - Net Position by Fiscal Year
  - Net Position of the Mid-Layer
  - Workers' Compensation Program Combining Financial Statements as of June 30, 2020
  - Target Equity Ratios
  - Workers' Compensation Total Claims by Month for 2018, 2019, and 2020
  - Losses by Department/Area for 2018, 2019, and 2020
  - Average Per Claim Cost by Department/Area for 2018, 2019, and 2020
  - Return to Work – Medical Only Claims where Modified Duty was Provided vs. Indemnity Claims for 2018, 2019, and 2020

**Agenda Item 4.A., Page 3**

- 2020 Claims for Seasonal and Permanent Employees
- 2020 Average Cost Per Claim by Cause of Injury
- Seasonal Injuries Impact of Claims Filed in 2020
- Excess Workers' Compensation Program – Graphs and Information:
  - LAWCX Net Position as of June 30, 2020
  - PRISM Menu of Services and Partner Programs

# Workers' Compensation Coverage

**LIBERTY INSURANCE CORP.  
GROUP PURCHASED THROUGH PRISM**  
**\$50M to Statutory Limits**

**ACE AMERICAN INSURANCE COMPANY  
GROUP PURCHASED THROUGH PRISM**  
**\$5M to \$50M**

**LAWCX POOLED LAYER**  
**\$500,000 to \$5M**

**VCJPA MID-LAYER POOL**  
**\$250,000 to \$500,000**

**VCJPA PRIMARY POOL**  
**RETAINED LIMIT to \$250,000**

**MEMBER RETAINED LIMIT**  
**VARIES BY MEMBER ELECTION:**  
**\$2,500 \$5,000 \$10,000 \$25,000 \$50,000**

# Workers' Compensation Program

The retrospective adjustment formula:

ACTIVITY	METHOD OF ALLOCATION TO MEMBER
+ DEPOSIT PREMIUM	ACTUAL AMOUNT PAID
+ INTEREST	DEPOSIT PREMIUM
- LOSSES WITHIN RETAINED LIMIT (PAID + CASE RESERVES)	MEMBER SPECIFIC
- POOLED LOSSES INCURRED (PAID + CASE RESERVES)	PAYROLL
- AGGREGATE STOP LOSS	RETAINED LIMIT
- IBNR (ACTUARIALLY DETERMINED LIABILITY)	DEPOSIT PREMIUM
- EXCESS INSURANCE COST (ACTUAL)	PAYROLL
- ADMINISTRATIVE COSTS (ACTUAL)	DEPOSIT PREMIUM
- CLAIMS ADJUSTING COSTS (ACTUAL)	50% PAYROLL/50% # OF CLAIMS
= MEMBER EQUITY (SURPLUS OR DEFICIT)	

# Workers' Compensation Pool Funds


## Primary Layer

- **Funded annually at 85% confidence level based on actuarial study**
- **Losses have developed favorable in recent years**
- **Each policy year stands alone, evaluated via annual report**
- **Net Position at 6/30/2020 = \$1.5M**

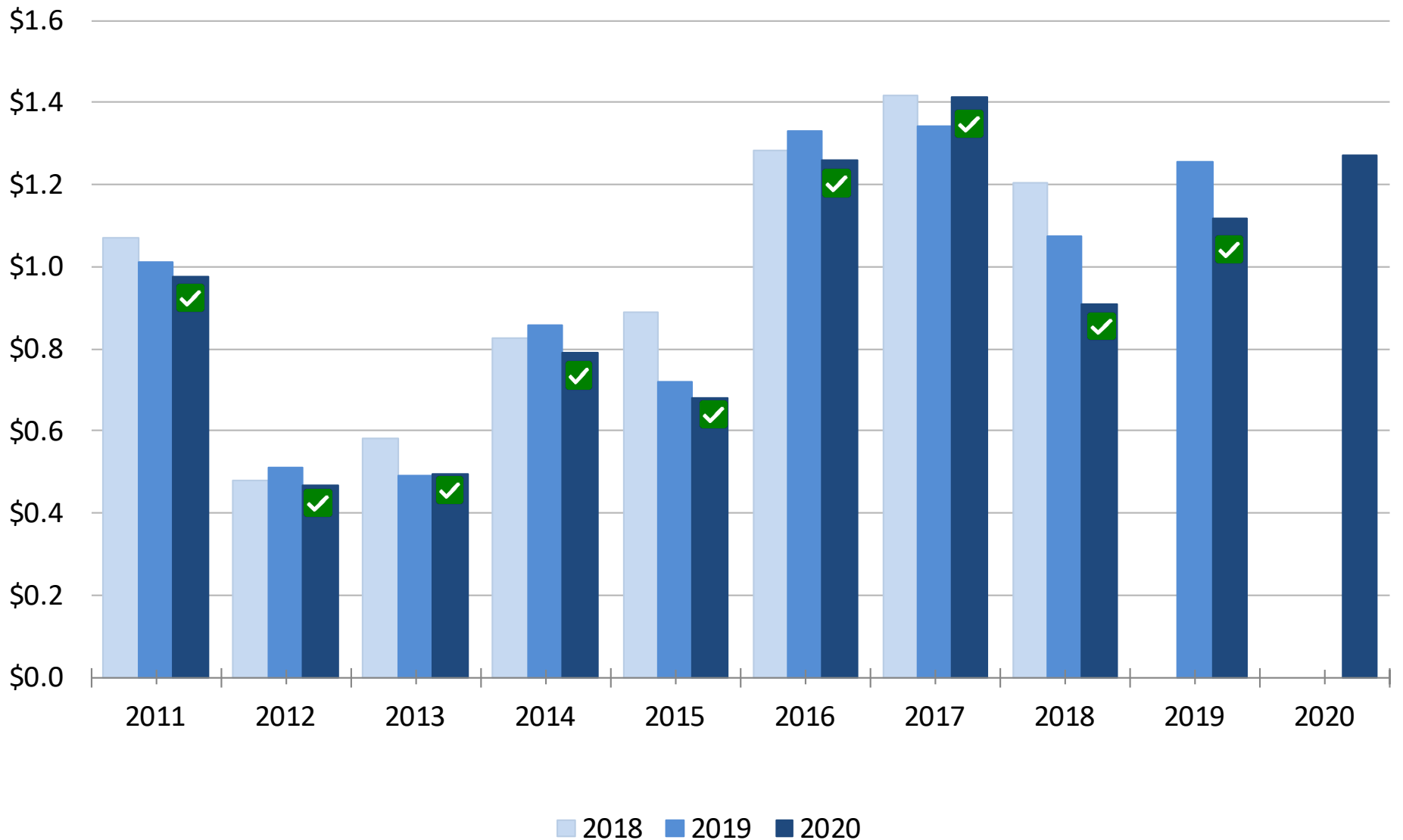
## Aggregate Pool

- **Protects against frequency**
- **Aggregate stop-loss = 2 times Retained Limit**
- **Net Position at 6/30/2020 = \$442k**

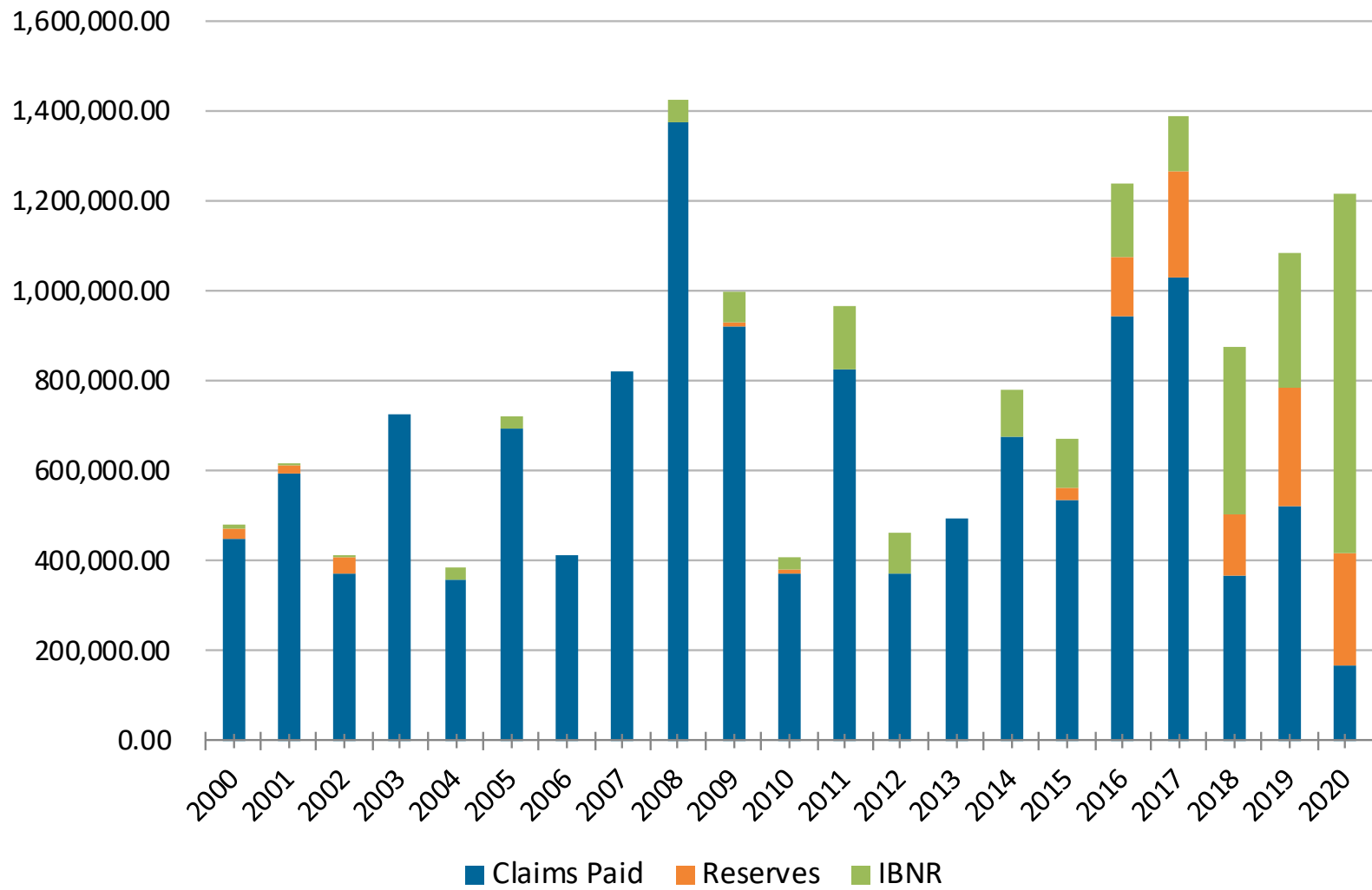
## Mid-Layer Pool

- **Protects against severity (\$250k to \$500k)**
- **Net Position at 6/30/2020 = \$1.4m (5.7 x full \$250k hits)**
- **Improved from 2.92 times as of 6/30/2019** 

# Estimated Ultimate Loss Current vs. Prior Estimates

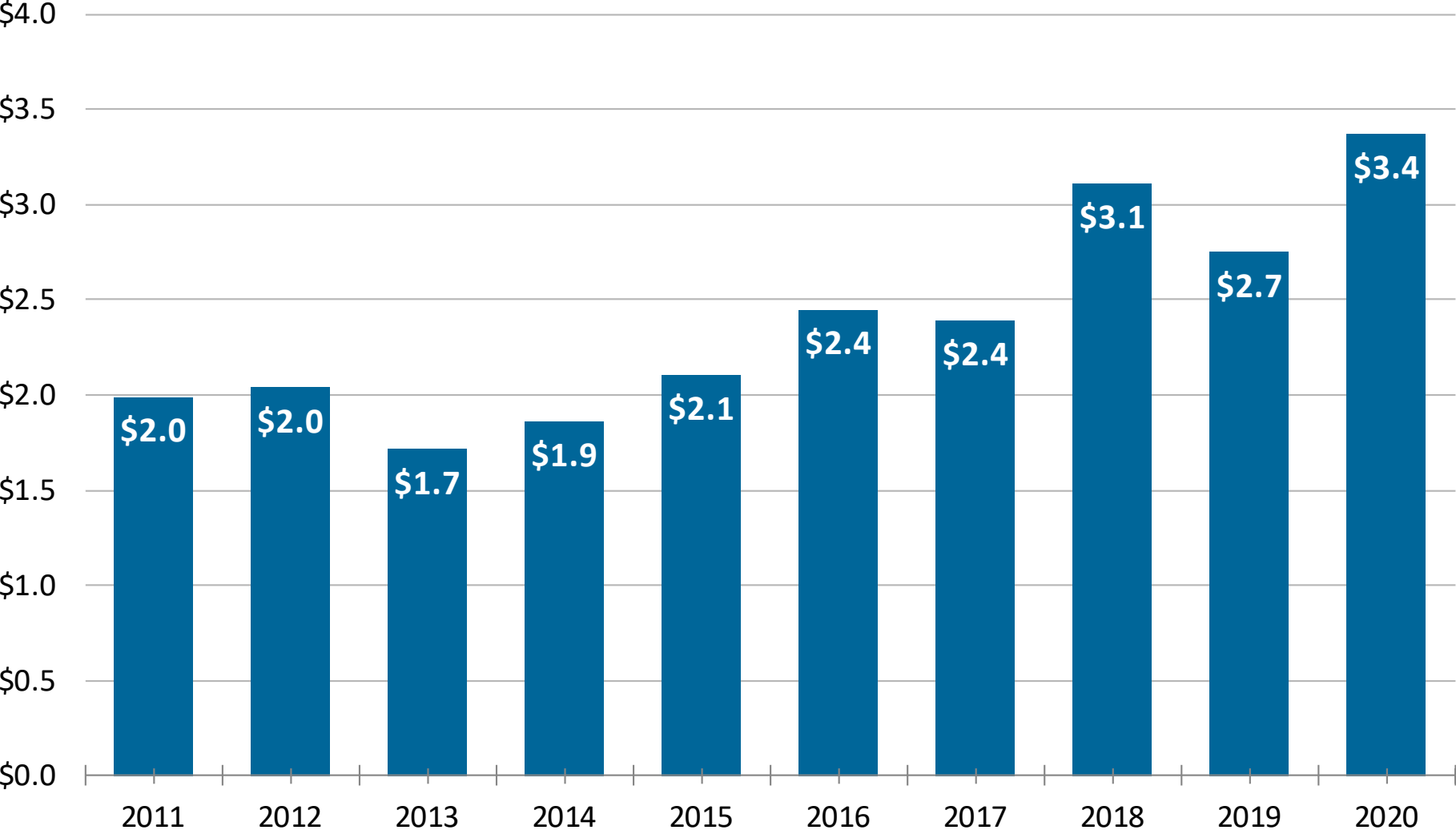


# Ultimate Loss Components As of June 30, 2020



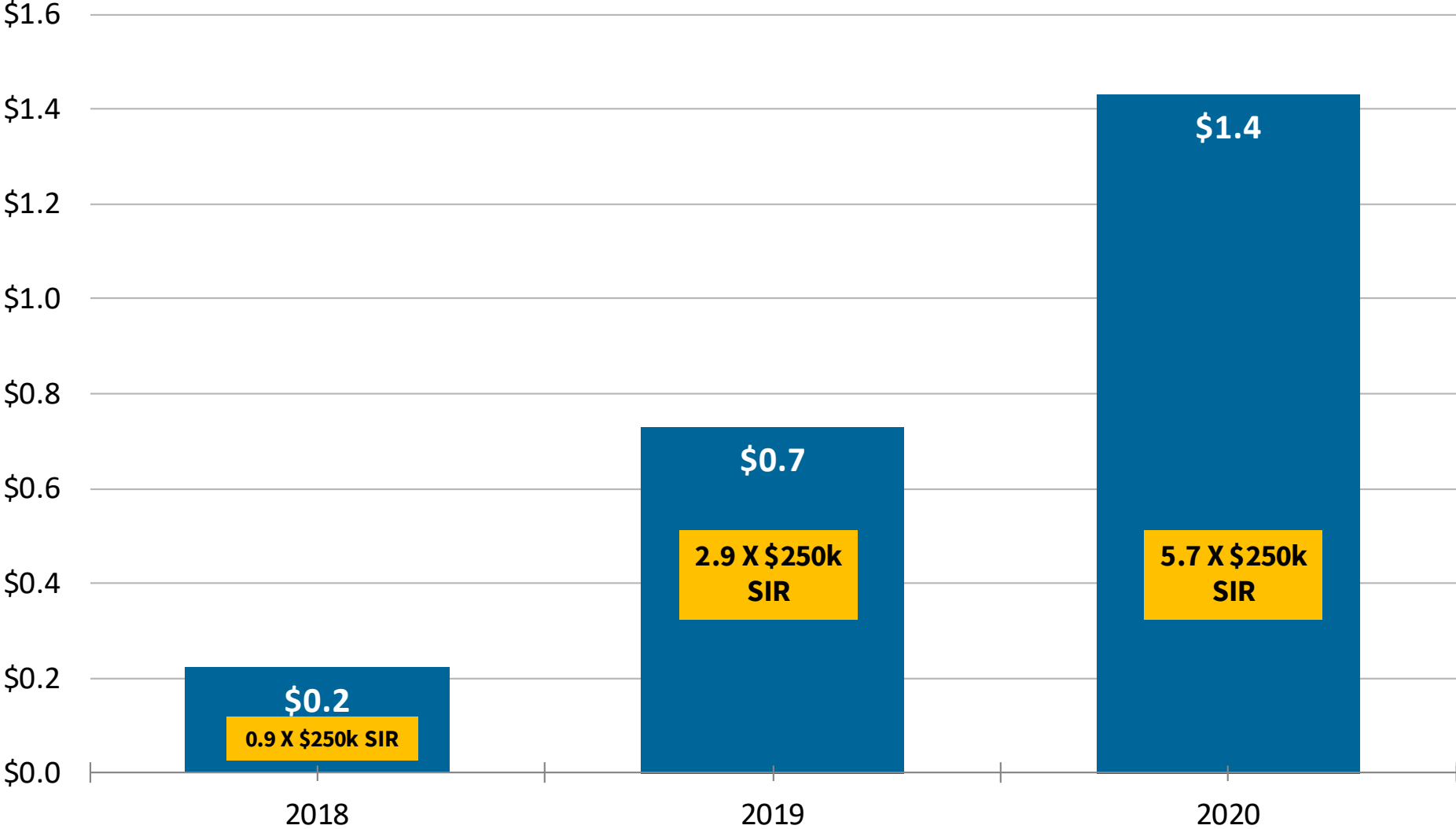
# Net Position by Fiscal Year

## Pooled Funds, In Millions





# Net Position of the Mid-Layer



POOLED WORKERS' COMPENSATION PROGRAM OVERVIEW

# Workers' Compensation Financial Statements Combining at June 30, 2020

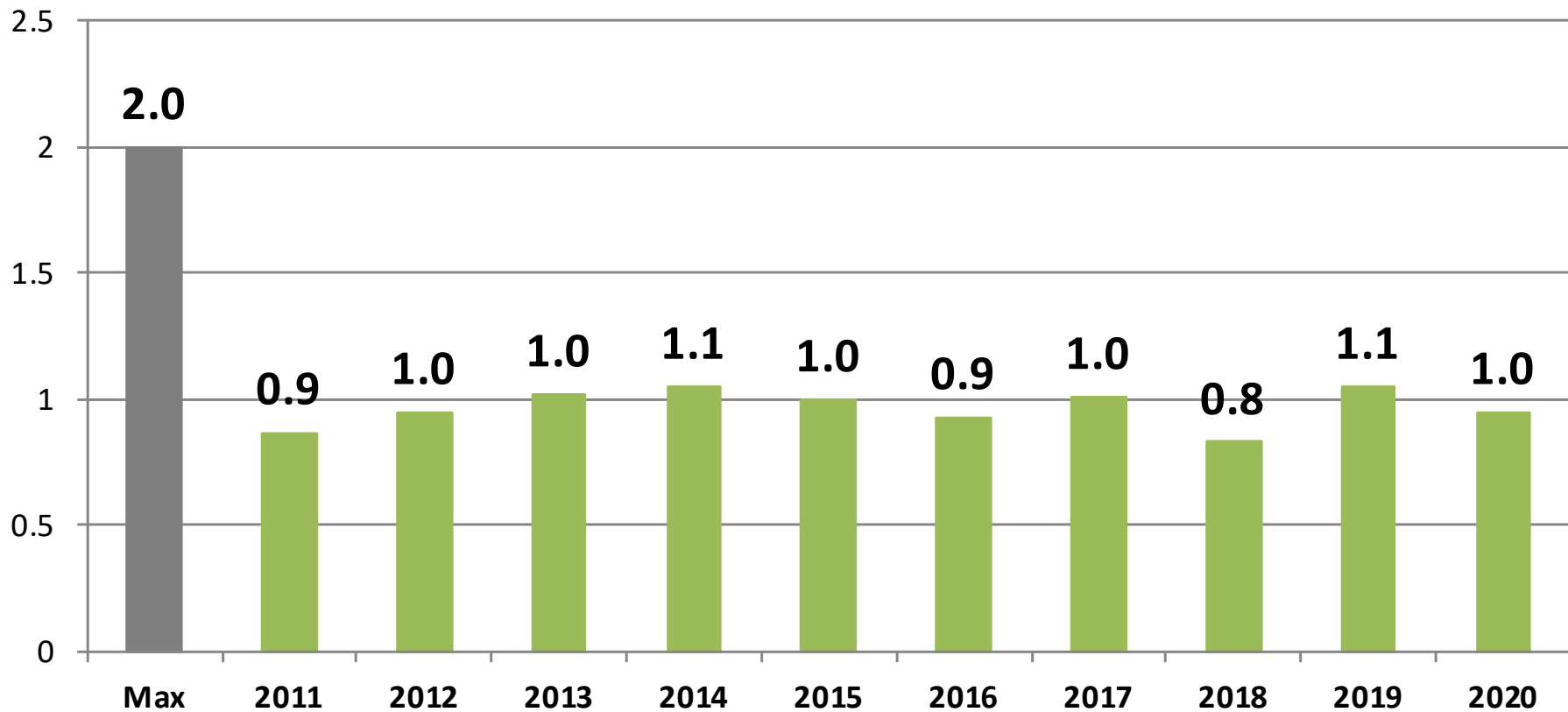
	Primary	Aggregate	Mid-Layer	Total
<b>Total Assets</b>	<b>\$ 8,543,034</b>	<b>\$ 442,710</b>	<b>\$ 2,531,265</b>	<b>\$ 11,517,009</b>
Claim Liabilities	3,559,535		1,099,000	4,658,535
Retrospective Adjustmer Assessment Payable	3,488,935 -			3,488,935
<b>Total Liabilities</b>	<b>7,048,470</b>	<b>-</b>	<b>1,099,000</b>	<b>8,147,470</b>
<b>Net Net Position</b>	<b>\$ 1,494,564</b>	<b>\$ 442,710</b>	<b>\$ 1,432,265</b>	<b>\$ 3,369,539</b>
Member Contriubutions	<b>\$ 2,706,832</b>	<b>\$ 86,000</b>	<b>\$ 788,000</b>	<b>\$ 3,580,832</b>
Investment Income	442,316	30,158	135,866	608,340
Claims Expense	(708,576)	(133,495)	(221,715)	(1,063,786)
Retrospective Refunds	(1,858,381)			(1,858,381)
Insurance	(381,111)			(381,111)
Administration	(265,114)			(265,114)
<b>Net Income (Loss)</b>	<b>\$ (64,034)</b>	<b>\$ (17,337)</b>	<b>\$ 702,151</b>	<b>\$ 620,780</b>

# Target Equity Ratios

- *Guidance* for Board in development of *annual funding, dividend and assessment decisions*
- Provide benchmarks to *monitor* the pool's *financial stability*
- Ratios are widely used in the pooling and insurance industry
- Focus is on identification of trends
- Equity also referred to as “Net Position” or “Surplus”

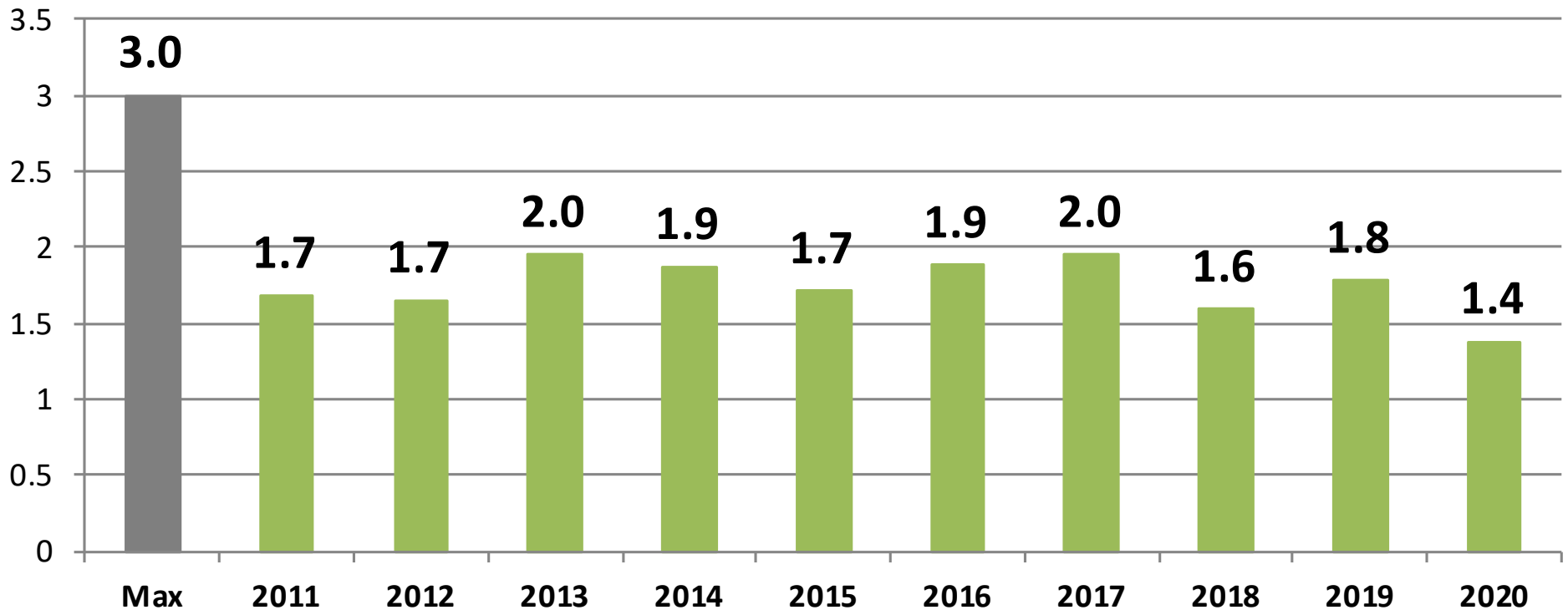
# Target Equity Ratios – WC Program

## Ratio A: Net Contribution to Equity



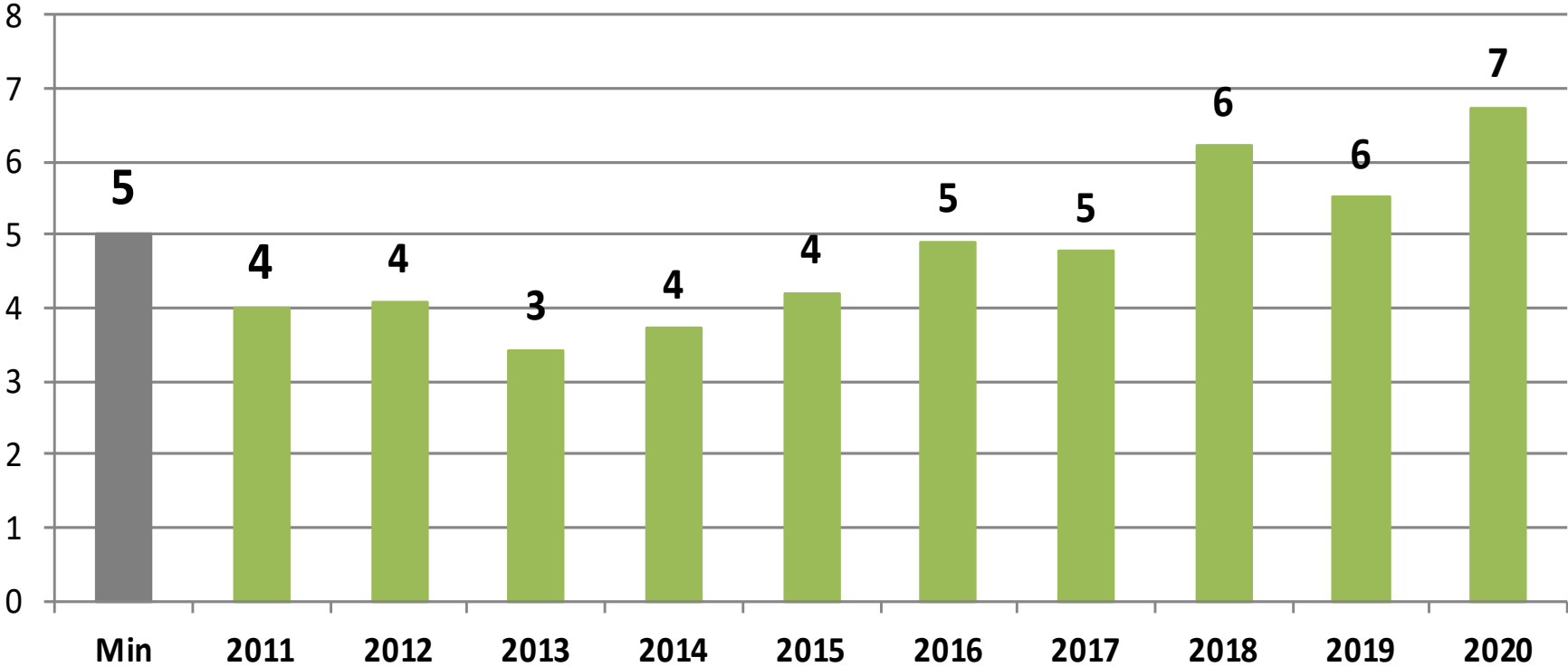
# Target Equity Ratios – WC Program

## Ratio B: Net Loss Reserves to Equity



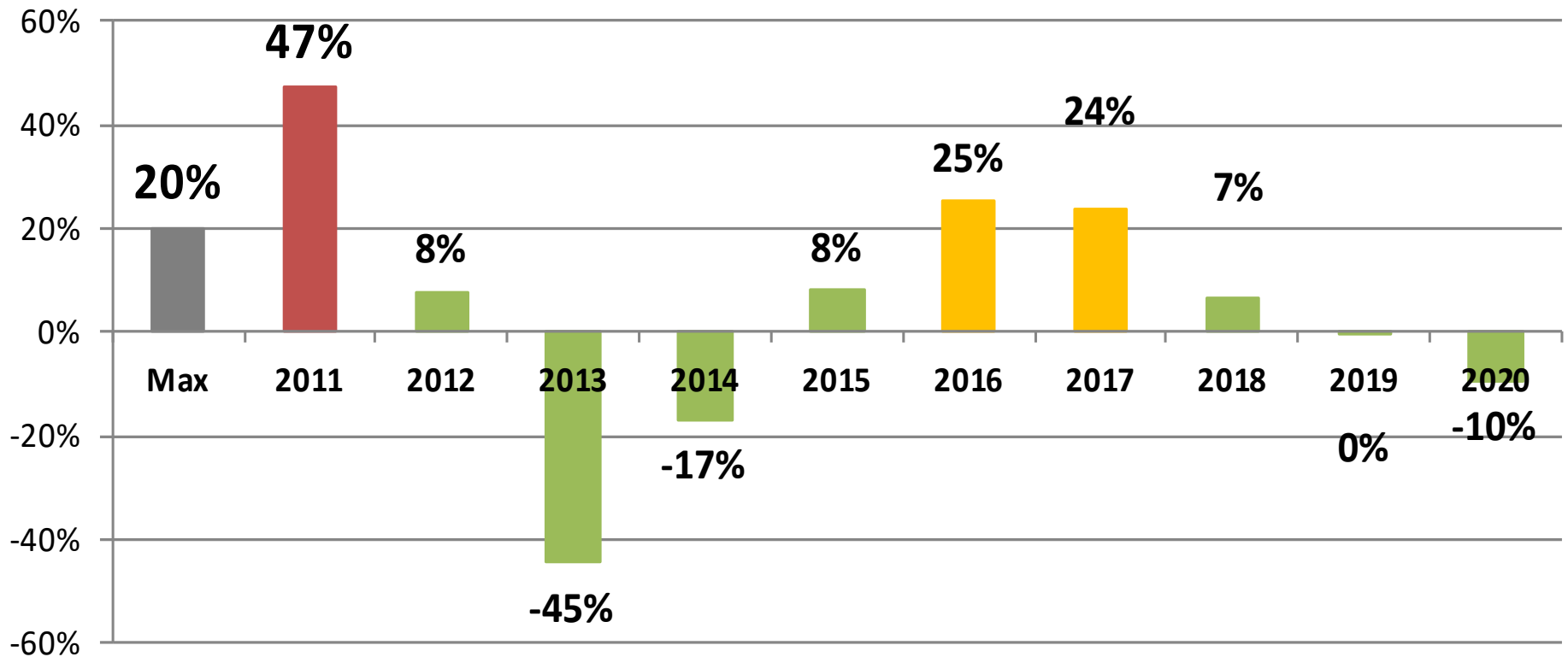
# Target Equity Ratios – WC Program

## Ratio C: Equity to Self-Insured Retention



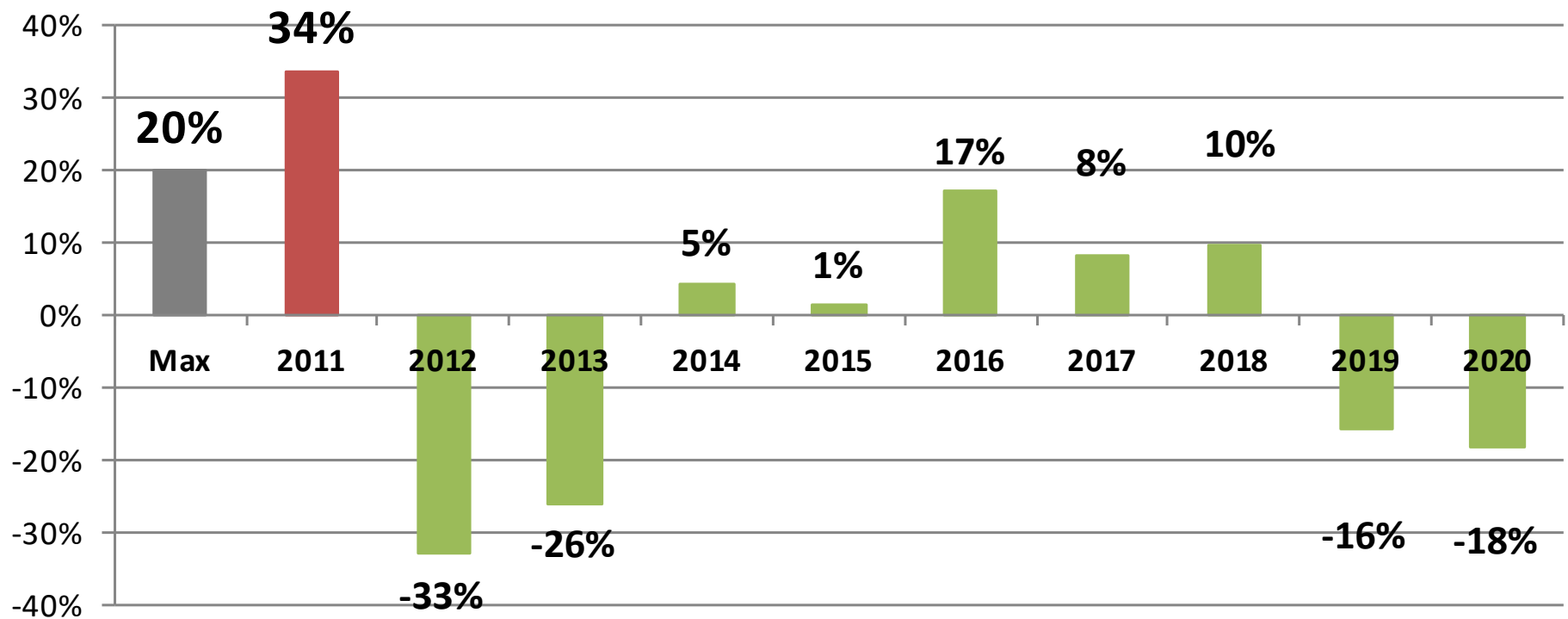
# Target Equity Ratios – WC Program

## Ratio D: One-Year Reserve Development



# Target Equity Ratios – WC Program

## Ratio E: Two-Year Reserve Development

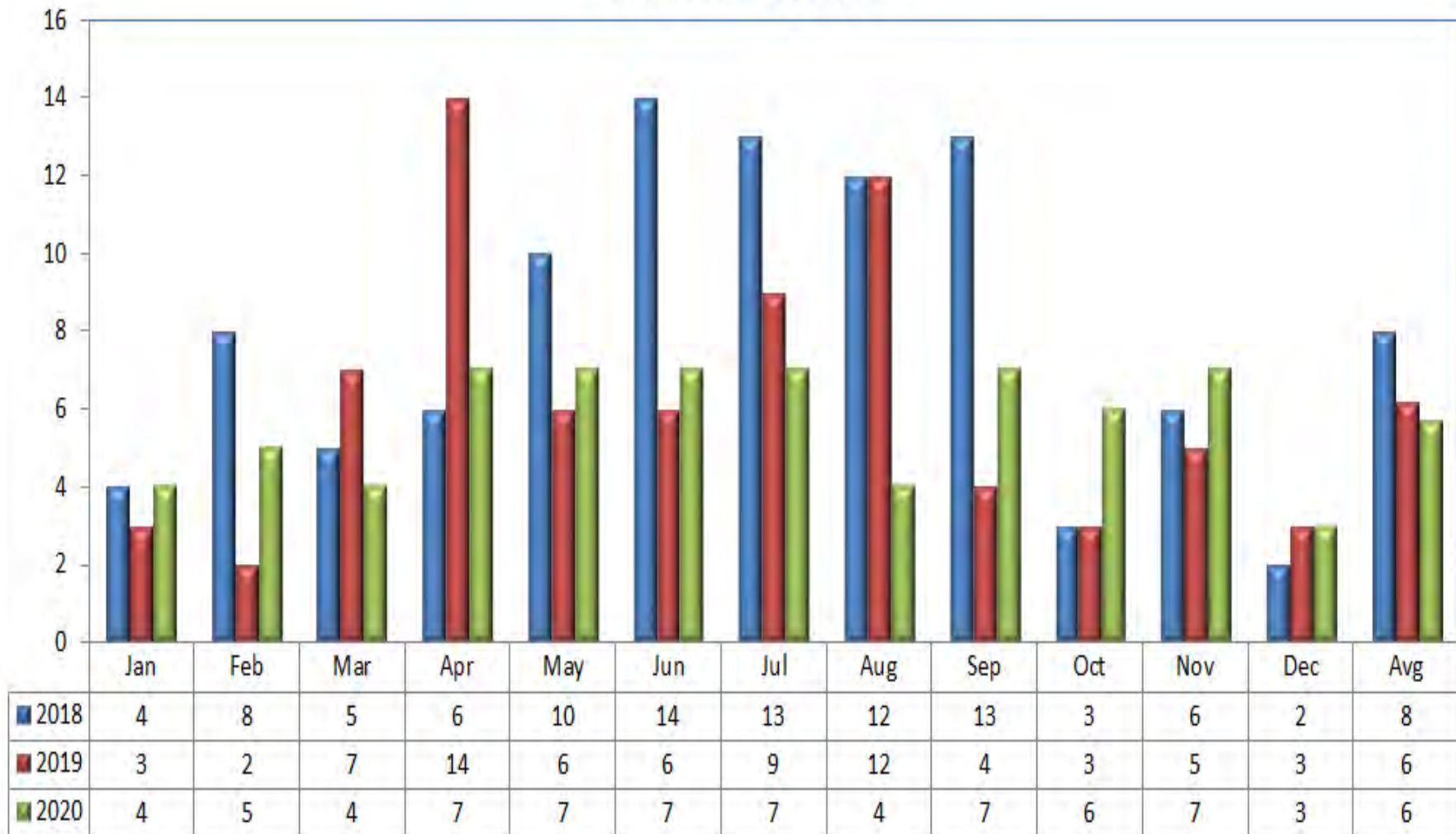




# POOLED WORKERS' COMPENSATION PROGRAM OVERVIEW

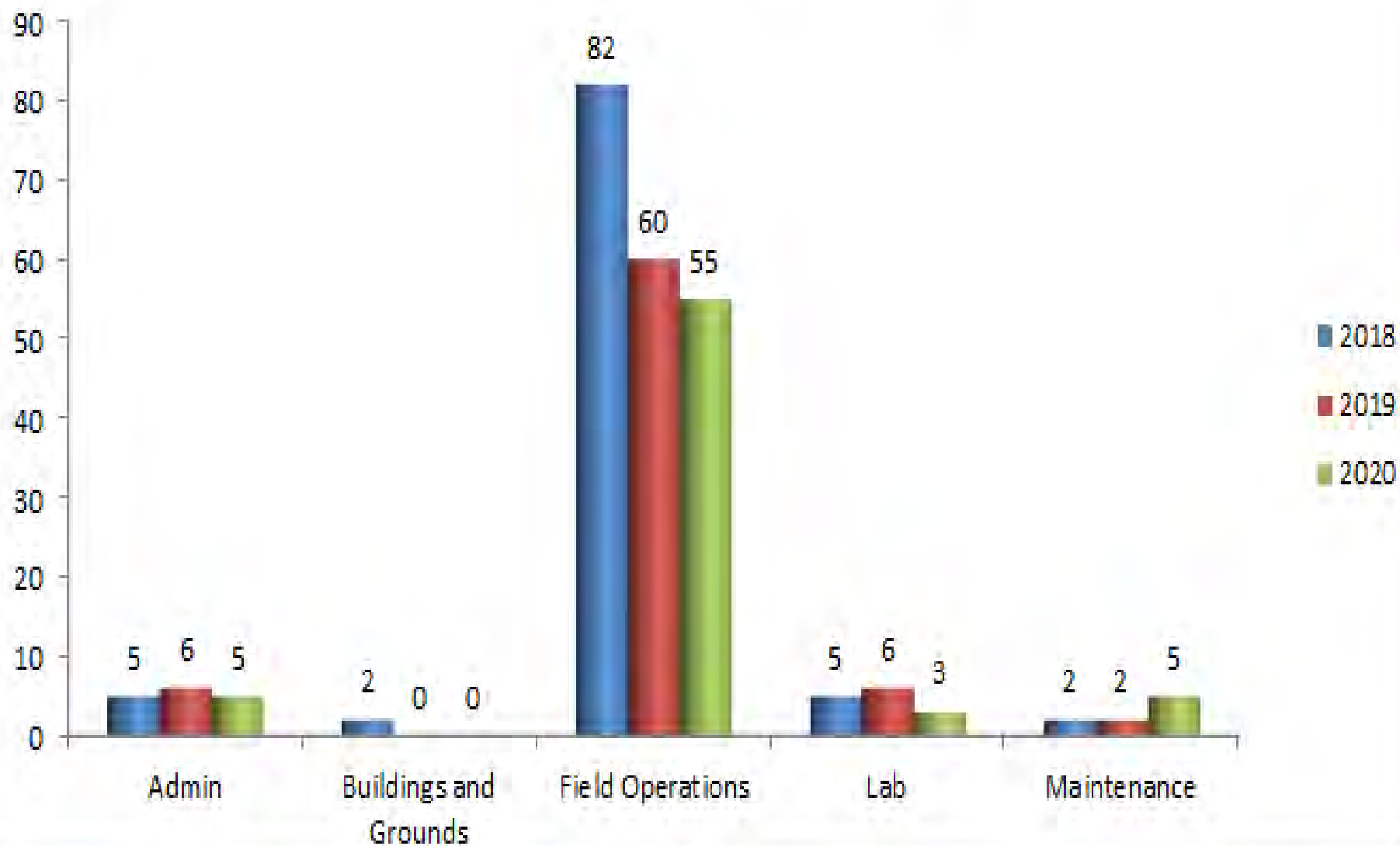
## Workers' Compensation

### Total Claims By Month



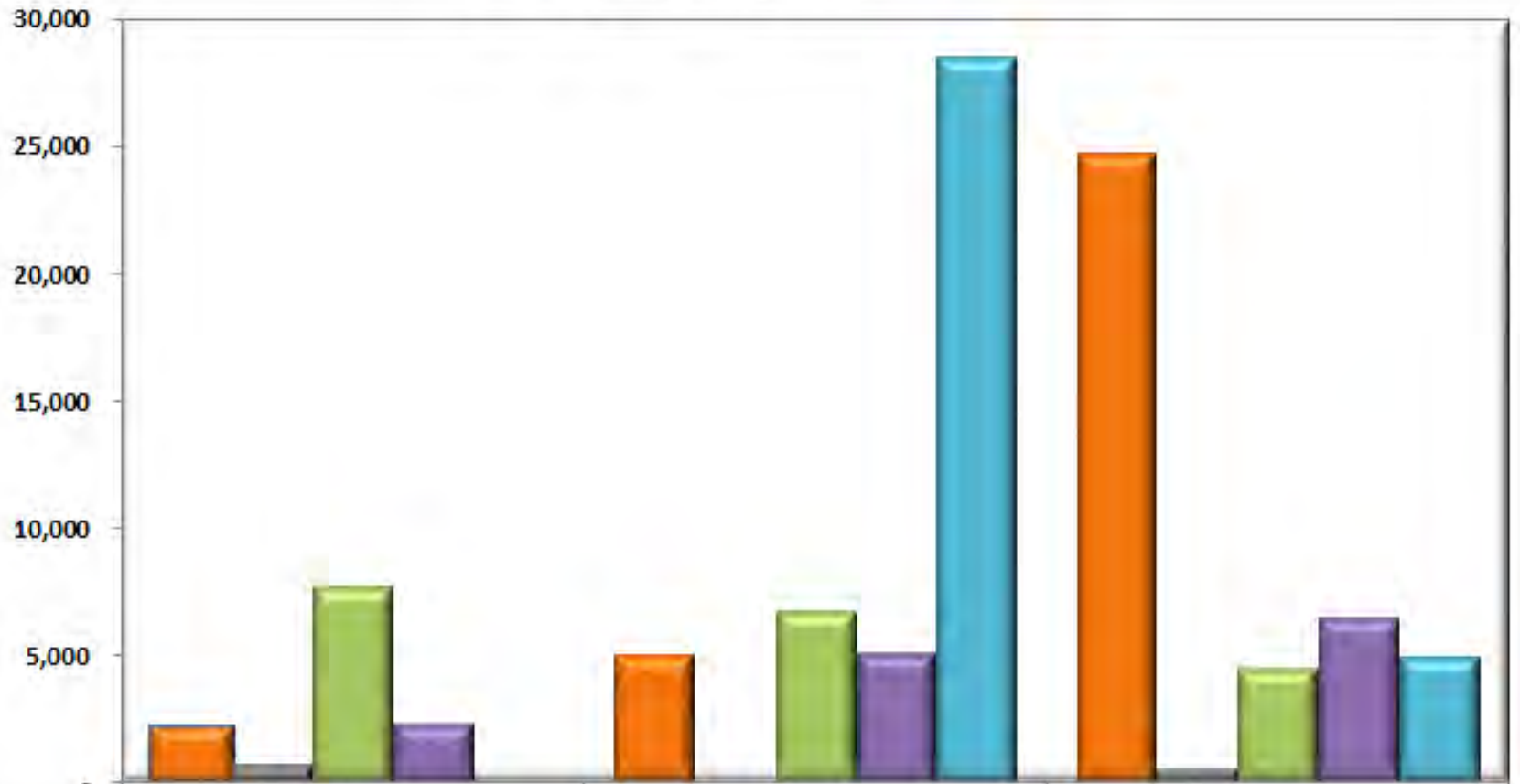
## Workers' Compensation

### Claim Count by Department



## Workers' Compensation

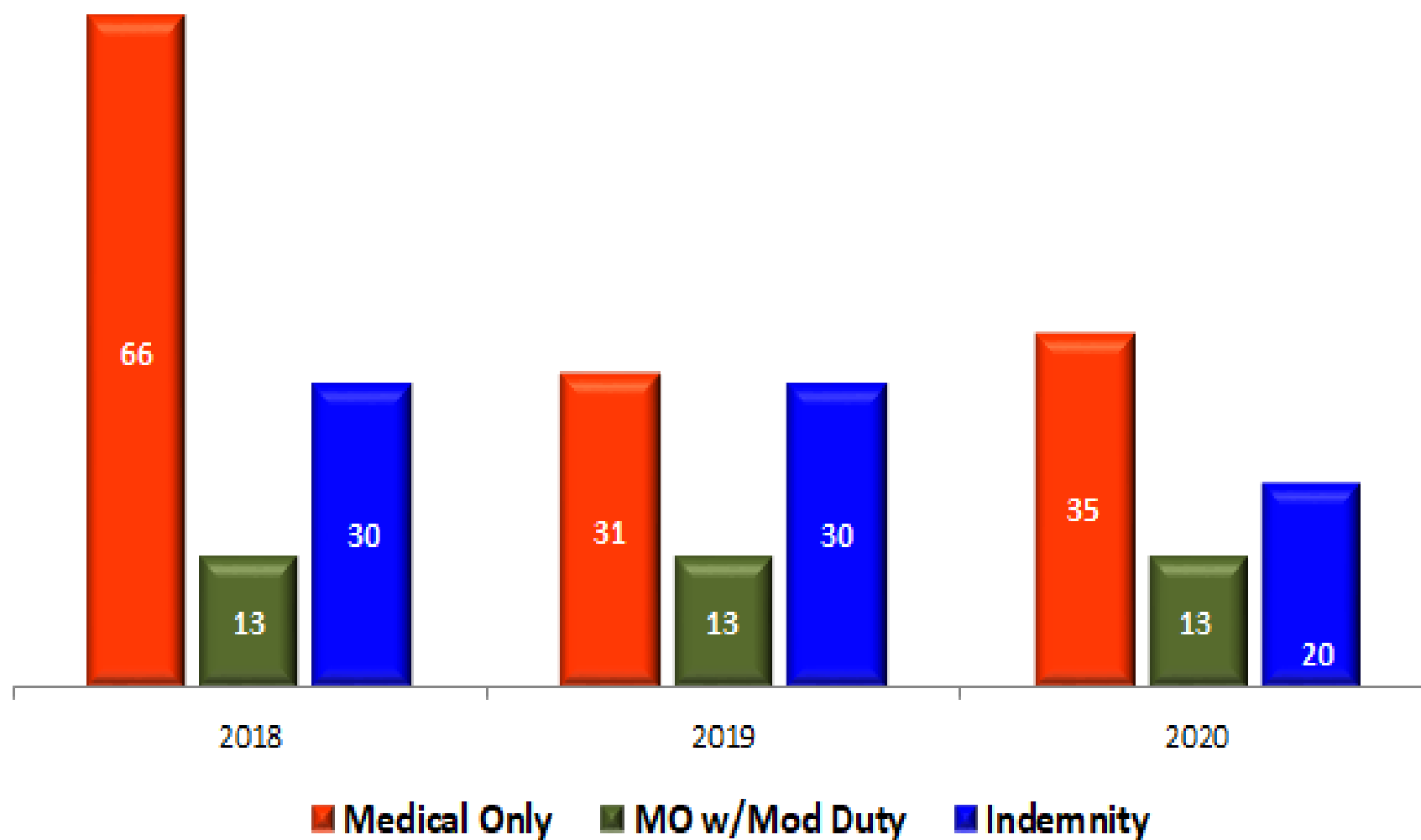
### Average Claim Cost

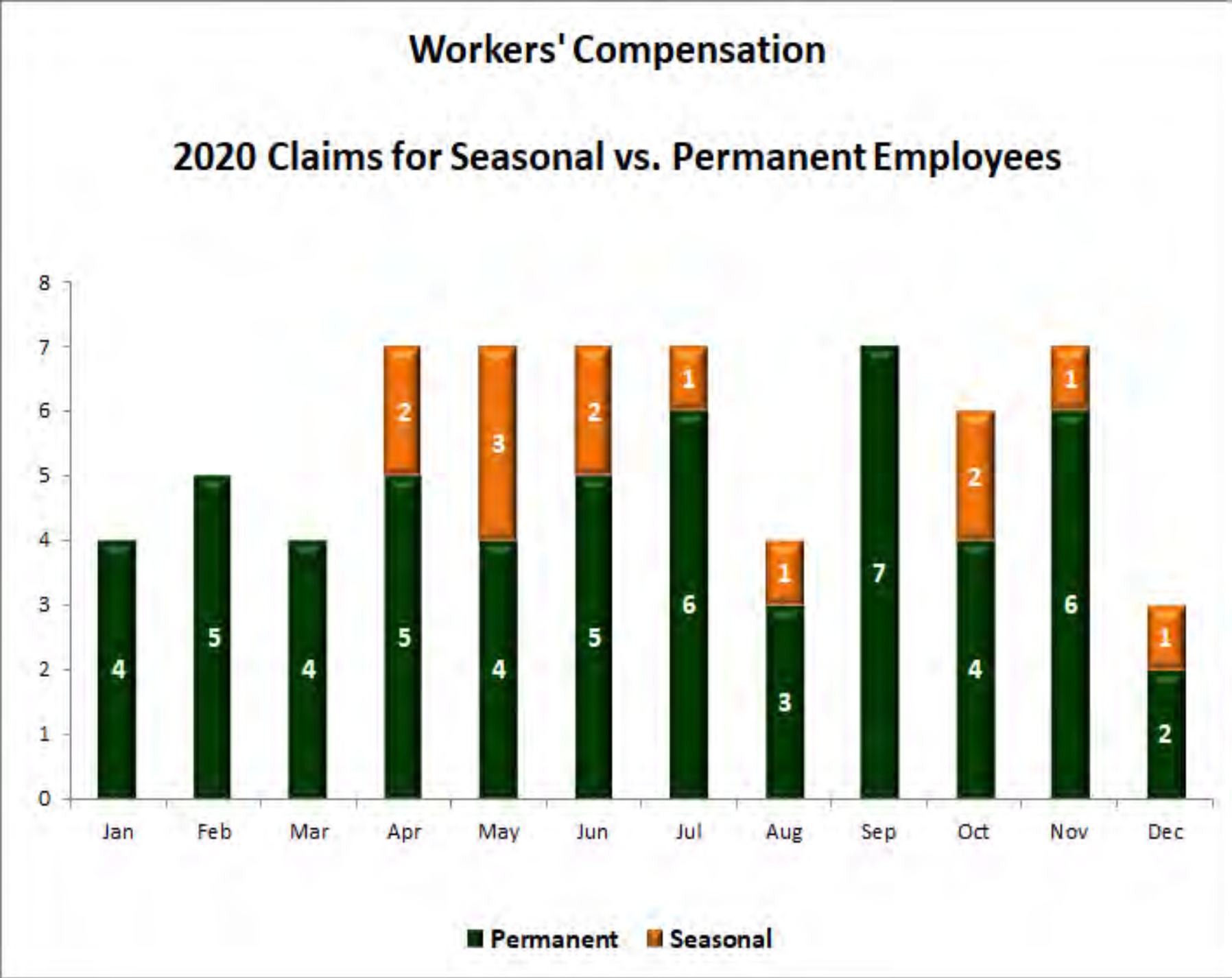


	2018	2019	2020
Admin	2,214	5,060	24,733
Buildings and Grounds	641	-	461
Field Operations	7,619	6,722	4,448
Lab	2,315	5,078	6,435
Maintenance	91	28,528	4,973

## Workers' Compensation

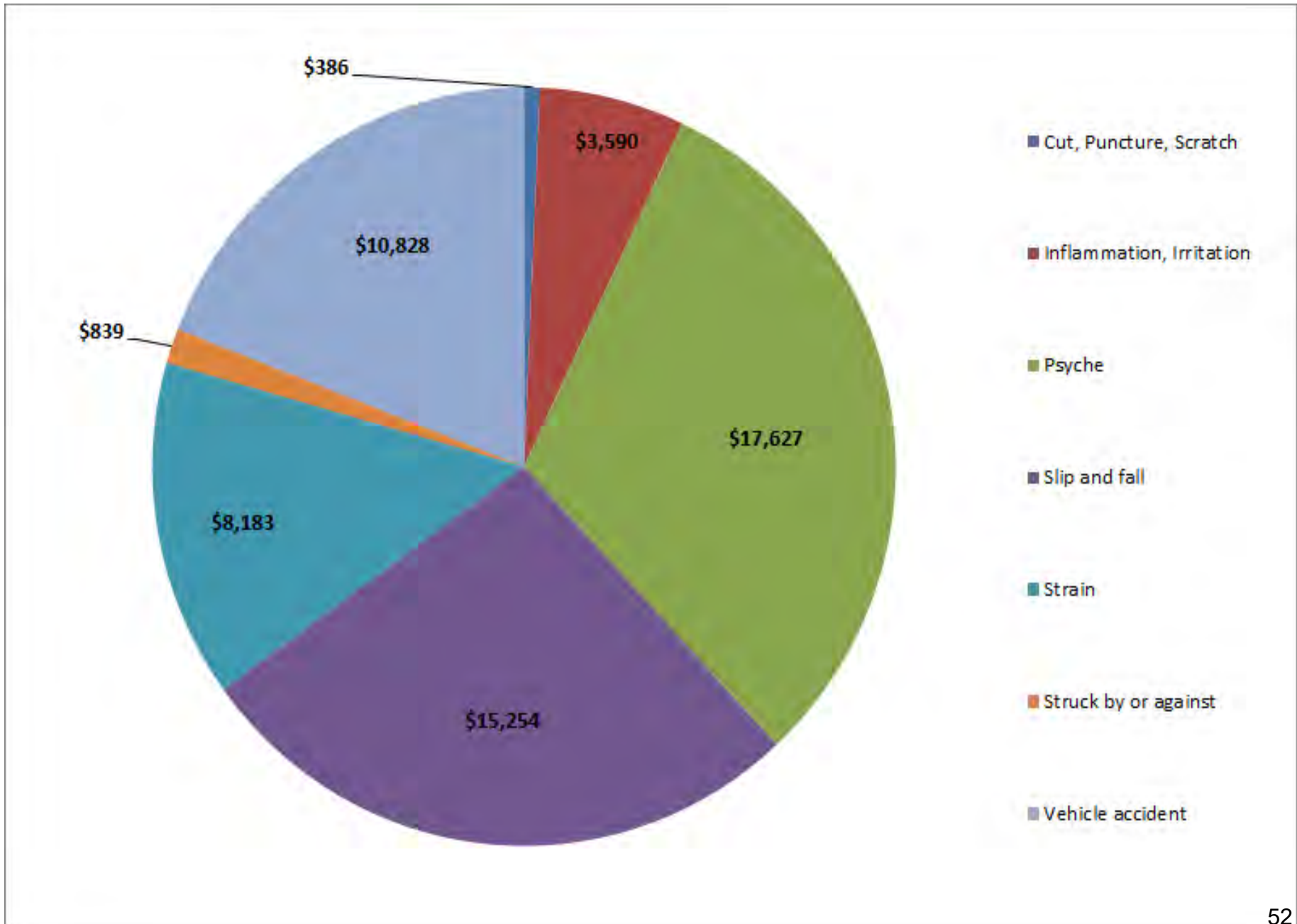
### Modified Duty Accommodations





# Workers' Compensation

## 2020 Average Cost Per Claim by Cause of Injury



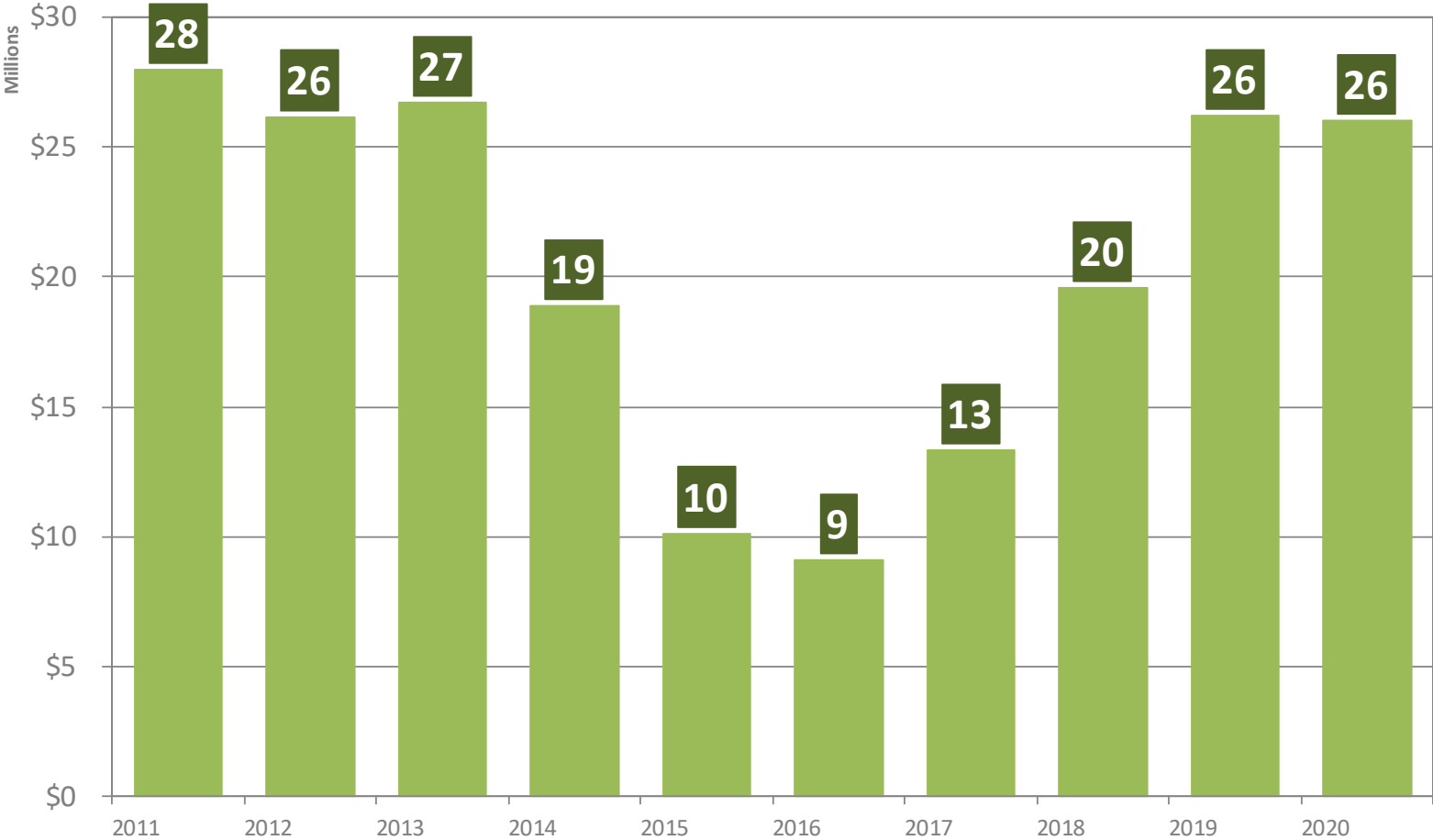
# Workers' Compensation

## Seasonal Injuries Impact of Claims Filed in 2020

❖	287 seasonal employees were hired in 2020 for an average of 702 hours worked per person. In 2019, 405 seasonal employees were hired for an average of 630 hours worked per person/
❖	2 Districts had seasonal employees all year long in 2020. 4 Districts had seasonal employees all year long in 2019.
❖	9 Districts hired no seasonal employees in 2020. In 2019, 5 Districts hired no seasonal employees.
❖	Majority of seasonal employees are hired in May to September 2020. In 2019, majority hired from June to October.
❖	A total of 68 claims were filed: 55 were permanent employees or 81% and 13 were for seasonal employees or 9%
❖	Of \$14,156 paid in temporary disability benefits, \$3,573 was paid to permanent employees and \$10,583 or 75% was paid to seasonal workers
❖	38% of the 13 claims filed by temporary employees were indemnity claims
❖	\$17,250 paid in permanent disability benefits was paid to a permanent employee
❖	One litigated claim was filed by a permanent employee

# LAWCX

## Fiscal Year Net Position History





## CLAIMS SERVICES BY PROGRAM

## RISK CONTROL SERVICES BY PROGRAM

## RISK MANAGEMENT SERVICES BY PROGRAM



# Menu of Services & Partner Programs

*Covering all spectrums of risk since 1979.*

For more information, contact:  
Member Services Department  
916.850.7300  
[Memberservices@prismrisk.gov](mailto:Memberservices@prismrisk.gov)

Program	General Liability 1	General Liability 2	PRISMHealth/ Dental	Medical Malpractice	Property	Primary Workers' Compensation	Excess Workers' Compensation	MR OCIP
Catastrophic Claims Management						◇	◇	
Claims Audits	●	●				●	●	
Claims Index Reporting	●	●				●	●	
Injury Reporting and Triage						◇	◇	
Investigative Services						◇	◇	
Managed Care Consulting						●	◇	
Medical Provider Network						◇	◇	
Medical Transportation & Language Services						◇	◇	
Medicare Reporting						●	◇	
Rehabilitation Care						◇	◇	
Return-to-Work Program						◇	◇	
Structured Settlements	◇	◇				◇	◇	
Subrogation Recovery	◇	◇						
TPA RFP Assistance	●	●				●	●	

Program	General Liability 1	General Liability 2	PRISMHealth/ Dental	Medical Malpractice	Property	Primary Workers' Compensation	Excess Workers' Compensation	MR OCIP
Anonymous Reporting System	◇	◇	◇	◇	◇	◇	◇	◇
Background Check Services	◇	◇	◇	◇	◇	◇	◇	◇
Checkpoint System	◇	◇	◇	◇	◇	◇	◇	◇
CPR Training Resource	◇	◇	◇	◇	◇	◇	◇	◇
Cyber Security Services	◇	◇	◇	◇	◇	◇	◇	◇
Drug & Alcohol Testing Consortium	◇	◇	◇	◇	◇	◇	◇	◇
EPN Program	●	●	●	●	●	●	●	●
Fire Apparatus Inspection & Employee Performance Softwares	◇	◇	◇	◇	◇	◇	◇	◇
Law Enforcement BWC	◇	◇	◇	◇	◇	◇	◇	◇
Law Enforcement Wellness	◇	◇	◇	◇	◇	◇	◇	◇
Physical Abilities Testing	◇	◇	◇	◇	◇	◇	◇	◇
Protective Footwear	◇	◇	◇	◇	◇	◇	◇	◇
Safety Data Sheet (SDS) Management	◇	◇	◇	◇	◇	◇	◇	◇
Safe School Ambassadors	◇	◇	◇	◇	◇	◇	◇	◇
Soft Tissue Injury Prevention	◇	◇	◇	◇	◇	◇	◇	◇
Workforce Management Software	◇	◇	◇	◇	◇	◇	◇	◇
Workplace Wellness	◇	◇	◇	◇	◇	◇	◇	◇

Program	General Liability 1	General Liability 2	PRISMHealth/ Dental	Medical Malpractice	Property	Primary Workers' Compensation	Excess Workers' Compensation	MR OCIP
Actuarial Analyses Subsidy	●	●		● Med Mal 1 members only			●	
of Insurance Management	◇	◇	◇	◇	◇	◇	◇	◇
Crisis Incident Counseling Services						●	●	
Crisis Incident Management Services	□	□	□	□	□	□	□	□
Enterprise Risk Consultants	◇	◇	◇	◇	◇	◇	◇	◇
Legal Advice Services	●	●	●	●	●	●	●	●
Property Schedule Maintenance					●			
Real Property Program Appraisal Services					□			
Risk Management Mentor Program	●	●	●	●	●	●	●	●
Risk Management Practitioner Program	◇	◇	◇	◇	◇	◇	◇	◇
School Liability Handbook	●	●	●	●	●	●	●	●
Strategic Planning Facilitation	◇	◇	◇	◇	◇	◇	◇	◇
Risk Management Subsidy Funds	●	●		●	●	●	●	

SYMBOL/DEFINITION		
● Included	◇ Negotiated Rate	□ Hybrid Prices

PRISM offers a wide array of coverage programs.  
For a complete listing, check out our website below.

REV 11/20

## Claims

GL - General Liability Members only;  
WC - Workers' Compensation Members only

**Catastrophic Claims Management** (WC) - When a catastrophic claim occurs, services are available to allow members access to claims professionals whose expertise is managing the claim.

**Claims Audits** - Contracted independent claims auditors review claims in accordance with PRISM's Claims Standards, helping increase Third Party Administrator (TPA) performance. ●

**Claims Index Reporting** - Members of the General Liability and Workers' Compensation programs have access to PRISM's contracted rates to cover all index reporting and inquiries. ●

**Injury Reporting and Triage Services** (WC) - Round the clock access to a reporting system that provides medical-needs triage at the time of injury ◇

**Investigative Services** (WC) - Full-service investigation services include AOE/COE investigations, surveillance, and background investigations, and SIU/fraud services. ◇

**Managed Care Consulting** (WC) - PRISM members receive preferential rates for optimize managed care programs through restructuring existing programs and, if needed or required, a competitive bid or RFP process. ◇

**Medical Provider Network (MPN)** (WC) - PRISM's proprietary MPN provides employer control over the injured worker's medical care throughout the life of the claim. ◇

**Medical Transportation & Language Services** (WC) - Fully credentialed drivers and interpreters, proprietary referral management software, and a triple ◇

**Medicare Reporting** - Receive Center for Medicare/Medicaid query and reporting services to help aid against the potential penalties assessed for failure to comply with the Medicare Secondary Payer Act. ◇

**Rehabilitation Care** (WC) - Sub-acute & post-acute rehabilitation services for people of all ages with medically complex injuries and illnesses. ◇

**Return-to-Work Program** (WC) - temporary work assignments help employers return employees to work, increasing employee satisfaction and decreasing claim costs. ◇

**Structured Settlements** - PRISM works with several brokers specializing in resolving complicated Workers' Compensation and General Liability claims via annuities by providing expert assistance with structured settlements.

**Subrogation Recovery (GL)** - Recover claims dollars from losses caused by the negligent act of a third-party. ◇

**Third Party Administrator (TPA) RFP Assistance** - PRISM in both the Workers' Compensation and Liability Departments are available to help with drafting and reviewing a Request for Proposal, and interviewing. ●

## Risk Control

**Anonymous Reporting System** ◇ - Contact [Risk Control](#) for information.

**Background Check Services** - Preferred pricing and value-added packages for Employee Background Screening needs of PRISM members. ◇

**Checkpoint System** - Electronically log check-in points with timestamps to provide documented proof of completed routes. Can also be used for safety inspections and patrols in both corrections and non-corrections environments. ◇

**CPR Training Resource** - High quality CPR, First Aid, and AED training that members can conveniently coordinate through a single point of contact. ◇

**Cyber Security Services** - Broad suite of state-of-the-art cyber security services, from the initial Risk Assessment, to Virtual Chief Information Securityulnerability Scans, and Managed Security Services. ◇

**Drug & Alcohol Testing Consortium** - In-network pricing for drug and alcohol tests for Department of Transportation (DOT)/Non-DOT regulated ◇

**Employer Pull Notice (EPN) Program** - Proactively monitor employee driving records using a DMV approved EPN agent with just a few clicks. ●

**Fire Apparatus Inspection Software & Employee Performace Evaluation Software** - Both of these software were created to simplify the day-to- ◇

**Law Enforcement Body-Worn Cameras** - Access to turn-key body-worn cameras, software, and secure, unlimited cloud services and storage, which include everything your agency needs to get up and running. ◇

**Law Enforcement Wellness Program** - Build a Fit-for-Life Wellness Culture emphasizing a Culture First, Individual Second strategy by developing policies and programs to infuse strategic anchors at work. ◇

**Physical Abilities Testing** - Members can test an applicant's ability to bend, push, pull, and carry loads to determine if an applicant can meet the physical demands required for the essential functions of their prospective job. ◇

**Protective Footwear** - Protective, slip-resistant outsoles with patented tread pattern, designed to channel liquids away from the sole. Materials meet the American Society for Testing and Materials (ASTM) F-2413-11 Standard. ◇

**Safety Data Sheet (SDS) Management** - customize and automate SDS libraries across your entire organization and access a comprehensive database of SDS documents to assist in library creation. ◇

**Safe School Ambassadors (SSA)** - Empower natural student leaders with non-violent communication and intervention skills to create safer environments within the school community. ◇

**Soft Tissue Injury Prevention** - Help employees reduce sprains, strains, and repetitive motion injuries, which is a crucial component of an integrated occupational health and safety strategy. ◇

**Workforce Management Software** - Designed for our law enforcement, EMS members, this software lets administrators coordinate schedules and oversee employee hours. ◇

**Workplace Wellness Program** - A comprehensive employee wellness program that infuses 6 strategic anchors throughout the workplace. ◇

## Risk Management

**Actuarial Analyses Subsidy** - An annual actuarial subsidy of up to \$2k helps the cost of actuarial studies for members of the: Excess Workers' Compensation, General Liability 1 & 2, and Medical Malpractice Program 1. ●

**Certificates of Insurance Management** - An online of insurance tracking and management system to obtain and record proper evidence of insurance coverage from each organization with whom the members contract. ◇

**Crisis Incident Counseling (CIC) Services** (WC) - Members have access to CIC Services for employees following an unexpected work-related death of a co-worker at the workplace. ●

**Crisis Incident Management (CIM) Services** - Pre-and post-crisis incident services include webinars, situation assessment, media consulting, communications and message management. PRISM members in the following programs have access to a CIM Policy that will provide up to \$50k in services for an accepted claim: EWC, GL1, GL2, Property and Medical Malpractice. □

**Enterprise Risk Consultants (ERC)** - This vetted group of risk managers, claims, risk control, IT and HR professionals are available to assist members with special assignments or transitions. Each Consultant has undergone a comprehensive application and background check. ◇

**Legal Advice Services** - PRISM's General Counsel, Steve Underwood, Esq. is available for consultation on a variety of legal matters, such as: contracts, Brown Act, Public Records Act, litigated matters, and other general governmental issues. ●

**Property Schedule Maintenance** - Property members access property schedules, vendor tracking, and request of insurance via an online portal called AlliantConnect. ●

**Real Property Program Appraisal Services** - Alliant Insurance Services will provide property appraisal services to members of the Property Program. [See Policy Statement Regarding Appraisal Services.](#) □

**Risk Management Mentor Program (RMMP)** - Provides the opportunity to a Mentor/ Mentee and share knowledge, coaching, and insights in the area of risk management. ●

**Risk Management Practitioner Certificate Program** - A series of 5, one-day in-person training sessions has been developed in partnership with CPS HR Consulting and is designed for risk management assistants, workers' compensation specialists, and human resource ◇

**School Liability Handbook: Student Activities & Employment Issues** - A comprehensive handbook including 5 modules: 1: School Activities and the Law, 2. Protecting and Supervising Students, 3. Additional Risk Management Concerns, 4. Employment Issues for School Districts, and 5. Forms and Templates; created in coordination with Lozano Smith. ●

**Strategic Planning Facilitation Services** - PRISM staff can conduct a JPA's Strategic Planning Session, providing guidance and consultation before, during and after your session. ◇

**Risk Management Subsidy** - Voluntary subsidy for PRISM members who participate in a major program. Funds can be used for any expense related to the areas of Risk Control and Risk Management (such as PRISM Partner Programs), except for payment of premiums.

## Training & Resources

**Classroom, On-site, & Regional Training Opportunities** - Instructor-led training in a variety of formats, including classroom-style, on-site, and regional seminars held state-wide on various risk management topics. ●

**Communication Resources** - Valuable information to keep you informed and aid you in making important risk management decisions for your organization. ●

- [Blog](#)
- [COVID-19](#)
- [ELink](#)
- [Education Connection](#)
- [News](#)
- [Risk Control Trainings](#)
- [Member Message Board](#)

**Contract Review Services** - by Alliant Insurance Services in conjunction with the Insurance Requirements in Contracts (IRIC) Manual to assist members with questions related to professional service providers, tenants, contractors and vendor contracts. ●

**EAGLE Awards** - (Exemplary Achievement in Government Leadership and Enrichment) Awards Program recognizes members for excellence in risk management, promoting an atmosphere to encourage members to strive for excellence and innovation. ●

**Labor Law/Employment Practices Services** - Legal consultation provided by the Eyres Law Group on a variety of topics including; the interactive process, performance management, and reasonable accommodations. ●

**Learning Management System (LMS)** - An online LMS (TargetSolutions) is available through our partnership with Vector Solutions, which allows members access to an extensive catalog of web based training sessions for risk management as well as everyday business needs such as Microsoft Suite products. ●

**PRISMtv** - Member-exclusive, 24/7 access to hundreds of webcasts and training on-demand. Webcasts available in 7 different channels: ●

- [Educators](#)
- [EPL & Liability](#)
- [Health & Benefits](#)
- [News & Administration](#)
- [Risk Control](#)
- [Risk Management](#)
- [Workers' Compensation](#)

**Risk Assessment Tool** - The online self-assessment gaps in risk management and provides reports with links to PRISM online resources. ●

**Risk Control Open Forum** - A roundtable environment for members responsible for risk control or health and safety. Join us for the local

and safety issues. ●

**Streaming Library** - Online repository of safety and training videos. ●

**Toolbox** - A compendium of resources developed for members, and covers over 100+ areas of risk management, including: ●

- [Best Practices Library](#)
- [Drug & Alcohol Clearinghouse Guide](#)
- [Employment Practices Manuals\\*](#)
- [Essential Job Duties\\*](#)
- [Job Safety Analyses\\*](#)
- [Risk Simplified](#)
- [Safety Talks: A Tailgate/ Toolbox Resource\\*](#) (nearly 300 topics)
- [School Administrator's Guide to Preventing Sexual Abuse & Misconduct\\*](#) (NEW)
- [School Liability Handbook: Student Activities & Employment Issues\\*](#) (UPDATED)
- [Utilizing GIS for Road Maintenance](#)

\* - A password is required to access this resource. Please contact the [Risk Control Department](#) for assistance.

SYMBOL/DEFINITION		
● Included	◇ Negotiated Rate	□ Hybrid Prices

Agenda Item 4.B.

**POOLED WORKERS' COMPENSATION PROGRAM**

**SUBJECT: Presentation by Acclamation Insurance Management Services (AIMS) of Medical Provider Network and Nurse Triage Programs**

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**BACKGROUND AND STATUS:**

The current five-year agreement with Acclamation Insurance Management Services (AIMS) for third party workers' compensation claims administration services expires on July 1, 2021. In October 2020, the Board of Directors approved another five-year agreement with AIMS with no-fee-increase. Under the new agreement, AIMS is including a 24/7 call center for nurse triage and injury reporting services and a Medical Provider Network (MPN) for no additional fee. Both services will be effective July 1, 2021.

The nurse triage and injury reporting services provide an avenue for employees to report a workplace injury and obtain advice regarding self-care and/or a treatment referral. Supervisors can also submit information through the service. Information obtained through the nurse triage service is immediately uploaded to AIMS and the district. The MPN provides a network of treating physicians and hospitals. Through a call center, users can be directed to utilize telemedicine resources for quick medical attention for those in remote areas. It should also cut down on time employees spend away from work to attend appointments.

Representatives from AIMS will give a presentation regarding these value-added services.

**REFERENCE MATERIALS ATTACHED:**

- AMC Call Connect and AMC Medical Provider Network Presentation

A background image of a call center with several nurses wearing headsets. The focus is on a young woman in the foreground who is smiling and looking towards the camera. Other nurses are visible in the background, slightly out of focus.

# AMC Call Connect

---

**24/7 Nurse Triage &  
Injury Reporting  
Services**



Employee or Supervisor  
Call the 24/7

Life Threatening Emergency? Call 911  
• Call the CareLine after emergency  
Care has been approved



Employee demographics, incidents details and injury  
photo obtained



CareNurse triage provided  
via medical algorithms

Self Care Advice  
Referred for Treatment  
• VideoDoc (Optional)  
• Treating Facility



Treating facility notified and authorization faxed



CareReport distributed to company stakeholders  
(HR, Managers, Safety, Claims, etc.)



# AMC CallConnect Workflow How does it work?



# Disposition Determination

- Nurse triage's employees' symptoms over the phone to determine if treatment is needed
- Uses nationally recognized medical decision tree –reduces employer's liability/legal exposure
  - Self Care Advice
  - VideoDoc Visit (*Optional*)
  - Seek Treatment at Clinic
  - Seek Treatment at ED

**Concentra<sup>+</sup> Telemed**

First Name MI Last Name

Email

Confirm Email

Password

I agree to these [Terms of Use](#).

**Sign Up**

Already have an account? [Log In](#)

Your direct link to quality workplace health

Injured on the job? Talk to an experienced occupational health physician right now with Concentra Telemed.

With Concentra Telemed, you can get treatment right away - little to no waiting or interruptions. Just log on and connect to quality care in no time.

[Learn More >](#)

# Program Overview



Available  
24/7/365



Reporting eliminates need for  
5020 creation by Employer &  
reduces any lag time in  
notifications of injury to all  
parties involved



Call times average  
14 minutes



Provides a reasonable and  
neutral avenue for  
employees to report a  
workplace injury &  
immediately uploads to  
AIMS



All calls are recorded and kept  
for a minimum of 2 years.  
Recorded statement of body  
parts injured & mechanism of  
injury. Transcripts available.



Greater satisfaction  
experience by the injured  
employee promoting  
improved workplace morale.

# AMC CallConnect Highlights



Bilingual Staff-Native Spanish Speaking



Self Care Advice sent via text and/or email to the injured employee




Treating Facility Info sent via text and/or email to the injured employee



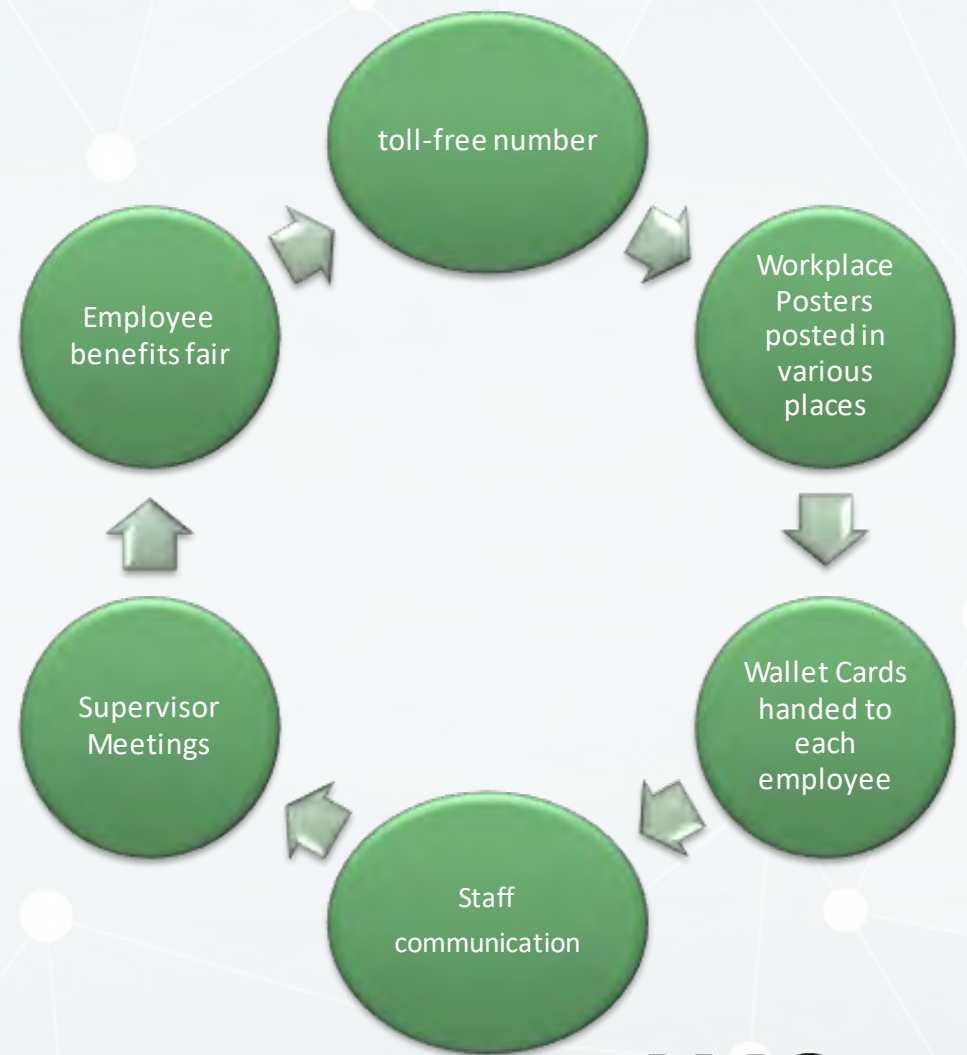
Photos of injury obtained when available





## Effective program rollout is the key to success

We are able to attend supervising trainings,  
employee benefits fairs, safety exhibits



# **AMC** Medical Provider Network (MPN)

**Medical Network of  
Treating Physicians  
& Hospitals**



# AMC MPN Highlights



Medical Access Assistant (MAA)  
available Monday – Saturday (7 am – 8  
pm)



Telemedicine noted by Specialty



Medical Control for Life of Claim  
(Pre-Designation still permitted)



Effective immediately upon filing  
with the State – no wait time  
involved

# Roll Out



Employer posts information (notice) about MPN Access via DWC-7



Employer Notice includes Medical Access Assistant Information



At time of hire – information about MPN Provided with Pre-designation information



At time of Injury – AIMS provides MPN information to injured employee to insure network utilized



MPN Providers validated annually for accepting new patients



Complaints reviewed by AMC Medical Director





STATE OF CALIFORNIA - DEPARTMENT OF INDUSTRIAL RELATIONS  
Division of Workers' Compensation

# DWC-7 Notice

## Notice to Employees--Injuries Caused By Work

You may be entitled to workers' compensation benefits if you are injured or become ill because of your job. Workers' compensation covers most work-related physical or mental injuries and illnesses. An injury or illness can be caused by one event (such as hurting your back in a fall) or by repeated exposures (such as hurting your wrist from doing the same motion over and over).

**Benefits.** Workers' compensation benefits include:

- **Medical Care:** Doctor visits, hospital services, physical therapy, lab tests, x-rays, medicines, medical equipment and travel costs that are reasonably necessary to treat your injury. You should never see a bill. There are limits on chiropractic, physical therapy and occupational therapy visits.
- **Temporary Disability (TD) Benefits:** Payments if you lose wages while recovering. For most injuries, TD benefits may not be paid for more than 104 weeks within five years from the date of injury.
- **Permanent Disability (PD) Benefits:** Payments if you do not recover completely and your injury causes a permanent loss of physical or mental function that a doctor can measure.
- **Supplemental Job Displacement Benefit:** A nontransferable voucher, if you are injured on or after 1/1/2004, your injury causes permanent disability, and your employer does not offer you regular, modified, or alternative work.
- **Death Benefits:** Paid to your dependents if you die from a work-related injury or illness.

**Naming Your Own Physician Before Injury or Illness (Predesignation).** You may be able to choose the doctor who will treat you for a job injury or illness. If eligible, you must tell your employer, in writing, the name and address of your personal physician or medical group *before* you are injured. You must obtain their agreement to treat you for your work injury. For instructions, see the written information about workers' compensation that your employer is required to give to new employees.

**If You Get Hurt:**

1. **Get Medical Care.** If you need emergency care, call 911 for help immediately from the hospital, ambulance, fire department or police department. If you need first aid, contact your employer.
2. **Report Your Injury.** Report the injury immediately to your supervisor or to an employer representative. Don't delay. There are time limits. If you wait too long, you may lose your right to benefits. Your employer is required to provide you with a claim form within one working day after learning about your injury. Within one working day after you file a claim form, your employer or claims administrator **must** authorize the provision of all treatment, up to ten thousand dollars, consistent with the applicable treatment guidelines, for your alleged injury until the claim is accepted or rejected.
3. **See Your Primary Treating Physician (PTP).** This is the doctor with overall responsibility for treating your injury or illness.
  - If you predesignated your personal physician or a medical group, you may see your personal physician or the medical group after you are injured.
  - If your employer is using a medical provider network (MPN) or a health care organization (HCO), in most cases you will be treated within the MPN or HCO unless you predesignated a personal physician or medical group. An MPN is a group of physicians and health care providers who provide treatment to workers injured on the job. You should receive information from your employer if you are covered by an HCO or a MPN. Contact your employer for more information.
  - If your employer is not using an MPN or HCO, in most cases the claims administrator can choose the doctor who first treats you when you are injured, unless you predesignated a personal physician or medical group.
4. **Medical Provider Networks.** Your employer may be using an MPN, which is a group of health care providers designated to provide treatment to workers injured on the job. If you have predesignated a personal physician or medical group prior to your work injury, then you may go there to receive treatment from your predesignated doctor. If you are treating with a non-MPN doctor for an existing injury, you may be required to change to a doctor within the MPN. For more information, see the MPN contact information below:

MPN website: \_\_\_\_\_

MPN Effective Date: \_\_\_\_\_ MPN Identification number: \_\_\_\_\_

If you need help locating an MPN physician, call your MPN access assistant at: \_\_\_\_\_ **67**

If you have questions about the MPN or want to file a complaint against the MPN, call the MPN Contact Person at: \_\_\_\_\_



**Questions?**

AMS & AMC Thanks You  
for your  
Continued Partnership!

**POOLED LIABILITY PROGRAM**

**SUBJECT: General Overview of Program Structure, Review of Financial Position, and Claims Overview**

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**BACKGROUND AND STATUS:**

The Pooled Liability Program provides liability coverage up to \$29 million per occurrence. The Program consists of the following components:

**Primary Pool:**

**Risk Sharing (Pooling) Layer:**

Each member has selected a \$1,000, \$2,500, \$5,000, \$10,000, \$25,000, \$50,000, or \$75,000 retained limit. Coverage excess of the individual member retained limit up to \$200,000 is risk shared (pooled) among the members. Through the same process as the workers' compensation program, the VCJPA pays first dollar coverage and program years are retrospectively adjusted four years after the end of a program year until the program year is closed.

**Mid-Layer:**

A Mid-Layer Pool provides coverage between \$200,001 and \$1 million. The Mid-Layer Pool is a mandatory component which is accounted for separately from the other layers. The purpose of the Mid-Layer Pool is to reduce the impact of severe claims. To build equity in the Program, which had historically been funded by periodic member contributions, the Board approved an allocation to the mid-layer pool from the retrospective adjustment refund approved in November 2018. In addition, as of July 1, 2019, the Board approved a five-year plan to build equity in the mid-layer pool by retaining 50% of any retrospective adjustment refunds declared. The plan is reviewed annually.

**Aggregate Pool:**

The Program also has an aggregate pool to protect the districts from frequent losses. The Board approved a five-year plan effective July 1, 2019, to fund the Aggregate Pool by annually collecting a cumulative \$10,000 from the member districts through the annual budget. The Aggregate Pool sets a limit, currently two times a district's deposit premium, beyond which no further losses of a program year may be charged to any one district. Should the amount of a claim exceed a member district's aggregate limit, the remaining amount of the claim is spread among all of the member districts.

Both the Mid-Layer and Aggregate Pools are non-equity, so the funds are not allocated to individual member districts. If a member withdraws from the VCJPA, they leave behind all rights to the funds. The VCJPA Board can declare distributions from the funds to the current members of the Program.

**Agenda Item 5.A., Page 2**

**Excess Coverage:**

Coverage above \$1 million to \$29 million is obtained through the California Affiliated Risk Management Authorities (CARMA), a risk sharing joint powers authority. CARMA risk shares the \$1 million to \$4 million layer among its members, has a mid-layer pool covering the \$4 million to \$5 million layer which was funded through equity, and group purchases coverage above \$5 million through Great American Insurance Company. Effective July 1, 2020, CARMA approved a two-tiered rating structure for the risk sharing layer, with separate rates for municipal and non-municipal members.

**Employment Practices Liability Coverage:**

The Program also provides optional employment practices liability coverage as follows:

*In VCJPA Primary Pool:*

The primary pool covers the first \$25,000 per occurrence less each member's retained limit.

*Membership in the Employment Risk Management Authority (ERMA)*

Coverage above \$25,000 per occurrence is provided through the Employment Risk Management Authority (ERMA), a risk sharing joint powers authority. ERMA provides coverage through a combination of risk sharing and group purchased coverage. Coverage above a member's self-insured retention to \$1 million is risk shared among the ERMA members and coverage with limits of \$2 million each claim, each member; a \$4 million aggregate each member, and a \$10 million policy aggregate is group purchased by some of the ERMA members, including VCJPA.

In addition to providing employment practices liability coverage, ERMA provides its members with employment practices-related trainings and resources, which are outlined on the attached document.

Truc Dever and Jamie Scott currently serve on the ERMA Board representing the VCJPA, with Ms. Dever serving as ERMA Vice President.

Three of VCJPA's member districts, Coalinga-Huron Mosquito Abatement District; Northern Salinas Valley Mosquito Abatement District; and Pine Grove Mosquito Abatement District, have opted out of the employment practices liability coverage.

Staff will review the Program, including the results of the equity building in the Mid-Layer and Aggregate Pools to-date. Mr. Will Portello, Litigation Manager, will also provide a claims and litigation update.

**REFERENCE MATERIALS ATTACHED:**

- Pooled Liability Program – Charts and Graphs:
  - Liability Program Coverage Outline
  - Liability Program Pool Funds
  - Estimated Ultimate Losses
  - Ultimate Loss Components



**Agenda Item 5.A., page 3**

- Net Position by Fiscal Year
- Net Position of the Mid-Layer
- Liability Program Combining Financial Statements as of June 30, 2020
- Target Equity Ratios
- CARMA Net Position as of June 30, 2020
- ERMA Net Position as of June 30, 2020
- Pooled Liability Program Litigation Manager's Report:
  - All Liability Claims 2015-2020
  - Five-Year Trends

# Liability Coverage

**GREAT AMERICAN EXCESS AND SURPLUS COMPANY  
GROUP PURCHASED THROUGH CARMA**

**\$5M to \$29M**

**CARMA POOLED LAYER**

**\$1M to \$5M**

**VCJPA MID-LAYER POOL**

**\$200,000 to \$1M**

**VCJPA PRIMARY POOL**

**RETAINED LIMIT to \$200,000**

**MEMBER RETAINED LIMIT**

**VARIES BY MEMBER ELECTION:**

**\$1,000 \$2,500 \$5,000 \$10,000 \$25,000 \$50,000 \$75,000**

# Liability Program

The retrospective adjustment formula:

ACTIVITY	METHOD OF ALLOCATION TO MEMBER
+ DEPOSIT PREMIUM	ACTUAL AMOUNT PAID
+ INTEREST	DEPOSIT PREMIUM
- LOSSES WITHIN RETAINED LIMIT (PAID + CASE RESERVES)	MEMBER SPECIFIC
- POOLED LOSSES INCURRED (PAID + CASE RESERVES)	PAYROLL
- AGGREGATE STOP LOSS	RETAINED LIMIT
- IBNR (ACTUARIALLY DETERMINED LIABILITY)	DEPOSIT PREMIUM
- EXCESS INSURANCE COST (ACTUAL)	PAYROLL
- ADMINISTRATIVE COSTS (ACTUAL)	DEPOSIT PREMIUM
= MEMBER EQUITY (SURPLUS OR DEFICIT)	

# Liability Pool Funds


## Primary Layer

- **Funded annually based on actuarial study**
- **Most claims occur at this level**
- **Each policy year stands alone, evaluated via annual report**
- **Net Position at 6/30/2020 = \$281K**

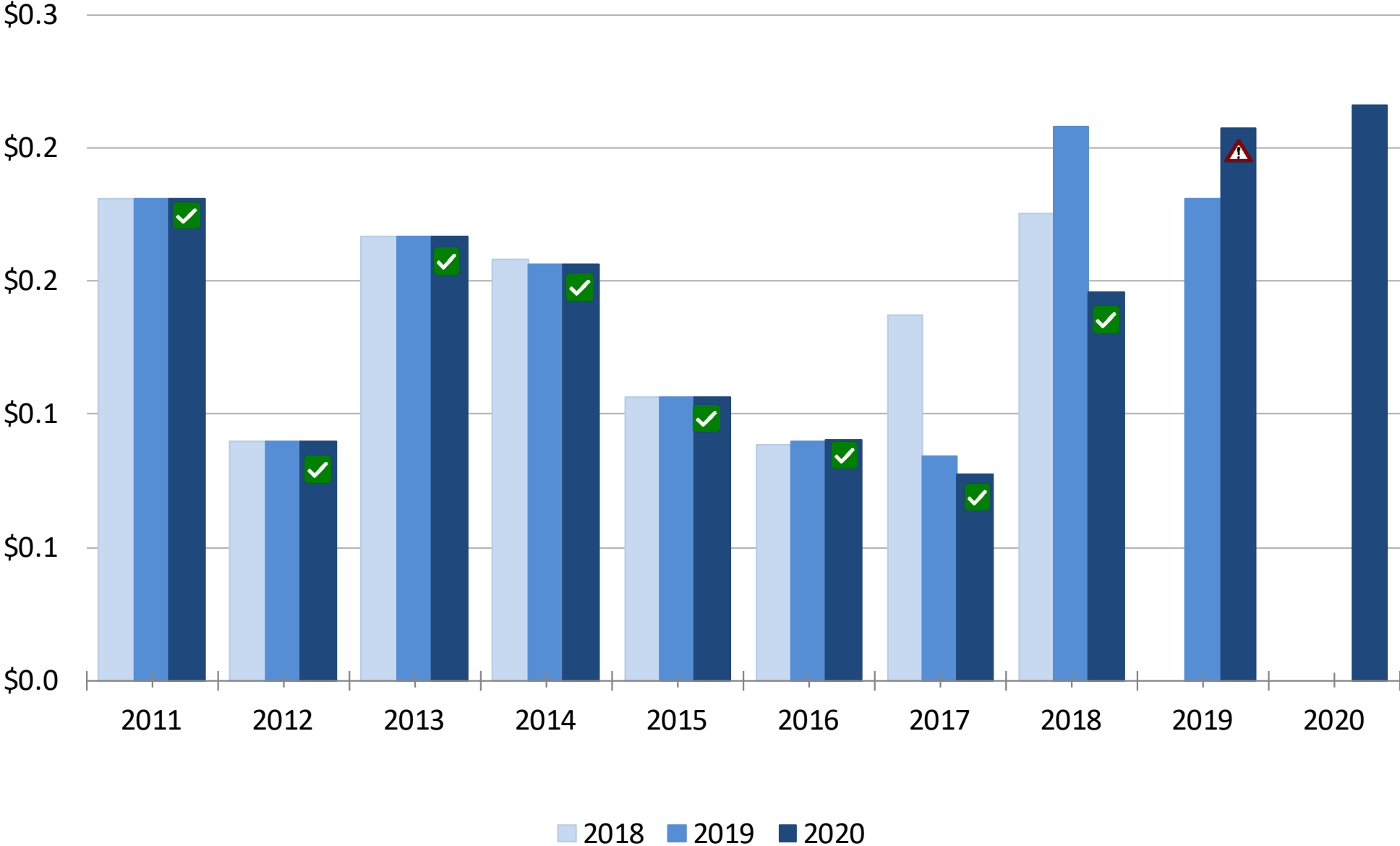
## Aggregate Pool

- **Funded by member contributions in early 1990's**
- **Protects against frequency**
- **Aggregate stop-loss = 2 times Retained Limit**
- **Net Position at 6/30/2020 = \$251K**

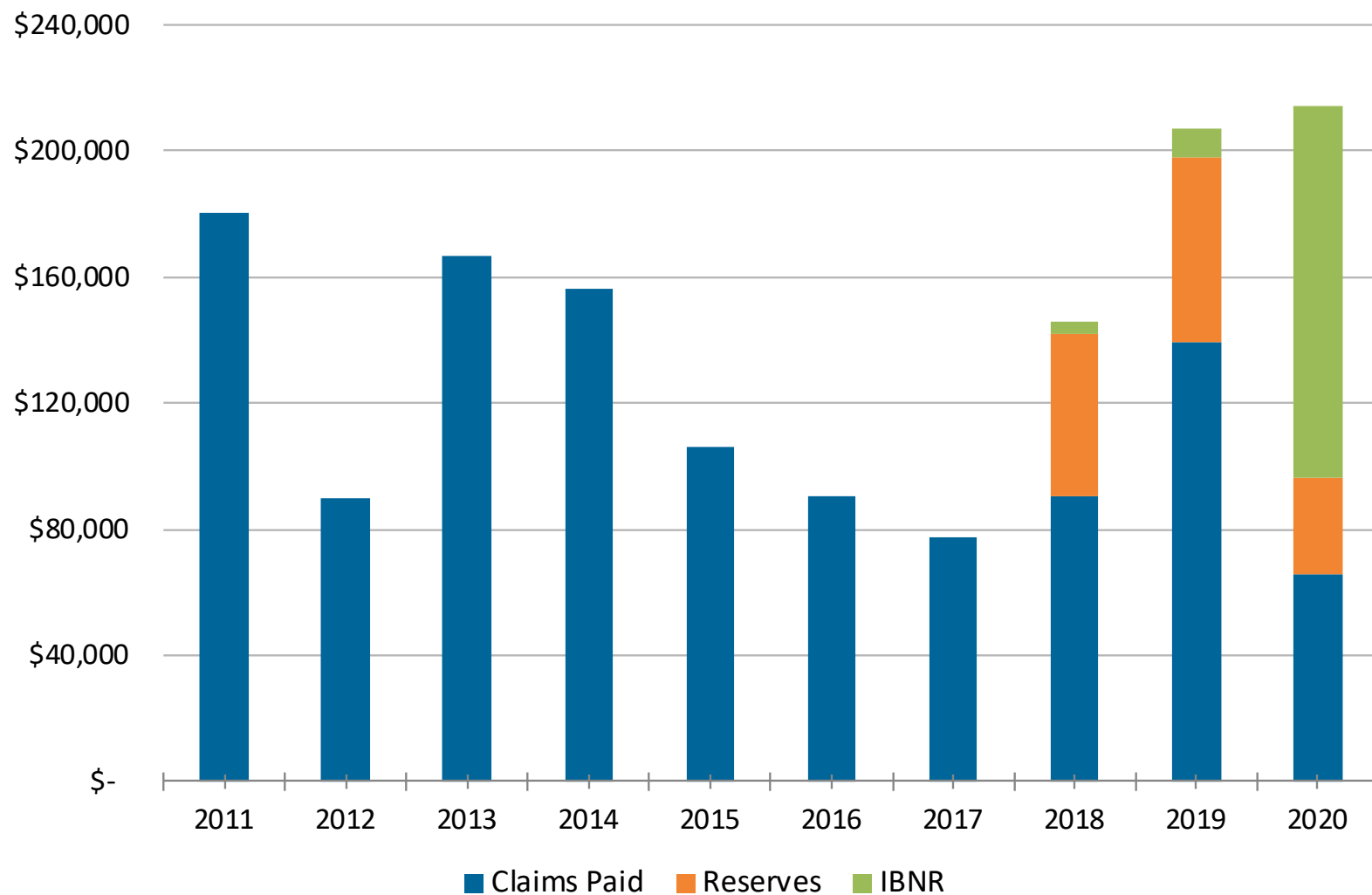
## Mid-Layer Pool

- **Protects against severity (\$200k to \$1 million layer)**
- **Net Position at 6/30/2020 = \$2.5M (3.1 x full \$800k hits)**
- **Improved from 2.75 times as of 6/30/2019** 

# Estimated Ultimate Loss Current vs. Prior Estimates



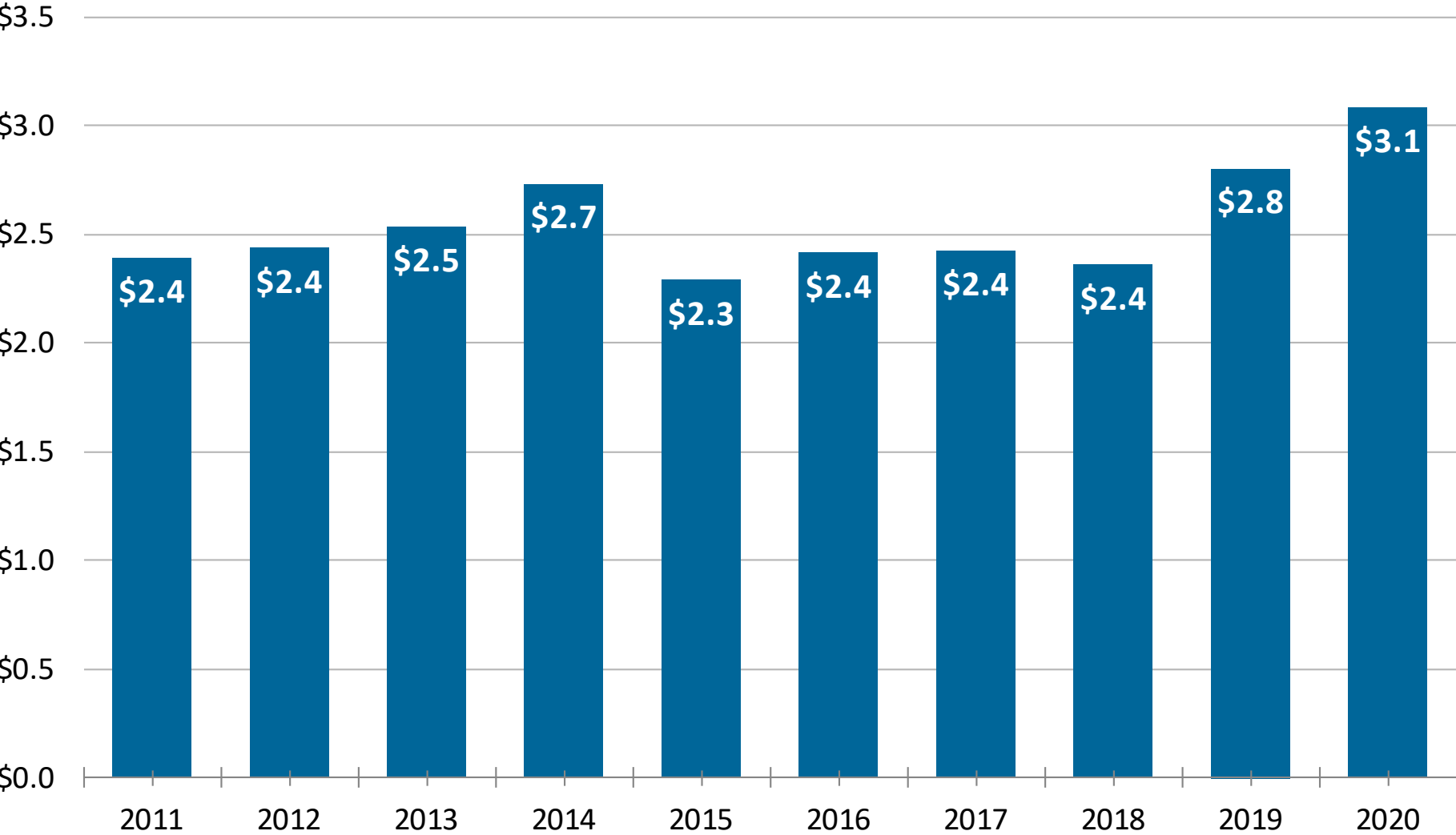
# Ultimate Loss Components As of June 30, 2020



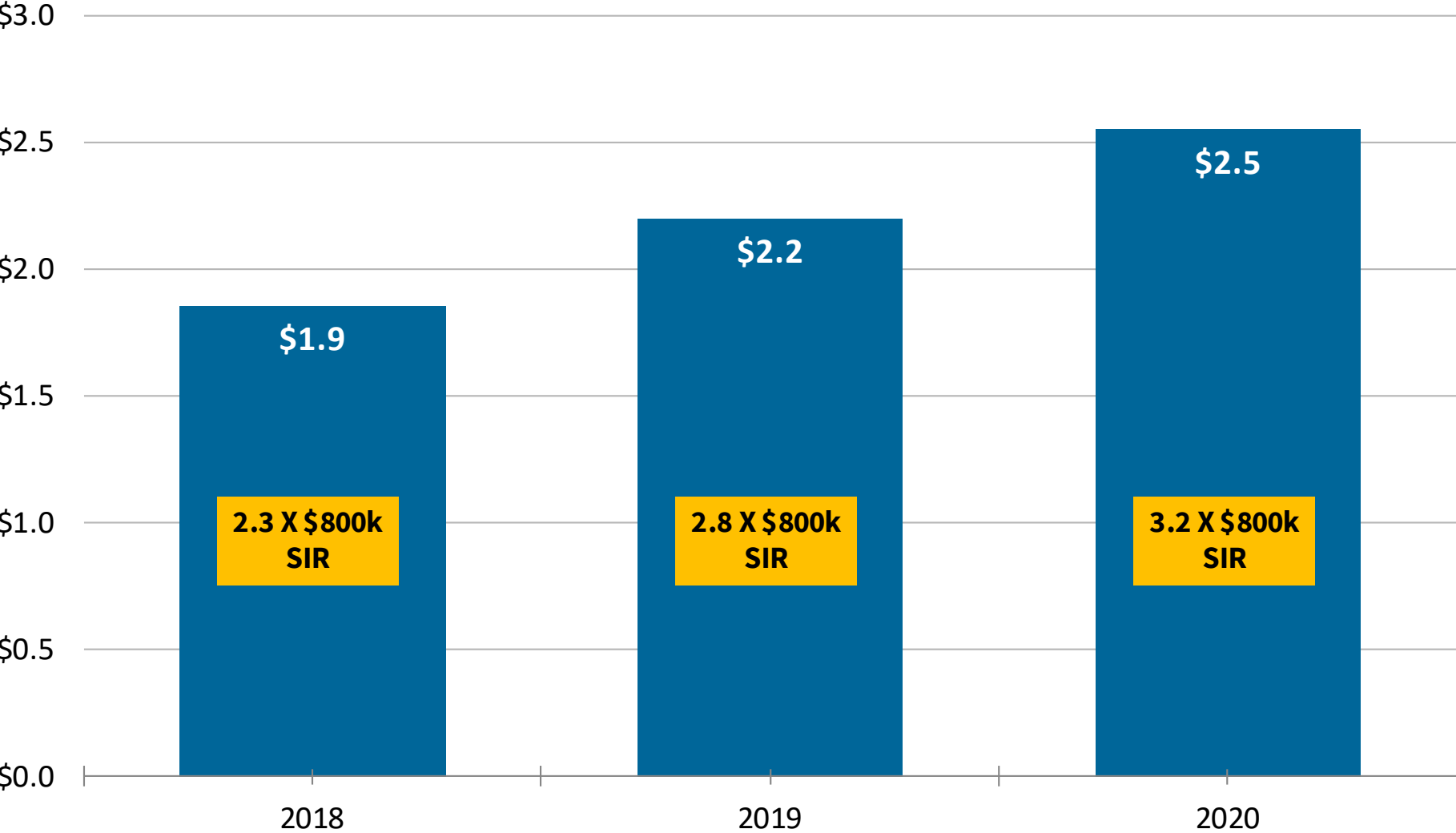
**POOLED LIABILITY PROGRAM OVERVIEW**

# **Net Position by Fiscal Year**

## **Pooled Funds, In Millions**



# Net Position of the Mid-Layer





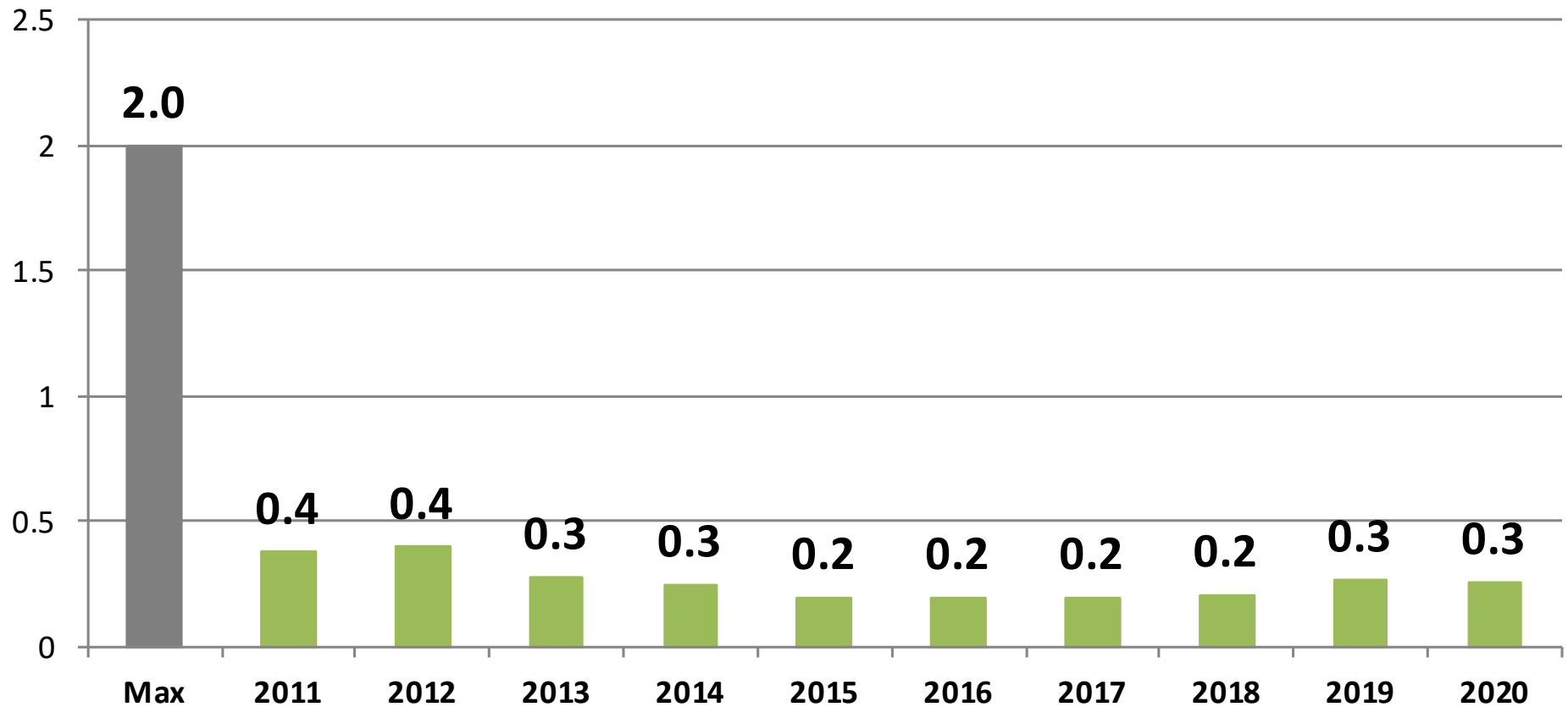
POOLED LIABILITY PROGRAM OVERVIEW

# Liability Financial Statements Combining at June 30, 2020

	Primary	Aggregate	Mid-Layer	Total
<b>Total Assets</b>	<b>\$ 1,420,783</b>	<b>\$ 250,749</b>	<b>\$ 2,615,536</b>	<b>\$ 4,287,068</b>
Claim Liabilities	270,532		67,000	337,532
Retrospective Adjustmer Assessment Payable	868,894 -			868,894
<b>Total Liabilities</b>	<b>1,139,426</b>	<b>-</b>	<b>67,000</b>	<b>1,206,426</b>
<b>Net Net Position</b>	<b>\$ 281,357</b>	<b>\$ 250,749</b>	<b>\$ 2,548,536</b>	<b>\$ 3,080,642</b>
Member Contriubutions	<b>\$ 1,485,663</b>	<b>\$ 10,000</b>	<b>\$ 215,568</b>	<b>\$ 1,711,231</b>
Investment Income	153,084	13,740	201,063	367,887
Claims Expense	(171,367)	(2,237)	(8,000)	(181,604)
Retrospective Refunds	(509,416)			(509,416)
Insurance	(913,240)			(913,240)
Distributions			(60,648)	(17,568)
Administration	(178,543)			(178,543)
<b>Net Income (Loss)</b>	<b>\$ (133,819)</b>	<b>\$ 21,503</b>	<b>\$ 347,983</b>	<b>\$ 278,747</b>

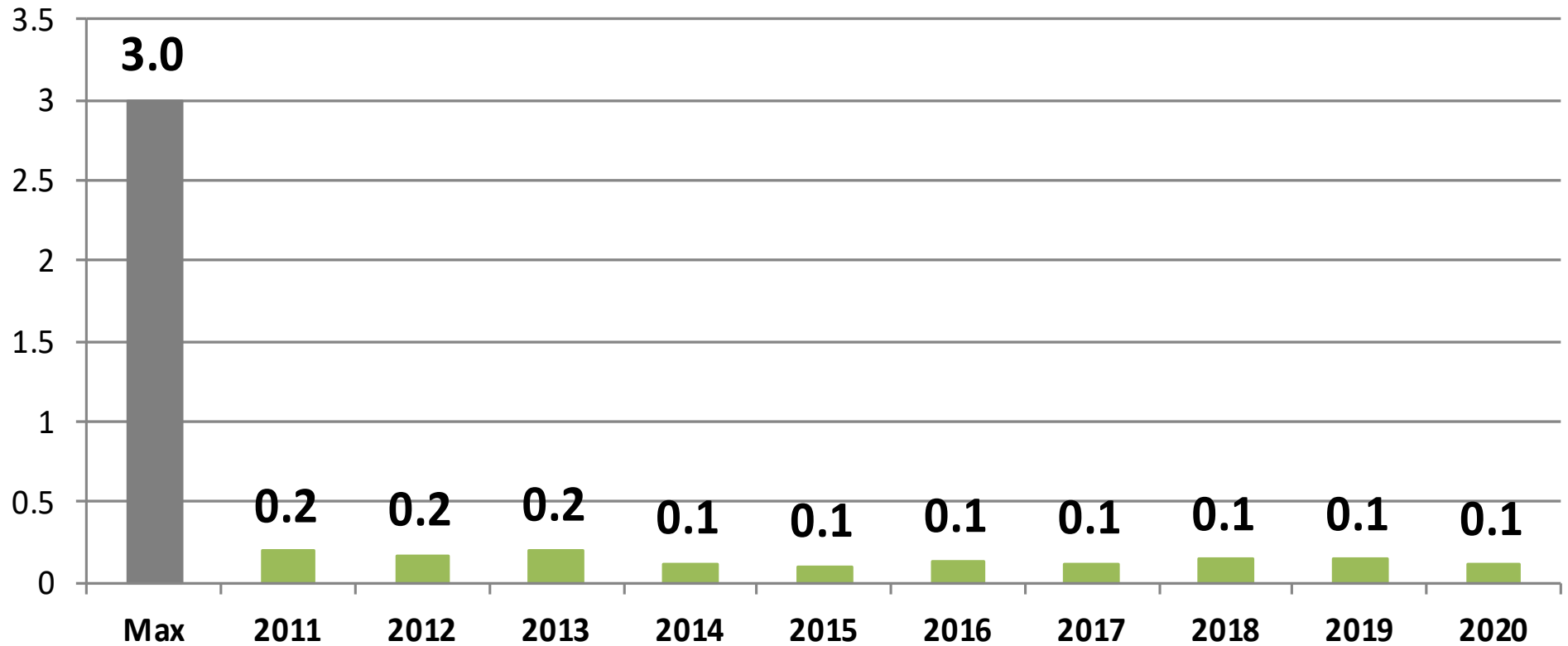
# Target Equity Ratios - Liability Program

## Ratio A: Net Contribution to Equity



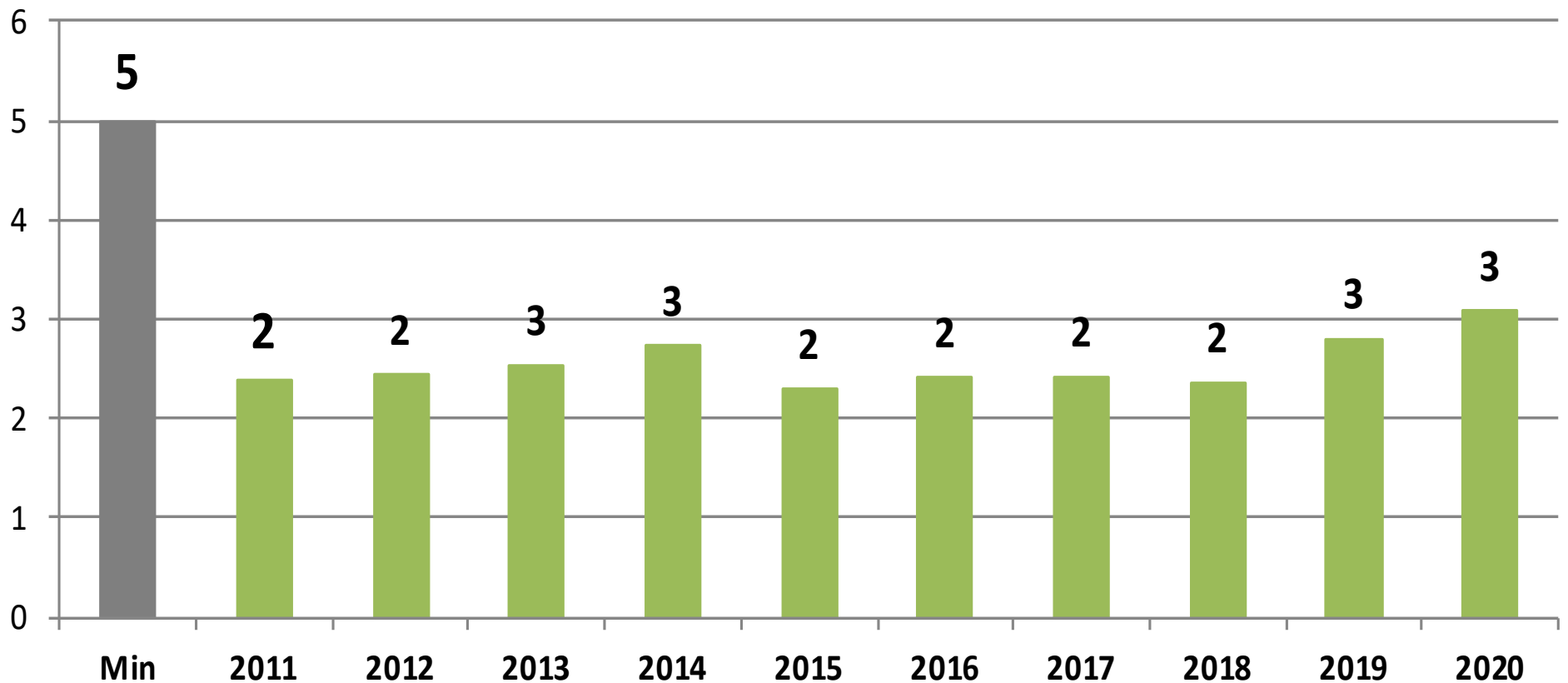
# Target Equity Ratios - Liability Program

## Ratio B: Net Loss Reserves to Equity



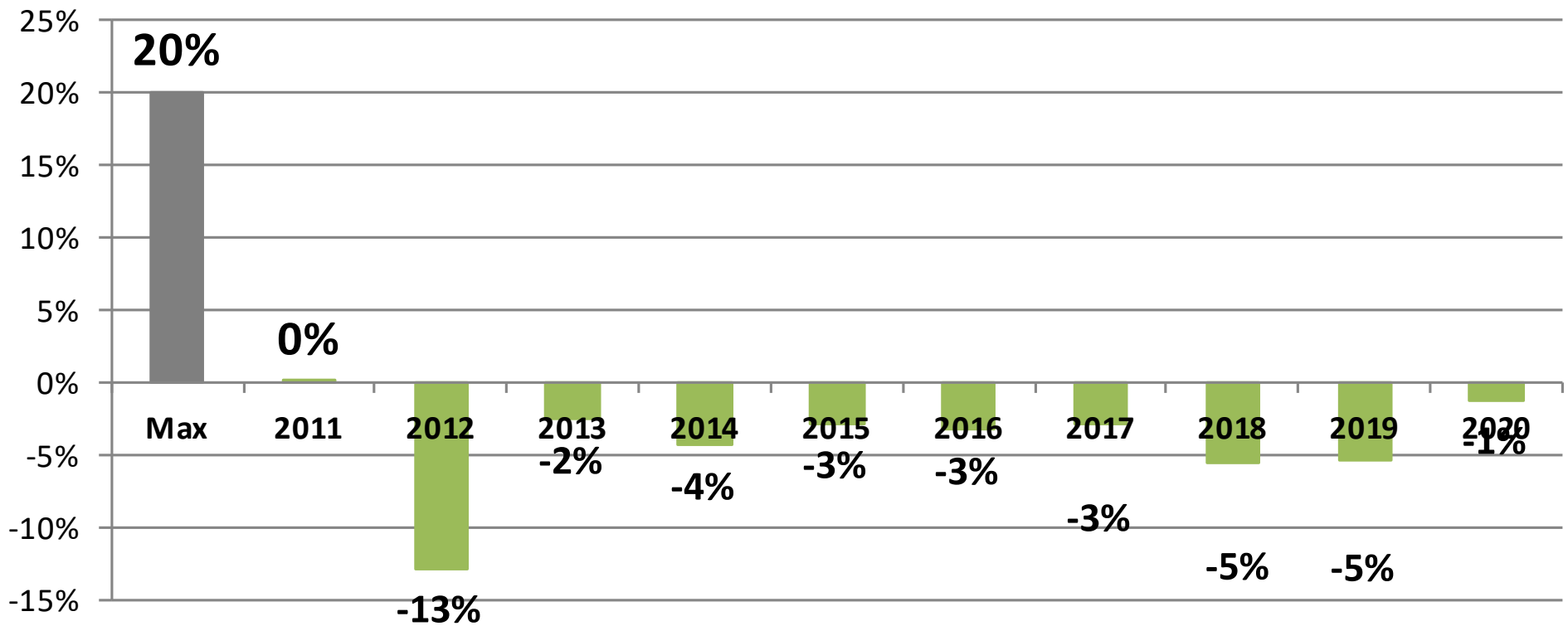
# Target Equity Ratios - Liability Program

## Ratio C: Equity to Self-Insured Retention



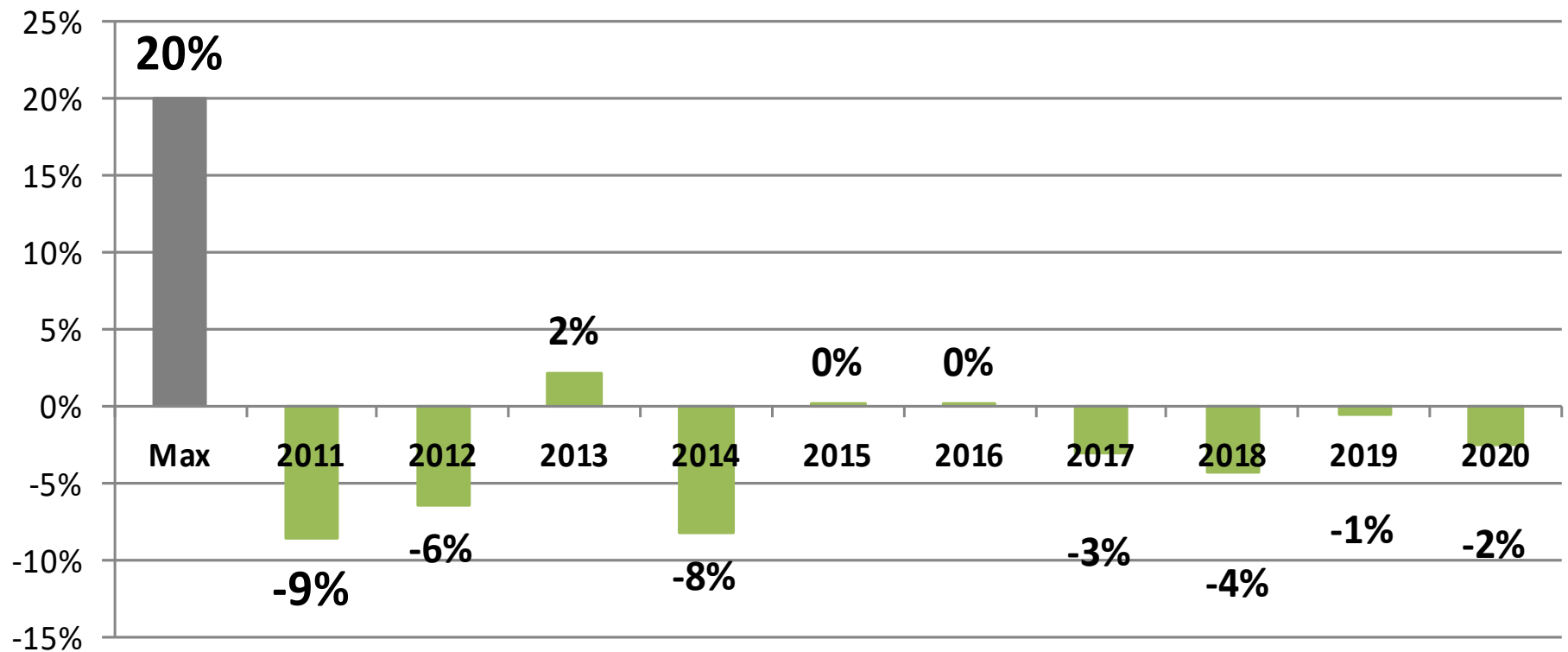
# Target Equity Ratios - Liability Program

## Ratio D: One-Year Reserve Development



# Target Equity Ratios - Liability Program

## Ratio E: Two-Year Reserve Development

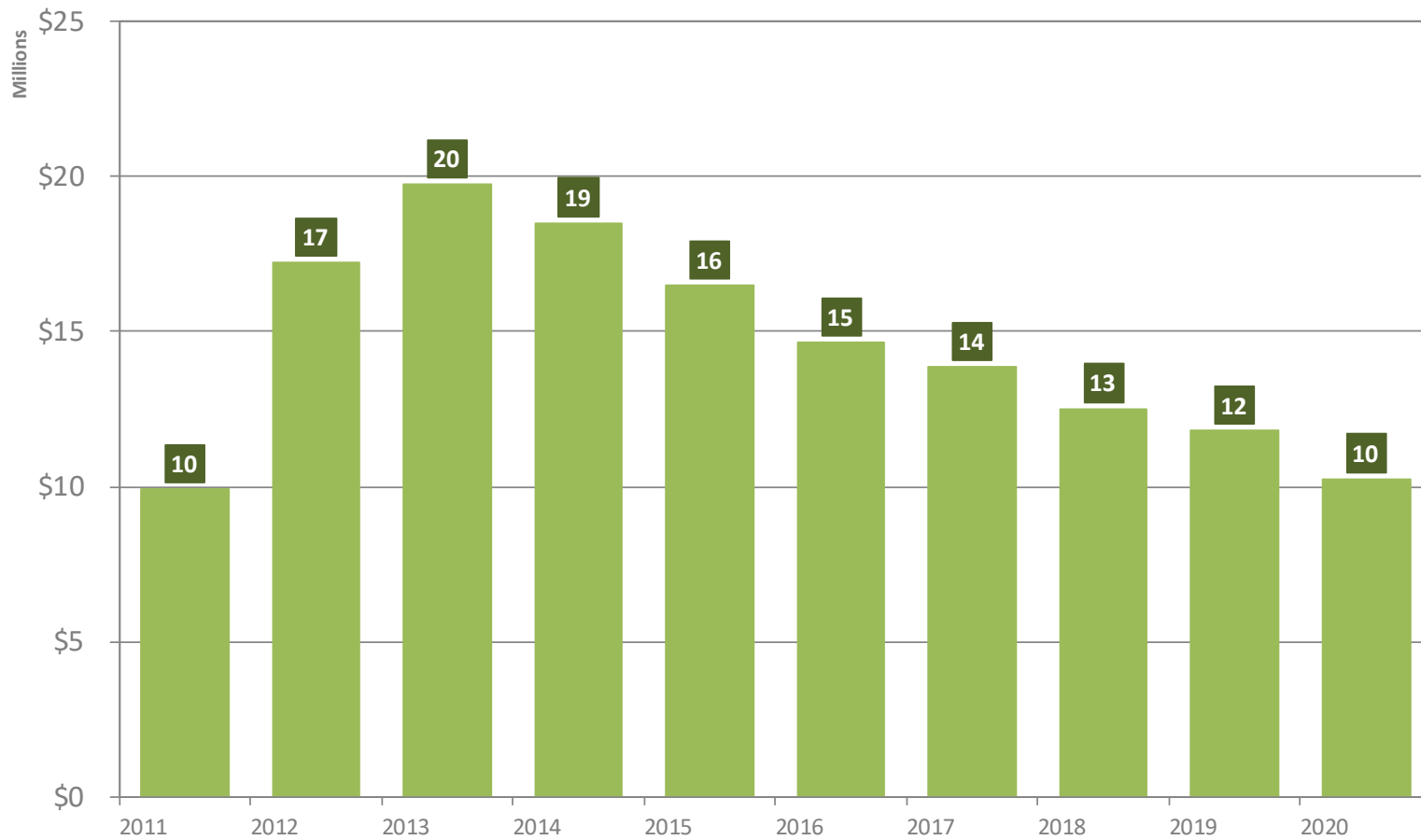


## CARMA AUDITED FISCAL YEAR NET POSITION



# ERMA

## Fiscal Year Net Position History

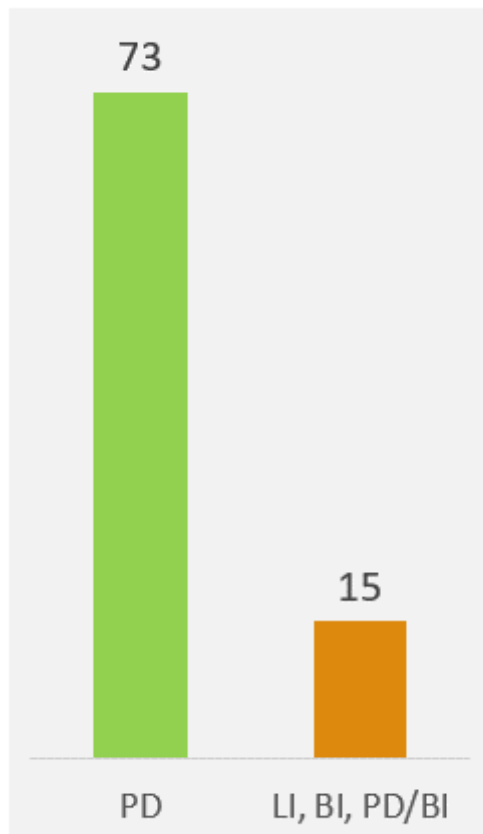


*\*2021 as of Dec. 31, 2020*

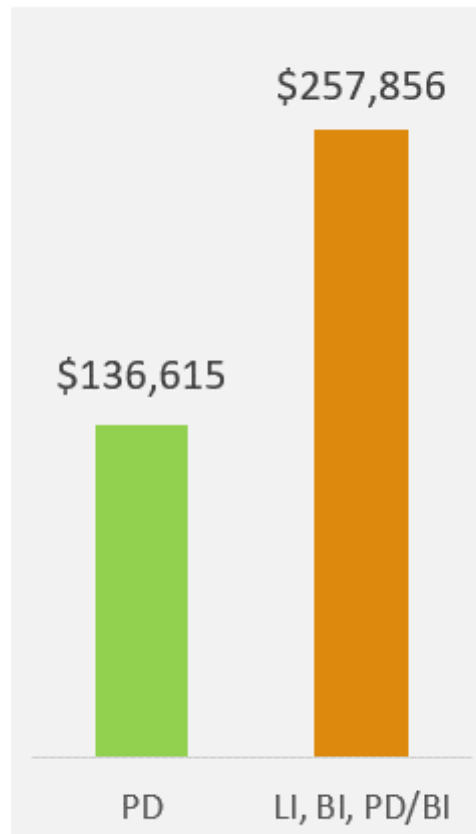


# — All Liability Claims 2015-2020

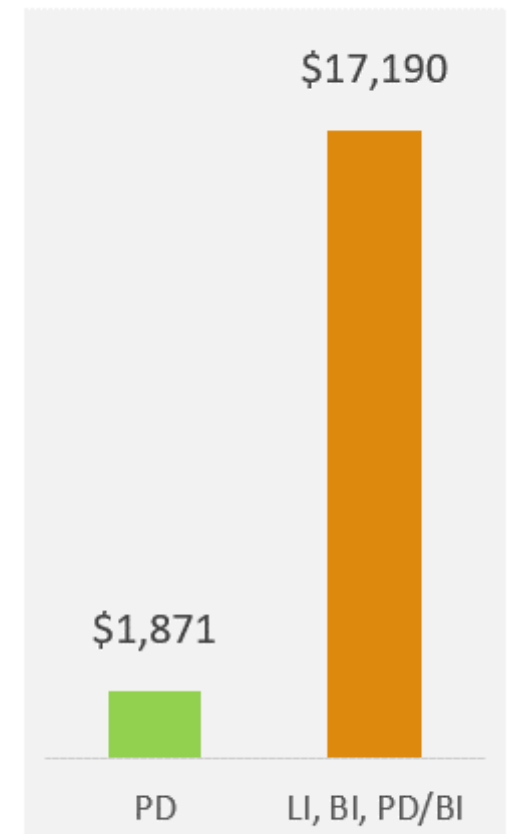
NUMBER OF CLAIMS



TOTAL DOLLARS INCURRED

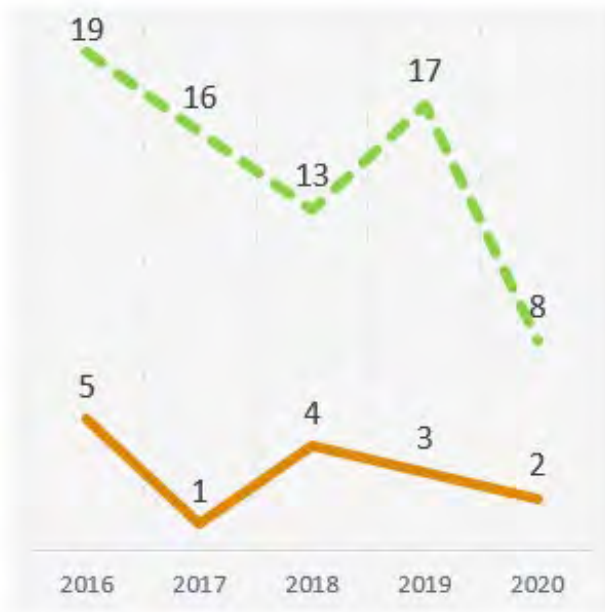


AVERAGE INCURRED PER CASE



# — Five-Year Trends

NUMBER OF CLAIMS



TOTAL DOLLARS INCURRED



AVERAGE DOLLARS INCURRED



■ Litigated ■ Non-Litigated



# Orange County Mosquito and Vector Control District

*A Public Health Agency Serving Orange County Since 1947*

## Conference and Meeting Report

*Staff of the Orange County Mosquito and Vector Control District and its Board of Directors attend a variety of educational seminars, conferences and symposia annually. This report provides a brief summary of the event attended, and the organizational value of that attendance to the District.*

**Staff Name and Title:** Rick Howard, District Manager

**Name of Conference/Event:** Vector Control Joint Powers Insurance Authority

**Date:** February 25 and 26, 2021

**Location:** Virtual

I attended the annual meeting of the Vector Control Joint Powers Insurance Authority (The District's JPA Insurance Company) on February 25 and 26, 2021. The meeting was initially scheduled for Santa Cruz, however, due to COVID-19, the meetings were held virtually.

As I am sure you are aware, the District is self-insured, and is a member of the Vector Control Joint Powers Insurance Authority. The District is one of more than 30-member vector control agencies in California that is a member of the JPA.

Discussions centered around the District's insurance pool and the different types of coverage utilized, including general liability, vehicle, crime, unmanned aircraft, and worker's compensation.

Also, the JPA presented the overall financial stability of the pool. The overall pool presently has over \$30M in total assets, some of which are utilized to acquire additional higher threshold insurance for unforeseen catastrophic claims. The past year's claim trend was positive, in that there were fewer claims filed for smaller amounts of loss.

Other topics included the JPA's safety program (used by agencies) and legal challenges facing the industry,

A copy of the agenda and financial data is attached.

Date: March 9, 2021

Signed: *Rick Howard*

Print Name: Rick Howard



## Orange County Mosquito and Vector Control District

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*A Public Health Agency Serving Orange County Since 1947*

### Conference and Meeting Report

*Staff of the Orange County Mosquito and Vector Control District and its Board of Directors attend a variety of educational seminars, conferences and symposia annually. This report provides a brief summary of the event attended, and the organizational value of that attendance to the District.*

**Staff Name and Title:** Tina Pacific

**Name of Conference/Event:** VCJPA Annual Workshop

**Date:** February 25-26, 2021

**Location:** Virtual via Zoom

Attended the VCJPA Annual Workshop and Board Meeting in a virtual setting. The workshop covered information relevant to Vector Control Districts statewide. The presenters were from Sedgewick and the VCJPA Board and covered the following areas and topics:

- COVID-19 Update – An overview of the past year, the challenges faced by the vector control agencies. We were also reminded of the new legislation AB685 and SB1159 and agencies responsibilities.
- Financial– General overview of the Financial status of the VCJPA.
- Workers Compensation – Sedgewick and AIMS presented an overview of the pooled workers compensation program. They announced a new Medical Provider Network (MPN) and a Nurse Triage Program that will serve VCJPA agencies beginning July 1, 2021.
- Workshop – The 2021 annual workshop focused on Resolving Conflict in the Workplace. Presented by MHN Training and Development the workshop offered tools for agencies to use to recognize and resolve conflicts arising in the workplace.
- Safety and Risk Control- Reviewed safety practices and Tom Kline went over the various training available to us through our pool including Venemous Snake
- Pooled Liability Program – discussed layers of coverage and scenarios in which the various layers would be utilized.
- Legislative Updates – Discussed relevant legislation updates for 2021 including the new legislation related to: COVID-19 (AB685, SB1159), Mosquitoes (AB320), Rodenticides (AB1788) and Social Media related to the Brown Act (AB992)

Overall, I found this Annual Workshop to be especially relevant Vector Control related issues as well as networking with colleagues at other Districts throughout California.

Date: 03/01/2021

Signed Electronically: *Tina Pacific*

Print Name: Tina Pacific



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# AMCA's Virtual 87th Annual Meeting

## Agenda

You can filter the agenda on the drop-down tab below. You can also select the arrow button next to the presentation to see the author and abstract.

All times are posted in Mountain Time Zone.

## March 2, 2021

Welcome Address

9:00 AM-10:00 AM

Coffee Break

10:00 AM-10:30 AM

- > Plenary Keynote: Preventing the Next Pandemic: Vaccine Diplomacy in a Time of Anti-Science

10:30 AM-11:30 AM

Exhibit Hours

11:30 AM-1:00 PM

- > Evaluation of lambda-cyhalothrin barrier sprays for mosquito control in southwestern Virginia

1:00 PM-1:10 PM

Adult Control I

- > The Genesis of Mosquito Control in New Zion

1:00 PM-1:15 PM

Mosquito Control in the Beehive State Symposium

- > The weirdest of the weird mosquitoes of the world!

1:00 PM-1:03 PM

## Mosquito Lightning Symposium

- > Do tigers hunt during the day? Diel Activity of the Asian tiger mosquito, *Aedes albopictus* (Diptera:

1:03 PM-1:06 PM

## Mosquito Lightning Symposium

- > Mosquitoes pass through screens to enter traps

1:06 PM-1:09 PM

## Mosquito Lightning Symposium

- > *Aedes (Abraedes) papago*: A poorly known Sonoran Desert mosquito of the US-Mexico borderlands

1:09 PM-1:12 PM

## Mosquito Lightning Symposium

- > Genetic isolation and toxicological evaluation of the L1014F kdr mutation in field collected *Culex q*

1:10 PM-1:20 PM

## Adult Control I

- > Once-upon-a-time: Mosquitoes smell (parts) of you better at night

1:12 PM-1:15 PM

## Mosquito Lightning Symposium

- > Ties That Bind: UMAA & AMCA



1:15 PM-1:30 PM

Mosquito Control in the Beehive State Symposium

## &gt; How I became a mosquito sexologist

1:15 PM-1:18 PM

Mosquito Lightning Symposium

## &gt; Come out, come out, wherever you are! Hunting for Ixodes ticks in the Sierra Nevada Foothills

1:18 PM-1:21 PM

Mosquito Lightning Symposium

## &gt; A new study for IR3535 insect repellent against mosquito borne yellow fever vectors

1:20 PM-1:30 PM

Adult Control I

## &gt; How dogs saved South Texas from Zika virus

1:21 PM-1:24 PM

Mosquito Lightning Symposium

## &gt; Speed date to get hitched with impactful mosquito research of 2020

1:24 PM-1:27 PM

Mosquito Lightning Symposium

- > Chasing mosquitoes from Zanzibar to Papua New Guinea:  
following a trail blazed by Robert Desowitz  
1:27 PM-1:30 PM  
Mosquito Lightning Symposium
  
- > Frequency of kdr alleles in Aedes aegypti populations  
from coastal and high jungle areas in Peru  
1:30 PM-1:40 PM  
Adult Control I
  
- > The U of U's AMCA Legacy: Rees and Nielsen  
1:30 PM-1:45 PM  
Mosquito Control in the Beehive State Symposium
  
- > The Chaos after the swarm  
1:30 PM-1:33 PM  
Mosquito Lightning Symposium
  
- > The mosquito bucket list  
1:33 PM-1:36 PM  
Mosquito Lightning Symposium
  
- > Almost There! Dr. William Maull: Window Screens and  
Malaria  
1:36 PM-1:39 PM  
Mosquito Lightning Symposium

- > Utah is unique and so are our outbreaks  
1:39 PM-1:42 PM  
Mosquito Lightning Symposium
  
- > Efficacy of a new mode of action compound Imergard™  
Wettable Powder (WP) compared to Actellic® 300 C  
1:40 PM-1:50 PM  
Adult Control I
  
- > Is this working? An Applied-side approach to product  
assessment  
1:42 PM-1:45 PM  
Mosquito Lightning Symposium
  
- > When World War II found Brigham City  
1:45 PM-2:00 PM  
Mosquito Control in the Beehive State Symposium
  
- > What's that smell? Culex quinquefasciatus affinity for  
sewage-polluted water.  
1:45 PM-1:48 PM  
Mosquito Lightning Symposium
  
- > There ain't no party like a swarming party  
1:48 PM-1:51 PM  
Mosquito Lightning Symposium

- > Transfluthrin emanators in military tents protect against mosquitoes in a wooded temperate Florida h  
1:50 PM-2:00 PM  
Adult Control I
  
- > Breaking operational norms to meet the challenges of a rapidly evolving vector control industry  
1:51 PM-1:54 PM  
Mosquito Lightning Symposium
  
- > What is the value of mosquito pool testing for CHIK, DEN, and ZIKA viruses in CONUS?  
1:54 PM-1:57 PM  
Mosquito Lightning Symposium
  
- > Killing mosquitoes like Rambo, with 40mm Larvicide Grenades  
1:57 PM-2:00 PM  
Mosquito Lightning Symposium
  
- > Trapping for Control  
2:00 PM-2:10 PM  
Adult Control I
  
- > The History of West Nile in Utah  
2:00 PM-2:15 PM  
Mosquito Control in the Beehive State Symposium

- > Current status of organophosphate resistance in *Aedes taeniorhynchus* and *Culex nigripalpus* mosquito  
2:10 PM-2:20 PM

Adult Control I

- > Discovery of Cache Valley Virus in Utah  
2:15 PM-2:30 PM

Mosquito Control in the Beehive State Symposium

Welcome Reception

2:30 PM-3:30 PM

## March 3, 2021

- > Memorial Lecture Honoring Lewis T. Nielsen  
9:00 AM-10:00 AM

Coffee Break

10:00 AM-10:30 AM

- > Plenary Keynote: Mosquito Management in the Age of Science Denialism  
10:30 AM-11:30 AM

- > *Aedes aegypti* in 2020: Potential source preference  
11:30 AM-1:00 PM

## Poster Session

- > A model-based tool to evaluate spatially explicit mosquito-borne risk in the US Southern High Plains

11:30 AM-1:00 PM

## Poster Session

- > Reducing continued *Aedes aegypti* production among residents with a history of breeding

11:30 AM-1:00 PM

## Poster Session

- > Geospatial risk identification system (GRIdS): developing a risk-based West Nile virus response grid

11:30 AM-1:00 PM

## Poster Session

- > Public acceptance of a large-scale deployment of a *Wolbachia* strategy in Ponce, Puerto Rico

11:30 AM-1:00 PM

## Poster Session

- > Blood meal analysis and virus detection in mosquitoes collected from U.S. Air Force installations, 2

11:30 AM-1:00 PM

## Poster Session

- > Sterile insect technique - RS 2400Q  
11:30 AM-1:00 PM  
Poster Session
  
- > Knowledge, Attitudes and Practices on dengue and dengue control and the factors associated with the  
11:30 AM-1:00 PM  
Poster Session
  
- > Adapting a new education strategy in the age of COVID-19: MQA  
11:30 AM-1:00 PM  
Poster Session
  
- > Mosquito surveillance in the lower Rio Grande Valley, 2019-2020  
11:30 AM-1:00 PM  
Poster Session
  
- > Logistics of a 2,000 trap mosquito surveillance program  
11:30 AM-1:00 PM  
Poster Session
  
- > Establishment of a multi-county vector surveillance collaborative using Hurricane Recovery Crisis Co  
11:30 AM-1:00 PM  
Poster Session

- Morphological variances of *Aedes aegypti* mosquito populations in northern Tulare County

11:30 AM-1:00 PM

Poster Session

- Continued surveillance for insecticide resistance in mosquitoes along the Texas/Mexico Border

11:30 AM-1:00 PM

Poster Session

- Mosquitoes of the United States Virgin Islands: surveys reveal new records and species

11:30 AM-1:00 PM

Poster Session

- Use of sticky traps (AGO) for the surveillance of *Aedes aegypti* (Diptera: Culicidae) in three munic

11:30 AM-1:00 PM

Poster Session

- Examination of non-target effects of autodissemination approaches in lab and semi-field conditions

11:30 AM-1:00 PM

Poster Session

- Comparative field evaluation of different trap types, attractants, and light colors for collecting P



11:30 AM-1:00 PM

Poster Session

- > Development and validation of in-house arbovirus detection capacity for screening of West Nile virus

11:30 AM-1:00 PM

Poster Session

- > Characterization and efficacy of VectoBac® WDG against *Aedes aegypti* utilizing Unmanned Aerial System

11:30 AM-1:00 PM

Poster Session

- > Resistance to bendiocarb and malathion, and the Gly12Ser mutation in the *ace1* gene of *Aedes aegypti*

11:30 AM-1:00 PM

Poster Session

- > Comparative analysis of Black widow Toxins to Evaluate biomosquitocide Potential

11:30 AM-1:00 PM

Poster Session

- > First report of *Anopheles benarrochi* B in the Achuar Indigenous territory, a malaria-endemic area in

11:30 AM-1:00 PM

Poster Session

- > Cemetery vector control: key in the implementation of larviciding in cemeteries breathing sites.

11:30 AM-1:00 PM

Poster Session

- > Potential role of Integrated Aedes aegypti Monitoring (MI-Aedes) technology in improving targeted de

11:30 AM-1:00 PM

Poster Session

- > Evidence of West Nile virus and Saint Louis encephalitis virus in pools of mosquitoes testing negati

11:30 AM-1:00 PM

Poster Session

- > Harnessing the Power of the Science Classroom for Outreach Education

11:30 AM-1:00 PM

Poster Session

Exhibit Hours

11:30 AM-1:00 PM

- > Highlights of mosquito biology, 2019

1:00 PM-1:15 PM

7th Annual AMCA Arthropod Vector Highlights Symposium

- > To spray or not to spray, that is the question  
1:00 PM-1:15 PM  
Action Based Thresholds Symposium
  
- > Pyrethroid resistance in *Culex tarsalis* in several Northern Californian counties  
1:00 PM-1:10 PM  
Adult Control II
  
- > Social Media and Mosquito Control - Social Media 202: the Basics of Content Creation on Facebook, Tw  
1:00 PM-1:15 PM  
Social Media and Mosquito Control Symposium
  
- > High, Medium, Low: Using a Standardized County-Wide Grid Surveillance System to Prioritize Operation  
1:10 PM-1:20 PM  
Adult Control II
  
- > Highlights of mosquito biology, 2020  
1:15 PM-1:30 PM  
7th Annual AMCA Arthropod Vector Highlights Symposium
  
- > Minimum thresholds used to determine mosquito adulticide applications in the state of Florida  
1:15 PM-1:30 PM  
Action Based Thresholds Symposium

> Mosquito control is fun!

1:15 PM-1:30 PM

Social Media and Mosquito Control Symposium

> In vivo laboratory and operational quantification of kdr mutations in *Aedes aegypti*

1:20 PM-1:30 PM

Adult Control II

> Highlights of Vector Control

1:30 PM-2:00 PM

7th Annual AMCA Arthropod Vector Highlights Symposium

> Does the squeaky wheel deserve the attention?

1:30 PM-1:45 PM

Action Based Thresholds Symposium

> Select plant alkaloids synergize the toxicity and neural block of natural pyrethrins in *Aedes aegypti*

1:30 PM-1:40 PM

Adult Control II

> Negative or inflammatory comments on social media: best practices to address them

1:30 PM-1:45 PM

Social Media and Mosquito Control Symposium

- > Field evidence of displacement of *Aedes albopictus* by *Ae. aegypti* in downtown Gainesville, Florida  
1:40 PM-1:50 PM  
Adult Control II
  
- > Comprehensive mosquito surveillance through visualizing multiple types of data in the San Gabriel Va  
1:45 PM-2:00 PM  
Action Based Thresholds Symposium
  
- > Video content: Information that will leave a mark  
1:45 PM-2:00 PM  
Social Media and Mosquito Control Symposium
  
- > Evaluation of radiation doses on a Texas strain of *Aedes aegypti* for use in a SIT program  
1:50 PM-2:00 PM  
Adult Control II
  
- > Highlights of mosquito control and research in Africa 2019-2020  
2:00 PM-2:30 PM  
7th Annual AMCA Arthropod Vector Highlights Symposium
  
- > Aerial adulticiding planning and evaluation at Manatee County MCD  
2:00 PM-2:15 PM  
Action Based Thresholds Symposium

- > Toxicity of Different Groups of Insecticides and Determination of Resistance in *Aedes albopictus* from  
2:00 PM-2:10 PM  
Adult Control II
  
- > The Instagram Magic Touch  
2:00 PM-2:15 PM  
Social Media and Mosquito Control Symposium
  
- > Oxidase, Esterase, and KDR-Associated Pyrethroid Resistance in *Culex quinquefasciatus* Field Collecti  
2:10 PM-2:20 PM  
Adult Control II
  
- > What evidence thresholds are Anastasia Mosquito Control District used for operation control of mosquito  
2:15 PM-2:30 PM  
Action Based Thresholds Symposium
  
- > Target site kdr mutations in the voltage-gated sodium channel gene in pyrethroid-resistant *Aedes aegypti*  
2:20 PM-2:30 PM  
Adult Control II
  
- Exhibit Hours  
2:30 PM-3:30 PM

## March 4, 2021

### AMCA Annual Members Meeting

8:30 AM-9:45 AM

### Coffee Break

9:45 AM-10:15 AM

- > Record keeping requirements for small Unmanned Aerial Vehicles (sUAVs) conducting mosquito control

10:15 AM-10:25 AM

Aerial Control

### Diversity and Inclusivity Symposium

10:15 AM-11:45 AM

Diversity and Inclusivity Symposium

- > Bridging the gap: bringing environmental stakeholders into the classroom

10:15 AM-10:25 AM

Education/Management

- > Polymorphisms in the vgsc of in Mexico  
and their impact on resistance to p

10:15 AM-10:30 AM

Latin American Student Competition/ Latin American Symposium I

- > Laws and regulations you need to know about right now!  
10:15 AM-10:18 AM  
Legislative and Regulatory Symposium I
  
- > Science, hearsay and politics - does anyone win in the end?  
10:18 AM-10:33 AM  
Legislative and Regulatory Symposium I
  
- > Deluge and COVID: Midland County Michigan's Dam 2020 Problems  
10:25 AM-10:35 AM  
Aerial Control
  
- > Educating by example: using a native plant pollinator garden to demonstrate ecological responsibility  
10:25 AM-10:35 AM  
Education/Management
  
- > Interacting with the EPA: an end-users' perspective.  
10:33 AM-10:45 AM  
Legislative and Regulatory Symposium I
  
- > Efficacy of an aerial ULV application of Duet HD  
10:35 AM-10:45 AM  
Aerial Control



- > Source Reduction and Data Outcomes from NASA GLOBE Observer Mosquito Habitat Mapper Citizen Science  
10:35 AM-10:45 AM  
Education/Management
  
- > Joining Forces: Controlling Aquatic Vegetation and Mosquitos Utilizing Drone Technology  
10:45 AM-10:55 AM  
Aerial Control
  
- > GRAVID: Grasping, Retrieving, Abundant, Valuable, Information Directly. Trapping young minds while  
10:45 AM-10:55 AM  
Education/Management
  
- > Functional response of *Toxorhynchites moctezuma* (Diptera: Culicidae) on *Aedes aegypti* larvae  
10:45 AM-11:00 AM  
Latin American Student Competition/ Latin American Symposium I
  
- > Improving public information about pesticide risks and regulations  
10:45 AM-10:57 AM  
Legislative and Regulatory Symposium I
  
- > Characterization of the Distribution of Unmanned Aerial Spray Systems for Adulticiding and larvicidi

10:55 AM-11:05 AM

Aerial Control

- > Mosquito Identification for the Masses: training seasonal staff, volunteers, and building program ca

10:55 AM-11:05 AM

Education/Management

- > Updates to EPA Registration and Efficacy Testing of Pesticide Products Under PRIA 4

10:57 AM-11:09 AM

Legislative and Regulatory Symposium I

- > Life tables of an *Aedes aegypti* population under uncontrolled laboratory conditions of Bogotá, Colom

11:00 AM-11:15 AM

Latin American Student Competition/ Latin American Symposium I

- > Simple, flexible, and comprehensive software – How do you get there?

11:05 AM-11:15 AM

Aerial Control

- > The NACCHO model for capacity-building in local vector programs

11:05 AM-11:15 AM

Education/Management

- > **Pyrethroids: Where Are We Now**  
11:09 AM-11:21 AM  
Legislative and Regulatory Symposium I
  
- > **Cutting fogging costs with IOT devices**  
11:15 AM-11:25 AM  
Aerial Control
  
- > **Overview of a private industry mosquito control program using best management practices**  
11:15 AM-11:25 AM  
Education/Management
  
- > **Toxics Sugar, Potential Insecticide to Anopheles darlingi and Aedes aegypti in the Peruvian Amazon**  
11:15 AM-11:30 AM  
Latin American Student Competition/ Latin American Symposium I
  
- > **Pesticide residue on rice plants from mosquito control aduicide applications**  
11:21 AM-11:32 AM  
Legislative and Regulatory Symposium I
  
- > **Geographic Information Systems (GIS) as a tool to build vector-borne disease surveillance capacity i**  
11:25 AM-11:35 AM  
Aerial Control

- > Building on Experience with a Fresh Perspective  
11:25 AM-11:35 AM  
Education/Management
  
- > Biological effectiveness of thermal fog Icon® 2.5 EW  
(Syngenta code A13117E, Lambda cyhalotrina 2.5%)  
11:30 AM-11:45 AM  
Latin American Student Competition/ Latin American Symposium I
  
- > Legalization of Cannabis: Operational and Regulatory  
Hurdles to Mosquito Control in California  
11:32 AM-11:44 AM  
Legislative and Regulatory Symposium I
  
- > Drone surveillance of artificial larval habitats  
11:35 AM-11:45 AM  
Aerial Control
  
- Exhibit Hours  
11:45 AM-12:45 PM
  
- > Mosquitocidal Potential of the Widow Spider  $\alpha$ -toxin  
12:45 PM-1:00 PM  
Latin American Symposium II
  
- > AMCA federal funding opportunities

12:45 PM-12:57 PM

Legislative and Regulatory Symposium II

- > Strategic use of pre-hatch larvicides can optimize your mosquito control operations

12:45 PM-12:55 PM

Operations I

Young Professionals Symposium I

12:45 PM-2:15 PM

Young Professionals Symposium I

- > Overview of West Nile Virus in the United States

12:47 PM-1:07 PM

Twenty Years of West Nile Virus: Past, Present and Future Symposium I

- > 2020 bites! Volusia County Mosquito Control operational improvements

12:55 PM-1:05 PM

Operations I

- > Unmanned Aerial Systems (UAS) in Mosquito and Vector Control: A Regulatory Overview

12:57 PM-1:09 PM

Legislative and Regulatory Symposium II

- > Use of drones at fine scale for the association of demographic, socioeconomic and environmental fact  
1:00 PM-1:15 PM  
Latin American Symposium II
  
- > Phase 1 and 2 is in our back pocket- Let phase 3 begin in earnest! Utilizing classic mosquito biocon  
1:05 PM-1:15 PM  
Operations I
  
- > Changing the Public Perception of Mosquito Control  
1:07 PM-1:19 PM  
Twenty Years of West Nile Virus: Past, Present and Future Symposium I
  
- > Status of Malathion and Chlorpyrifos Endangered Species Act Consultations  
1:09 PM-1:19 PM  
Legislative and Regulatory Symposium II
  
- > The importance of the prevention of the *Aedes aegypti* mosquito in Puerto Rico during the COVID-19 pa  
1:15 PM-1:30 PM  
Latin American Symposium II
  
- > Rise of the machines: BG-Counters' expanding role in CMCD's mosquito surveillance program  
1:15 PM-1:25 PM  
Operations I

- > Development of a National Risk Assessment Methodology for Mosquito Adulticide Usage in Proximity to  
1:19 PM-1:29 PM  
Legislative and Regulatory Symposium II
  
- > Responding to WNV Disease Outbreaks in Areas without Established Mosquito Control Districts  
1:19 PM-1:31 PM  
Twenty Years of West Nile Virus: Past, Present and Future Symposium I
  
- > Controlling invasive Aedes in Los Angeles County Schools  
1:25 PM-1:35 PM  
Operations I
  
- > Seeking a Public Health Exemption for Mosquito Control under the Endangered Species Act  
1:29 PM-1:34 PM  
Legislative and Regulatory Symposium II
  
- > Resistance to temephos in Aedes aegypti (L) from Mexico  
1:30 PM-1:45 PM  
Latin American Symposium II
  
- > Genomic epidemiology of West Nile virus in California  
1:31 PM-1:43 PM  
Twenty Years of West Nile Virus: Past, Present and Future Symposium I

- > An approach to uniform labeling in implementing the outcome of FIFRA/ESA mosquitocide consultation  
1:34 PM-1:49 PM  
Legislative and Regulatory Symposium II
  
- > Developing a seasonal ULV training model that incorporates social distancing without sacrificing han  
1:35 PM-1:45 PM  
Operations I
  
- > West Nile Virus in Dallas County  
1:43 PM-1:55 PM  
Twenty Years of West Nile Virus: Past, Present and Future Symposium I
  
- > A regional arbovirus surveillance system for the Caribbean basin and Latin America  
1:45 PM-2:00 PM  
Latin American Symposium II
  
- > 2020 Hurricane Response  
1:45 PM-1:55 PM  
Operations I
  
- > Creating a BMP for mosquito control near pollinators  
1:49 PM-2:01 PM  
Legislative and Regulatory Symposium II



- > Automated county level mosquito surveillance program  
1:55 PM-2:05 PM  
Operations I
  
- > West Nile virus in the Northeast: current challenges and future directions  
1:55 PM-2:07 PM  
Twenty Years of West Nile Virus: Past, Present and Future Symposium I
  
- > Effectiveness of Actellic® 300 CS (Pirimiphos-methyl 28.9%) as alternative ULV formulation to contro  
2:00 PM-2:15 PM  
Latin American Symposium II
  
- > Mosquito control on National Wildlife Refuges  
2:01 PM-2:15 PM  
Legislative and Regulatory Symposium II
  
- > Are early adopters of Unmanned Aircraft Systems (UAS) transforming vector control agencies across th  
2:05 PM-2:15 PM  
Operations I
  
- Break  
2:15 PM-2:30 PM
  
- > UAS Digital Elevation Imagery for Field Application Design

2:30 PM-2:40 PM

Operations II / New Products

- Announcing RoboSIT: The European Union to invest in Senecio Robotics building automated Sterile Inse

2:30 PM-2:40 PM

Public Relations

- Developing Sterile Insect Technique for *Aedes aegypti* control in the U.S.

2:30 PM-2:45 PM

Rated SIT: Sexual Content No Children Allowed Symposium

- More than West Nile virus – maintaining priorities within a full vector program

2:30 PM-2:42 PM

Twenty Years of West Nile Virus: Past, Present and Future Symposium II

- Florida Mosquito Control District and Open Program Capabilities during the COVID-19 Crisis

2:40 PM-2:50 PM

Operations II / New Products

- Maintaining School Outreach Momentum While Navigating COVID-19 Distance Learning in Placer County

2:40 PM-2:50 PM

Public Relations

- > Making the most of mosquito and arbovirus surveillance data  
2:42 PM-3:00 PM  
Twenty Years of West Nile Virus: Past, Present and Future Symposium II
  
- > Startup costs associated with an X-ray SIT Program at the Lee County Mosquito Control District  
2:45 PM-2:52 PM  
Rated SIT: Sexual Content No Children Allowed Symposium
  
- > Sirenix, lethal ovitrap killing efficacy results from University Sains Malasia  
2:50 PM-3:00 PM  
Operations II / New Products
  
- > Humanizing Mosquito Control  
2:50 PM-3:00 PM  
Public Relations
  
- > Just add water - a game changing tool to control Aedes aegypti  
2:52 PM-3:07 PM  
Rated SIT: Sexual Content No Children Allowed Symposium
  
- > It's registered, so it's ready to go, right? What it means to optimize a new product for operational  
3:00 PM-3:10 PM

## Operations II / New Products

- > Using a digital media campaign to fight the bite  
3:00 PM-3:10 PM  
Public Relations
  
- > Vector index as a driver for control  
3:00 PM-3:12 PM  
Twenty Years of West Nile Virus: Past, Present and Future Symposium II
  
- > Planning and implementation for genetically modified male release trials in the Florida Keys  
3:07 PM-3:14 PM  
Rated SIT: Sexual Content No Children Allowed Symposium
  
- > Collection Performance of the New BG-Pro Mosquito Traps in Various Locations Around the World  
3:10 PM-3:20 PM  
Operations II / New Products
  
- > Scaling brick walls to advance understanding about vectors and their control  
3:10 PM-3:20 PM  
Public Relations
  
- > Real time West Nile virus forecast: operational challenges  
3:12 PM-3:22 PM

## Twenty Years of West Nile Virus: Past, Present and Future Symposium II

- > Technology to make SIT feasible at scale, including automated monitoring, sex sorting, packaging and  
3:14 PM-3:29 PM  
Rated SIT: Sexual Content No Children Allowed Symposium
  
- > Evaluation of x-ray irradiation technology for Sterile Insect Technique to control mosquito vectors  
3:20 PM-3:30 PM  
Operations II / New Products
  
- > Buzzin' on a Budget  
3:20 PM-3:30 PM  
Public Relations
  
- > CDC Perspective and Recommendations for Future West Nile Virus Vector Control  
3:22 PM-3:42 PM  
Twenty Years of West Nile Virus: Past, Present and Future Symposium II
  
- > Natural Vector Control (NVC) – Using SIT to prevent dengue in the midst of an epidemic  
3:29 PM-3:44 PM  
Rated SIT: Sexual Content No Children Allowed Symposium

- > Novel automated sorter: larvae, male and female pupae continuous separator

3:30 PM-3:40 PM

Operations II / New Products

- > Quantitative and qualitative analyses of two Biogents traps: the BG-Pro trap and the BG Counter 2 wi

3:40 PM-3:50 PM

Operations II / New Products

- > Moving gene drive technology from laboratory to field deployment: designing field trials.

3:44 PM-3:59 PM

Rated SIT: Sexual Content No Children Allowed Symposium

## March 5, 2021

- > Silver-doped nanoceria halt egg development in ovarioles of *Aedes aegypti* mosquitoes

9:00 AM-9:10 AM

Behavior &amp; Biology I

- > CDC Hurricane Cooperative Agreement Funding

9:00 AM-9:35 AM

CDC Hurricane Cooperative Agreement Funding Symposium I

- > Mosquitoes of the World: Biodiversity, Barcodes and Biosurveillance  
9:00 AM-9:20 AM  
Mosquito Identification: What's in a name? Symposium
  
- > Earth observations applied to a changing world: NASA Health and Air Quality Applications  
9:00 AM-9:15 AM  
NASA Earth Observations for Improved Vector-borne Disease Surveillance Symposium
  
- > Pyrethroid and organophosphate resistance in *Culex tarsalis*  
9:00 AM-9:10 AM  
Student Paper Competition I
  
- > Cisterns as challenging peridomestic *Aedes aegypti* habitats in the United States Virgin Islands  
9:10 AM-9:20 AM  
Behavior & Biology I
  
- > Metabolic resistance in Florida *Aedes aegypti* mosquitoes  
9:10 AM-9:20 AM  
Student Paper Competition I
  
- > A Thermodynamic Paradigm for Studying Disease Vector's Habitats & Life Cycles Using NASA's NextGen R  
9:15 AM-9:30 AM

NASA Earth Observations for Improved Vector-borne Disease Surveillance  
Symposium

- > Impact of radiation on *Aedes aegypti* microbiome in relation to SIT

9:20 AM-9:30 AM

Behavior & Biology I

- > How the USNM collection can inform taxonomic studies, develop novel identification tools, and track

9:20 AM-9:38 AM

Mosquito Identification: What's in a name? Symposium

- > Effects of three successive ground ULV adulticide applications on *Culex* mosquito abundance, age stru

9:20 AM-9:30 AM

Student Paper Competition I

- > Non-target effects of autodissemination approaches for mosquito control

9:30 AM-9:40 AM

Behavior & Biology I

- > Achieving >90% Sensitivity in Forecasting Malaria Risk 12 weeks in advance in the Amazon

9:30 AM-9:45 AM

NASA Earth Observations for Improved Vector-borne Disease Surveillance  
Symposium



> **Aedes aegypti Insecticide Resistance at Different Temperatures and Different Exposure Treatments**

9:30 AM-9:40 AM

Student Paper Competition I

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**AMCA Virtual Annual Meeting  
At - A - Glance Schedule**

Tues March 2	9:00 am - 10:00 am	Welcome Address				
	10:00 am - 10:30 am	Coffee Break Sponsored by ADAPCO				
	10:30 am - 11:30 am	Plenary Keynote with Peter Hotez				
	11:30 am - 1:00 pm	Exhibit Hours				
	1:00 pm - 2:30 pm	Mosquito Lighting Symposium	Mosquito Control in the Beehive State Symposium	Adult Control I		
	2:30 pm - 3:30 pm	Welcome Reception				
Wed March 3	9:00 am - 10:00 am	Memorial Lecture Honoring Lewis T Nielsen				
	10:00 am - 10:30 am	Coffee Break Sponsored by Central Life Sciences				
	10:30 am - 11:30 am	Plenary Keynote with Bob Peterson				
	11:30 am - 1:00 pm	Exhibit Hours	Poster Session Q&A			
	1:00 pm - 2:30 pm	Action Based Thresholds Symposium	7th Annual AMCA Arthropod Vector Highlights Symposium	Social Media and Mosquito Control Symposium	Adult Control II	
	2:30 pm - 3:30 pm	Networking Roundtables				
Thurs March 4	8:30 am - 9:45 am	AMCA Annual Members Meeting				
	9:45 am - 10:15 am	Coffee Break Sponsored by Clarke				
	10:15 am - 11:45 am	Legislative and Regulatory Symposium I	Latin American Student Competition/ Latin American Symposium I	Education/ Management	Aerial Control	
	11:45 am - 12:45 pm	Exhibit Hours				
	12:45 am - 2:15 pm	Legislative and Regulatory Symposium II	Twenty Years of West Nile Virus: Past, Present and Future Symposium I	Latin American Symposium II	Young Professionals Symposium I	Operations I
	2:15 pm - 2:30 pm	Break				
	2:30 pm - 4:00 pm	Rated SIT: Sexual Content No Children Allowed Symposium	Twenty Years of West Nile Virus: Past, Present and Future Symposium II	Public Relations	Operations II/ New Product	
Fri March 5	9:00 am - 10:30 am	CDC Hurricane Cooperative Agreement Funding Symposium I	Student Paper Competition I	NASA Earth Observations for Improved Vector-borne Disease Surveillance Symposium	Mosquito Identification: What's in a name? Symposium	Behavior & Biology I
	10:30 am - 11:00 am	Coffee break sponsored by Valent BioSciences				
	11:00 am - 12:30 pm	CDC Hurricane Cooperative Agreement Funding Symposium II	Student Paper Competition II	Mosquito Control District and Department of Defense Collaborations Symposium	Spatial Repellents to Protect Civilian and Military: Laboratory and Field Evaluations Symposium	Behavior & Biology II
	12:30 pm - 1:30 pm	Exhibit Hours				
	1:30 pm - 3:00 pm	Recent Large Scale Wolbachia Trials and Progress Towards Commercialization Symposium	Current Mosquito and Vector Research in Utah Symposium	Larval Control	Disease & Vector Studies	



# Orange County Mosquito and Vector Control District

*A Public Health Agency Serving Orange County Since 1947*

## Conference and Meeting Report

*Staff of the Orange County Mosquito and Vector Control District and its Board of Directors attend a variety of educational seminars, conferences and symposia annually. This report provides a brief summary of the event attended, and the organizational value of that attendance to the District.*

**Staff Name and Title:** Rick Howard, District Manager

**Name of Conference/Event:** American Mosquito Control Association Annual Meeting

**Date:** March 2-5, 2021

**Location:** Virtual

I attended the American Mosquito Control Association (AMCA) Annual Conference which was virtually from March 2 to March 5, 2021. The meeting was initially scheduled to take place in Salt Lake City, UT.

The American Mosquito Control Association ([www.mosquito.org](http://www.mosquito.org)) is the industry's annual flagship educational conference, with participants from all 50 states and U.S Territories, as well as international participants from all corners of the globe.

The conference keynote address was presented by Dr. Bob Peterson, Professor, Montana State University. His talk was titled "*Mosquito Management in the Age of Social Denialism.*" The talk was exceptional, and applicable to our current social struggles with Covid-19. We are trying to obtain a link of the talk to be able to share it with all of you. I will keep you posted and hopefully we will get permission to soon.

Overall, sessions were exceptional. A copy of the conference agenda is attached for your perusal.

The conference proved to be a valuable experience. I encourage you to attend next year's conference, scheduled for Jacksonville Florida in March 2022.

Date: March 9, 2021

Signed: Rick Howard

Print Name: Rick Howard



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**Staff Name and Title:** Tawnia Pett, Executive Assistant/Clerk of the Board

**Name of Conference/Event:** AMCA Annual Conference

**Date:** March 2-5, 2021

**Location:** Virtual Conference

There were a number of great presentations at this year's AMCA annual conference.

One of the highlights was the Pan-African Mosquito Control Association joined our association this year. The Association President gave a brief presentation on mosquito control in Africa. It was interesting to see how different their programs are compared to European and United State's programs. Africa programs are highly centralized programs run by the country, rather than our highly decentralized programs run individual districts, and their programs deal with human death on a much larger scale (about 500,000 people die every year from malaria), compared to the European and United States programs. But these African programs did have some interesting technology that I've never seen before. For example, they have mosquito repellent sandals, and they have pesticide permeated fabric that is attached along the eaves of houses as a means of mosquito control. Both of these innovations could be introduced as homeowner control measures that could be purchased at any home supply store for mosquito control.

I also watched the Action Based Thresholds Symposium. This symposium had presentations discussing when it is determined to provide mosquito control. What parameters have to be met to trigger a response. And each district has different factors that have to be met- whether it's the number of mosquitoes, number of virus positive mosquitoes, number of human cases, or other factors, to trigger a response to control for mosquitoes.

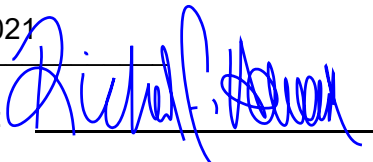
Another interesting presentation showed how invasive species can have a ripple effect on the environment. In the Florida everglades, python snakes have been introduced into the ecosystem. These snakes eat the rabbits that live in the everglades. Well, the rabbits were a primary food source for mosquitoes in the area. With their food sources diminished, the mosquitoes have adapted to wait for manatees to come up for air, and when they do, the mosquitoes feed on the manatees. So, while this is just the first study of its kind, it's interesting

to see how mosquitoes adapt to their changing environment.

Another exciting presentation was by NASA staff. They have created a free app called GLOBE Observer Mosquito Habitat Mapper for Citizen Scientists. This app allows people to take photos of mosquito sites and these photos are all geo-tagged so District staff could visit these sites for mosquito control. But aspects that make this app cooler than similar apps, is the citizen scientist aspect. People can take photos of the mosquito larvae they find in the water, the app will walk them through how to identify the larvae by species, and as the people are going through all of these steps, only if they want to, the app teaches them about mosquitoes, has them dump out the water, and strengthens the self-resiliency for mosquito control. All of the information on the found mosquitoes is uploaded on to the habitat mapper website so staff could use that information as a secondary resource to find potential mosquito breeding in the county. Everyone might not want to take the time to fill out a service request online, but they might be much more amiable to take a quick photo of a water source, knowing it will be taken care of. I'll be downloading this app on my phone to check it out.

Another interesting symposia was hosted by NASA. The whole series of presentations was about how satellites can help track mosquitoes and viruses. The information collected by the satellites show climate change, water movement, vegetation changes, among other things. While these atmospheric trackings don't necessarily fit into the urban environment of Orange County, the data collected can show potential virus activity in areas that could be spread to the region through trade or travel.

Overall, since this was a virtual conference, it was an excellent opportunity to see a greater number of presentations from people all over the world that don't normally have the funds to travel to the United States to attend this conference. My favorite presentations are learning how other agencies do mosquito control and seeing if any of their techniques, or ideas, could be incorporated into our program and this virtual platform gave many more presenters the opportunity to share their studies or share their districts with the attendees.

Date: March 5, 2021  
Dept Mgr Signature: 

Signed: Tawnia Pett  
Print Name: Tawnia Pett



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**Staff Name and Title:** Steve Shepherd, Director of Operations

**Name of Conference/Event:** AMCA 2021 Conference

**Date:** March 2<sup>nd</sup> – March 5<sup>th</sup>, 2021

**Location:** Online

This was the second online conference I have attended this year and I am enjoying the format. Many of the presentations are recorded beforehand and available to view after the original presentation time. This enables the attendee to move to any of the virtual presentations they find most valuable, pause the talk if you get interrupted, or go back to watch a section again for deeper understanding. The format also allows you to skip sections you do not find as educational enabling the participant to manage their time efficiently.

There were over 265 presentations and I have viewed almost half during the conference time and will continue to view the others I find valuable over the next few weeks.

I found the sections covering innovative mosquito control techniques most valuable and interesting. Many Vector Control Districts across the country have already begun trials with sterile insect technology, genetic engineering and Wolbachia infused mosquito releases. All three methods provide many advantages over traditional methods and I plan to explore these methods further to see if they make sense to implement at our District.

Date: 3/8/2021

Signed: Steve Shepherd

Dept Mgr Signature: \_\_\_\_\_

Print Name: Steve Shepherd



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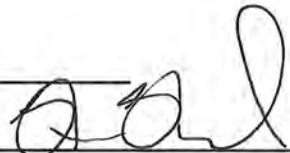
**Staff Name and Title:** John Drews

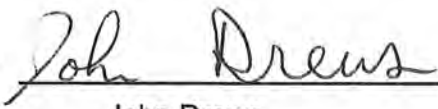
**Name of Conference/Event:** AMCA

**Date:** 3/2/31-3/5/21

**Location:** Virtual

Wow what a great conference, it was interesting to see that in other parts of the country we all struggle with some of the same issues. The presentation on the NASA Global mosquito habitat mapper APP, was quite interesting. This is a free app. That can be used on phone or tablets and is available to anyone. The purpose is to get the public to be citizen scientists. They can report standing water issues from any where in the country. And upload pictures of breeding including larvae samples if they so choose. Those with the app can see all uploaded info and drill down to the street level. This tool could be used by vector control workers. This Conference had all the cutting-edge tools on display, including drone use, sterile mosquitos for aedes control, and all the new types of spray equipment. There were also great talks on dealing with the public through this pandemic. I learned a lot during this conference on new aedes trapping tools. And overall think that this was put together in a way that covered every aspect of what good vector control should be. I truly appreciate those who gave me the opportunity to attend this years AMCA. Thank you.

**Date:** 3/5/21  
**Dept Mgr Signature:** 

**Signed:**   
**Print Name:** John Drews



## Orange County Mosquito and Vector Control District

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### Conference and Meeting Report

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**Staff Name and Title:** Kara Miller, Administrative Specialist

**Name of Conference/Event:** 2021 AMCA Virtual Annual Meeting

**Date:** March 2<sup>nd</sup> – March 5<sup>th</sup>, 2021

**Location:** Virtual

The 2021 AMCA Annual conference was held virtually this year and offered the opportunity to view multiple symposiums since it was prerecorded. I was able to hear over 60 speakers during the four-day scheduled conference and I plan to view other symposiums in the coming days. Several vendors gave presentations on the newest technologies and equipment for mosquito control. Below I have summarized a few symposiums that I viewed and information I learned and/or feel would be beneficial to Orange County Mosquito and Vector Control.

#### **Adult Control I and Adult Control II**

Benjamin McMillan gave a presentation about using lambda-cyhalothrin as a barrier spray for mosquito control. In his study, residents were surveyed at the beginning, middle, and end of barrier treatment. This determined that overall mosquito pressure was significantly decreased when using lambda-cyhalothrin as a barrier. This should be something Orange County Mosquito and Vector Control District should try using to help with Aedes mosquitoes.

Howard Epstein, Ph.D. presented the study he did on IR3535 against mosquito-borne yellow fever vectors. Yellow Fever is not common in the United States but is possible. Large epidemics of yellow fever occur when infected people introduce the virus into heavily mosquito-populated areas with high mosquito density and where most people have little or no immunity, due to lack of vaccinations. In these conditions, infected mosquitoes of the Aedes aegypti species transmit the virus from person to person. There is no cure for yellow fever and CDC recommends the use of insect repellent to reduce the risk of contracting yellow fever. Howard Epstein, Ph.D. conducted an arm-in-cage mosquito repellent study comparing IR3535 a nature-inspired EPA registered biopesticide to DEET and found that IR3535 provided 10 hours of protection. Based



on this study, IR3535 would be ideal to recommend to the public as well as used for OCMVCD field staff.

**Education / Management**

Andrea Miller from Lee County Mosquito presented their education program. They have an education program for kindergarten, 5th grade, 7th grade, high school biology, and high school chemistry. In addition to school programs, they have a summer camp program and do outreach events. For kindergarten, they recommend teaching basic attributes of insects, including an insect's life cycle. In 5th grade, they teach the relationship between weather and mosquitoes, the life cycle of mosquitoes, and mosquito control methods. For 7th grade, they focus on the importance of insects to natural systems and the health and economic problems posed by insects. High School Biology agents can be alternatives to chemical pesticides for pest control and chemistry the importance of monitoring pesticides resistance through susceptibility testing. Orange County Mosquito and Vector Control District currently only has a 4th-grade program and expanding it would be beneficial to continually educating the youth of Orange County.

**Operations I and Operations II / New Products**

Rebecca Heinig from Collier Mosquito Control District shared information on BG-Counters that they use for mosquito surveillance. BG-Counters are an automated mosquito counter unit that counts the mosquitoes in real-time. The counters send the counts every 15 minutes to a web-based server. BG-Counters attract a broad range of mosquito species. When used they give you a large coverage area and minimal staffing is required. I feel that BG-Counters would be beneficial for OCMVCD to invest in. This would save our district time and money when using BG-Counters for surveillance.

David Lopez from Greater Los Angeles County Vector Control District spoke about Invasive Aedes at schools and how they deal with the service request. GLACVCD is finding interior and exterior sources at schools in their county. Some of the control methods they use are educating staff, identify sources, eliminate sources, and exclusionary methods. As a last resort, they will adulticide or larvicide. Documenting everything and being detailed is important when dealing with school sites. Greater LA Vector implemented a Mosquito Awareness Training program for schools that places the responsibility on the schools. I would recommend OCMVCD implement a program like GLACVCD for Orange County school districts as well.

**Mosquito Identification: What's in a name? Symposium**

Insights into mosquito diversity and ecology through DNA barcoding symposium was given by Lawrence Reeves from the University of Florida. Since there are over 3,500 mosquito species throughout the world, identifying mosquitoes can be difficult and DNA barcoding can be used. DNA barcoding can also be used to analyze a mosquito's blood meal and determine the host of a specific mosquito. This symposium was educational for someone who does not have much scientific background.

Date: 3-9-21

Dept Mgr Signature: \_\_\_\_\_



Signed: \_\_\_\_\_



Print Name: \_\_\_\_\_

Kara Miller



# Orange County Mosquito and Vector Control District

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## Conference and Meeting Report

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**Staff Name and Title:** Amber Semrow, Director of Scientific Technical Services

**Name of Conference/Event:** American Mosquito Control Association 2021 Conference

**Date:** March 2-5, 2021

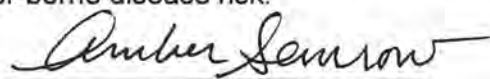
**Location:** Virtual

The American Mosquito Control Association 2021 Conference was exceptional this year. The program was very robust and the symposia were interesting and innovative. I last attend this conference in 2019 and since that time it was clear that the advances in the industry have accelerated at rapid pace.

There were many presentations on Sterile Insect Technique (SIT). The three primary SIT methods that were discussed included, *Wolbachia* bacteria infected mosquitoes, Oxitec genetically modified mosquitoes, and irradiated mosquitoes. The *Wolbachia* method has been done in Fresno, California, and Miami-Dade, Florida previously. There is currently a large-scale *Wolbachia* program in Puerto Rico. The Oxitec method is occurring this season in the Florida Keys. The irradiation method is being done in Harris County, Texas, Lee County, Florida, and in St Augustine, Florida. These methods are increasingly being incorporated into mosquito and vector control programs across the county. Presenters shared the success of the method they used, discussed challenges, and shared details about associated costs. Doing extensive public outreach and education when incorporating a SIT method into your integrated vector management is a critical component to public acceptance and the overall success. Agencies and companies are innovating the production, equipment, and release technologies associated with SIT. Use of artificial intelligence (AI) for sorting mosquitoes and drones for releasing mosquitoes are the cutting edge of this exiting new horizon in mosquito control.

Another standout subject at the conference involved presentations about how satellite technology is being used in disease risk predictive models and forecasting. NASA scientists and associates explained how data collected from satellites track environmental conditions that are run through sophisticated models which predict vector-borne disease risk.

**Date:** March 9, 2021

**Signed:** 

**Print Name:** Amber Semrow



## Orange County Mosquito and Vector Control District

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### Conference and Meeting Report

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**Staff Name and Title:** Sokanary Sun

**Name of Conference/Event:** AMCA 2021

**Date:** March 2-5, 2021

**Location:** Virtual (from any desktop or laptop)

Similarly to MVCAC, AMCA allows agencies to come together and share research or various agency updates regarding vectors, diseases, or technology, except at the national level instead of just within California.

The highlight for day 1 was the plenary keynote speaker, Dr. Peter Hotez. He emphasized the importance of vaccinations for public health safety, and dove into the history of vaccine hesitancy, the medical freedom movements, and anti-science, which are fueled by misinformation. To combat misinformation, scientists need to find creative ways to better communicate with the general public, as well as attempt to counter misinformation with transparency and facts.

The highlight for day 2 was the plenary keynote speaker, Dr. Robert (Bob) Peterson. This presentation could have trailed Dr. Hotez's talk regarding the movement and dangers of anti-science. Humans are predictably irrational (system 1: fast thinking, automatic thinking) because it contributed to survival. However, irrational thinking is highly error prone. System 2 thinking (slow, conscious, and effortful) is the rational way, and is much less prone to error. Since humans tend to revert to irrational thinking, especially during times of stress, it led to the growth of people believing an opinion is the same thing as objective fact, when it is not. This facilitated the issues the world has with anti-science, vaccine hesitancy, and misinformation. Dr. Peterson also suggests scientist learn to better communicate with the general public to help develop trust and combat misinformation.

The highlight for day 3 was the presentation by Anita Schiller from Harris County, TX. The lab she works with focuses on a variety of biological control methods, which consists of natural predators that consume mosquito larvae. Species used for biological control of mosquito larvae include *Toxonrhynchites* mosquito larvae, parasitic round worms (nematodes) species *Romanomermis culicivorax*, and copepod crustaceans from the genus *Mesocyclops*. Our

District currently only offer *Gambusia affinis*, mosquito fish, as a method for biological control, so these extra tools can be something our District may want to invest in for the future. I also was captivated by the Senecio presentation regarding automatic mosquito identification, given by Hanan Lepek. The proposed machinery would automatically separate mosquitoes captured from traps, automatically photograph them for species identification, generate data and visualize results, and automatically place them in vials for disease testing. If this contraption works well, this can be a game changer in terms of mosquito identification, processing, and testing. This can potentially free up time for vector personnel and/or allow expansions of other integrative vector management projects.

The highlight for day 4 was a presentation by Mona Mathew from the University of Central Florida. Her talk discussed nanoceria, which are well-characterized silver-doped cerium oxide nanoparticles (AgCNPs). Nanoceria has the potential to negatively impact egg development of *Aedes aegypti*, the invasive day biting yellow fever mosquito. This novel and impactful tool can be added for use in rotation of different products with different modes of actions, especially since pesticide resistance is a growing problem in the world. Connor O'Brien-Stoffa from the Metropolitan State University of Denver found that *Sabethes cyaneus* and *Sabethes chloropterus* mosquitoes had a strong preference for blood feeding around the human nose. These kinds of studies can be expanded to mosquito species in Orange County, CA to see where they prefer to bite, which means these are areas people may need to target when wearing mosquito repellent.

Date: 3-5-21

Signed: 

Dept Mgr Signature: 

Print Name: Sokanary Sun



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**Staff Name and Title:** Tim Morgan (Vector Ecologist)

**Name of Conference/Event:** 87<sup>th</sup> Annual Meeting of the AMCA

**Date:** March 2-5, 2021

**Location:** Virtual Meeting-Attended from District Office

I viewed various sessions, including, Adult Control 1, Action Based Thresholds Symposium, Aerial Control, Operations 1, Operations II/New Product, and Behavior & Biology 1 and 2. Each symposium housed many excellent talks and information valuable to our District. I selected symposia that was best suited to enhance my knowledge on adult and larval mosquito control as we have been adding various new state of the art components and strategies of mosquito control to our District's toolbox recently and I would like to continue these strategic advancements to better serve the public. Several talks discussed the efficacy of aerial and ground-based treatments, of most interest to me was how the efficacy of adult mosquito treatments are evaluated. Some key points included, identifying the optimal times to make adulticide applications and how to identify those times and when and how many treatments should be made. These factors play a large role in the magnitude of the impact a control effort has on a mosquito population. Efficacy may be assessed by comparing mosquito populations and disease prevalence in an area before and after a treatment compared to an area that is not treated. I learned there are some important assumptions that must be met to make such comparisons mathematically valid when using a specific formula, called Mulla's formula.

Invasive *Aedes* mosquitoes are still a central focus of many presenters as a couple species continue to spread and increase in numerous U.S. states. One presentation discussed the unsuspected movement of *Aedes aegypti* northward into areas believed to be too cold to support the species. The intentions behind the control of adult invasive *Aedes* can be split into two main categories, nuisance reduction and disease reduction. The key to chemical control when targeting adults or larvae over relatively large areas, is to be able to deliver the material to the target in an efficient and effective manner. This often proves very difficult in urban settings, compared to rural areas, but can be accomplished when the appropriate application equipment is used and

calibrated for the prevailing climatic conditions specific to the target area. Several talks emphasized many of these points and highlighted the need to use products and equipment that are best matched for the target mosquito and the climatic conditions present within the area of concern.

Date: March 8, 2021

Signed: Tim Morgan

Dept Mgr Signature: *Amber Lemrow*

Print Name: Tim Morgan



## Orange County Mosquito and Vector Control District

*A Public Health Agency Serving Orange County Since 1947*

### Conference and Meeting Report

*Staff of the Orange County Mosquito and Vector Control District and its Board of Directors attend a variety of educational seminars, conferences and symposia annually. This report provides a brief summary of the event attended, and the organizational value of that attendance to the District.*

**Staff Name and Title:** Philip Shin, Laboratory Fishery Assistant

**Name of Conference/Event:** 2021 AMCA Virtual Annual Meeting

**Date:** Tuesday, March 2nd – Friday, March 5th

**Location:** Online Zoom Meetings Watched at OCMVCD

This was the first AMCA I have attended during my time at OCMVCD. With the challenges of corona virus halting our ability to attend in person, this year's conference was also held entirely online, through live Zoom presentations and preloaded Vimeo videos. While there were many informative presentations throughout the entirety of the conference, there were significant points that stood out to me. I enjoyed the Mosquito Lightning Symposium, for there was a lot of useful information presented to us quickly at around three minutes per presentation. Just like humans, mosquitoes have circadian rhythms that drive their daily behaviors. A mosquito's daily rhythmic behavior can be driven by a response to light, therefore heightening its sense of smell at sun-down, allowing it to detect certain parts of our body better at night. Another significant point that was ingrained by multiple presenters is the use of insecticides and the determination of when or when not to treat certain areas for specific species of mosquitoes.

While watching the Adult Control and Action Based Thresholds symposia, I learned the importance of environmental factors, mosquito surveillance, and pathogen surveillance. All these factors assist on our decisions of when to spray or not to spray. While there are many benefits to an application of chemicals in an area, there are risks of resistance and reappearance that follow. It is found that populated areas are more prone to resistance than agricultural and industrial areas. When consumers used one type of chemical each time, whether it was organophosphates, pyrethroids or carbamates, the risk of resistance was further confirmed. It is important to rotate the group of chemicals being used and the formulation of chemicals must be changed. While the formatting of the website was easy to navigate, it was troublesome to constantly refresh and search for the next symposium after finishing the prior. Personally, the scheduled coffee breaks that were designed for networking, was instead used to look through poster presentations.

Date: 3/8/2021

Signed: Philip Shin

Dept Mgr Signature: *Philip Shin*

Print Name: Philip Shin



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**Staff Name and Title:** Kassandra Reyes, Administrative Specialist

**Name of Conference/Event:** AMCA

**Date:** March 2-5

**Location:** Virtual

I had the opportunity to attend the AMCA conference for the first time this year and I felt that it was an amazing opportunity to learn more about what we do in our job every day. I gained a better understanding on why we must control mosquitoes and the dangers they pose our communities. It was amazing to see other techniques that districts are using across the country. I was able to attend several symposiums but I'm excited to watch the rest these next few weeks.

The symposium titled "Twenty Years of West Nile Virus: Past present and Future" was one of my favorites. Janet McAllister did an amazing presentation titled "Overview of West Nile Virus in the United States" where I learned that WNV was first identified in Uganda in 1937, the first outbreak in the United States occurred in New York in 1999, and that the Virus is now endemic in North, Central, and South America. I feel that the knowledge I gained from this symposium is something I will be using in the future when speaking to the public.

I watched several poster presentations that were informative but two that stood out to me were Rafael A. Savavedra-Hernandez's poster titled "Public acceptance of a large-scale deployment of a Wolbachia strategy in Ponce, Puerto Rico" He stated in his presentation that approximately 50% of the residents already knew about Wolbachia and about 13% had questions about the process. After going door to door and sharing more information with the residents they received an 85% acceptance rate. Crystal Grippin also had a great poster presentation titled "Reducing continued Aedes aegypti production among residents with a history of mosquito breeding" where she explained that 33% of homes that were breeding mosquitoes continued to do so the subsequent year. I can see our district doing similar projects in the future.

**Date:** March 8, 2021

**Signed:** Kassandra Reyes

**Dept Mgr Signature:** *Amber Semrow* **Print Name:** Kassandra Reyes





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**Staff Name and Title:** Robert F. Cummings, former Director of Scientific Technical Services

**Name of Conference/Event:** 87<sup>th</sup> Annual American Mosquito Control Conference

**Date:** March 2-5, 2021

**Location:** Virtual, hosted by the Salt Lake City Mosquito Abatement District

The American Mosquito Control Association (AMCA) held its 87<sup>th</sup> Annual Conference from March 2-5, 2021. Because of Covid-19 restrictions, the conference was held virtually via Zoom. I attended 30 symposia that addressed a wide-variety of topics, which ranged from mosquito control equipment, trapping devices, laboratory testing procedures for insecticide resistance and diseases, status reports on West Nile virus (WNV) activity in the U.S., updates on environmental regulations, and presentations on non-conventional mosquito control strategies.

Many presentations were made about the latest reproductive-focused strategies that have been proposed to suppress populations of the extremely pestiferous, day-biting *Aedes aegypti* mosquito. Four genetically-based methods have been proposed, with all of them requiring the release of large numbers of laboratory-bred, male mosquitoes that can suppress their own populations through the principle called Sterile Insect Technique (SIT). The four SIT methods under consideration are: release of *Wolbachia*-infected males, release of males with a gene that kills only their female offspring, release of males that have been rendered sterile after irradiating them with X-rays, and release of males that carry a lethal RNA interfering molecule, RNAi. Each population suppression method has its advantages/disadvantages, and the District must evaluate them to determine the best cost-effective SIT method to use.

Finally, I made a presentation of the Lab's seven year study on the efficacy of several commercial pesticide products. In sum, our results showed that these mosquito control formulations do not perform as effectively as advertised. It is extremely important to know the limitations of these products for our vector control field staff to understand the duration of pesticide efficacy.

Date: March 8, 2021

Signed: *Robert F. Cummings*

Dept Mgr Signature:

*Amber Lemmon*

Print Name: Robert F. Cummings



# Orange County Mosquito and Vector Control District

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**Staff Name and Title:** Laura Krueger, Vector Ecologist

**Name of Conference/Event:** American Mosquito Control Association Annual Meeting

**Date:** March 2-5, 2021

**Location:** Virtual Annual Meeting

The American Mosquito Control Association Annual Meeting was conducted in a virtual format March 2-5, 2021. I presented an analysis of the District's adult mosquito control response to WNV during the 2020 season. The District implemented a new GRID response to WNV during the 2019 season. The presentation was titled "High, Medium, Low: Using a GRID Surveillance System to Prioritize Operational Areas for WNV Control in Orange County, CA". The analysis included 7 WNV High Risk treatment areas. Mosquito abundance was reduced in all 7 treatment blocks, mosquito infection rate was reduced in 6 of the 7 treatment blocks, and Vector Index was reduced in all 7 treatment blocks, with 3 blocks reporting 100% reduction. The results from the analysis confirmed the efficacy of the District's adult mosquito control program and support the continuation of the program in 2021. The development of the GRID surveillance system was also presented via poster by Vector Ecologist Kiet Nguyen "Geospatial Risk Identification System (GRIDS): Developing a Risk-based West Nile virus Response Grid System".

I was able to attend a multiple sessions with value to the District. It was interesting to hear updates about the Oxitec mosquito control program, the new RNA method, and other SIT methods. The technologies are very interesting pesticide free options for controlling Aedes mosquitoes over large areas. The symposiums highlighting the new mosquito control technologies were very interesting and provided a summary of the programs in the United States currently applying the technologies.

**Date:** March 8, 2021

**Signed:** Laura M. Krueger

**Dept Mgr Signature:** *Ambur Semon*

**Print Name:** Laura Krueger



## Orange County Mosquito and Vector Control District

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**Staff Name and Title:** Kiet Nguyen, Vector Ecologist

**Name of Conference/Event:** 2021 American Mosquito Control Assoc. Annual Conference.

**Date:** March 2<sup>nd</sup> to March 5<sup>th</sup>.

**Location:** Virtual Meeting

The 2021 American Mosquito Control Association (AMCA) annual conference was rich with ground-breaking research and informative regional reports. The conference consisted of multiple reports on pesticide resistance and gene expression in local mosquitoes. Additionally, other districts presented on new control techniques using unmanned aerial systems (UAS). Furthermore, this year, Orange County contributed two talks and a poster on topics ranging from multi-year efficacy testing of S-Methoprene larvicide briquettes to our own inhouse spatial risk modeling system called GRIDS.

There were many talks this year that can help shape the direction of the district for the next decade. One of the key points to this year's conference was the advancement of Sterile Insect Techniques (SIT) and how to implement release efforts in a larger scale. So far, most control agencies adopting SIT technology have treated only small areas. Moderate efficacy could be found but would require high production and constant release of treated mosquitoes.

I also attending the 20-year review of West Nile Virus in the US. The CDC contributed several talks on the need to normalize infection rates using the Vector Index. I was happy to hear this because we have been using the VI for more than 8 years. We are one of the few districts in California using the Vector Index as an infection rate threshold and a treatment trigger. We are confident that our surveillance tools line up with the recommendations of the CDC. Janet McAllister (Head of CDC Vector Borne Disease Section) also gave an inciteful review of how surveillance techniques have changed through the years and how much we have learned since the initial detection of WNV in the east coast.

This international conference is valuable to Orange County because we were able to connect with other mosquito abatement districts, who have already tested new technology that might benefit us in the future, like Sterile Insect Technique, unmanned aerial adultidicing applications, and treatment thresholds.

Date: 3/8/2021

Signed: *Kiet Nguyen*

Dept Mgr Signature: *Arubin Semron*

Print Name: Kiet Nguyen



Orange County

## Mosquito and Vector Control District

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**Staff Name and Title:** Xiaoming Wang; Research Associate

**Name of Conference/Event:** 2021 AMCA Virtual Annual Meeting

**Date:** March 2-5, 2021

**Location:** Online (Webinars and Zoom Discussion)

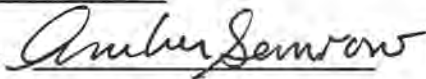
I attended the AMCA annual conference virtually from March 2<sup>nd</sup>-5<sup>th</sup>, 2021, This is my first time to attend AMCA conference, and the I learnt tremendously. Briefly:

- I was involved into two plenary keynotes, which widened my vision in the mosquito management and other public health frontiers given complicating scientific environment.
- I joined two symposiums on adult mosquito control. Talks on the applications of different repellents, pesticides and trapping methods can throw a light on our future insecticide decision making. There were also talks on insecticide resistance of *Aedes* and *Culex* mosquitoes, and some were about the genetic mechanism exploration (e.g., *kdr* mutation). These prompted the potential threat of current pesticide use, but also guided a molecular way to monitor the possible resistance. I also listened to the related ariel control symposium, which shared experiences and new for ariel spray and mosquito surveillance in different regions. I also listened to seven talks on the larval control, which gave us hints on the larvicide tests and choices.
- I was listening closely to all the presentations in two "Twenty years of West Nile Virus" symposiums. They gave a comprehensive introduction about the West Nile Virus in the US, ranging from the history and present development, and future challenge. This is a good education and training for the epidemiology and entomology (vector surveillance and control), which can benefit us a lot to better understand our task. To be noted, a talk regarding vector index (VI) was impressive and can help us better adopt in the district.
- There were five talks in the "NASA and Disease Surveillance" symposium. Those were leading techniques that we can implement in our Integrated Vector Management (IVM).
- I was involved in Laura and Bob's presentations on adult mosquito GRID program, and IGR larvicide tests, and intensively joined the Q&A session in live chats.

Overall, this conference is a great opportunity and experience to feature our work, and interact with other region districts and universities via webinars and discussions.

Date: 03/08/2021

Signed: 

Dept Mgr Signature: 

Print Name: Xiaoming Wang



## Orange County Mosquito and Vector Control District

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### Conference and Meeting Report

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**Staff Name and Title:** Michael V. Saba

**Name of Conference/Event:** 2021 Annual Virtual AMCA Meeting

**Date:** March 2-5, 2021

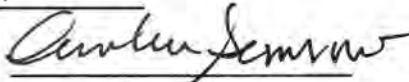
**Location:** Zoom (and other virtual platforms)

The 2021 Annual Virtual American Mosquito Control Association Meeting provided me with a sizeable overview of current mosquito and vector-related research and information. I was able to attend the following presentations, sessions, and symposia on March 2-5, 2021: President's Welcome Address, Plenary Keynote (Preventing the Next Pandemic: Vaccine Diplomacy in a Time of Anti-Science), Mosquito Lightning Symposium, Memorial Lecture Honoring Lewis T. Nielsen, Plenary Keynote (Mosquito Management in the Age of Science Denialism), Action Based Thresholds Symposium, Legislative & Regulatory Symposia I & II, Twenty Years of West Nile Virus: Past, Present and Future Symposium II, Behavior & Biology I, and Larval Control. In general, there were several significant points of value that I took from this conference, a few of which are listed here: mosquito management is undergoing sweeping changes and making great use of molecular biology and first-rate technology to do so, vector and public health agencies have maintained exceptional research and operation efforts in spite of the crippling constraints of 2020 and the COVID-19 pandemic, and maintaining effective mosquito management and outreach depends on objective fact/evidence, science, and emerging technology, yet, a moderate number of our constituents lack trust, and challenge our operations with irrational arguments, no supportive evidence, and science denialism.

While attending AMCA, I was constantly looking for ways to incorporate ideas and methodologies into my mosquitofish program, while at the same time, doing my best to just enjoy/learn what is new in the world of mosquito and vector research. I considered the following to be standout talks and networking experiences. I summarize each here, as follows: 1) Robert Peterson: Mosquito Management in the Age of Science Denialism – mosquito and vector control is a data-driven, science-based operation. Despite great advances in science and technology that provide great benefit to our society, science denialism maintains persists in the public perception, undermining and challenging the message and claim of our public health protection mission. Carefully assessing risk and repurposing the way we state our mission is critical in

elevating public trust among this faction of "science denialists." 2) Chris Barker: Making the most of mosquito and arbovirus surveillance data – since 1999, data and database tools in the age of west Nile virus have evolved from separate entities into larger, shared platforms such as VectorSurv, allowing for more efficient translation of data into evidence. Such evidence can then be more immediately and carefully evaluated, leading to more effective and accurate Integrated Vector Management decisions. 3) Conner O'Brien-Stoffa: Nasophilia in Sabethes mosquitoes: Blood host facial feeding behavior and mechanisms - I really enjoyed this talk because it focused on a mosquito species with a unique, lesser-known biting behavior called nasophilia. Nasophilia refers to females of a mosquito species biting a larger proportion of the nasal structure as compared to the entire face. Why this behavior evolved is still unclear, but this study helped to provide more evidence in support of nasophilia. 4) Networking with Young Professionals – I had the opportunity to meet and talk with eight vector control/public health staff that are new to this discipline. I was able to learn more about what these folks do and provide them further guidance, encouragement, and helpful resources. I also answered questions and addressed concerns. 5) Networking with AMCA Committees – I also took time to meet and chat with our current AMCA Committee members, learned more about active committees/priorities, and areas that require further assistance and support. We agreed that there was a deficit of biological control information being represented each year, and briefly discussed plans to address this issue. The most gratifying components of this conference were learning, networking, and the broad exposure to research conducted on a national/international level.

Following this conference, I suspect there will be many improvements to our respective programs, further evolving IVM. Guidance and updates on regulatory & legislative issues, west Nile virus data, larvicides, outreach and education, and advancements in Operations alone will help to germinate continued thinking, creativity, and solutions to ongoing vector-driven challenges. I am grateful to my Director and the District for supporting my attendance at this conference. Finally, let us not forget the astounding achievement of the AMCA for successfully making this first, all virtual 2021 Annual Conference a reality. Not even the ongoing challenges and restrictions of a pandemic could prevent this show from going on!

Date: March 8, 2021 Signed: Michael V. Saba  
Dept Mgr Signature:  Print Name: Michael V. Saba





## Orange County Mosquito and Vector Control District

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**Staff Name and Title:** Amanda Penicks, Laboratory Field Intern

**Name of Conference/Event:** American Mosquito Control Association

**Date:** 3/2/2021-3/5/2021

**Location:** Online

The annual American Mosquito Control Association was a great learning experience. As the conference was held on an online platform, the organizers were still able to provide a wide array of material for the large number of attendees.

The first day guest speaker, Peter Hotez provided insight to the COVID-19 vaccines and science and anti-science encounters in his career. The use of vaccines for a variety of diseases and ailments have greatly reduced the number of transmittable diseases such as Diphtheria, Tetanus, Pertussis, Measles, etc. There are many drivers to the emergence and spread of diseases, including COVID-19, such as poverty, war, urbanization, deforestation, political instability, climate change, and anti-science.

I was able to attend several sessions:

Genetic Isolation and Toxicological Evaluation of the L1014F kdr mutation in field collected *Culex quinquefasciatus* from Louisiana

- This session described the causes for insecticide resistance- physical causes, enzymatic, and genetic causes. He explained that the physical characteristic change was the thickening of the cuticle of the insect, this impairs the penetration of insecticides from entering the insects body. The most common reason for resistance is the enzymatic aspect where the mosquitoes are able to metabolize or able to detoxify product rendering pyrethroid or organophosphates useless. The last potential cause for insecticide resistance is genetic variations specifically phenotypic variations also known as knockdown resistance. The speaker indicated that there are numerous publications that indicated there was a correlation between the specific knock-down resistance (kdr) gene mutations and pyrethroid resistance in *Aedes aegypti*; this lead to the evaluation of the kdr gene in *Culex quinquefasciatus*.

## 20 years of West Nile Virus

- Indicates where it was found, West Nile district of Uganda, discovered in 1937. First recognized outbreaks in humans 1962 in France. The first major outbreak occurred in Romania in 1996 with over 400 cases and there were dead crows associated with that outbreak. The first outbreak in the United States occurred in 1999 in New York; it was originally thought to be Saint Louis Encephalitis. Evidence of West Nile Virus was detected from a Flamingo that died from the virus at the Bronx Zoo.

## Biology Highlights 2019

- The speaker explained an analysis of mosquito populations before and after hurricane Irma in 2017. The team of investigators theorized that the reduction of the population post hurricane was due to the tidal flushing of the eggs from breeding sites and potentially from the increased sedimentation of the area.
- There was an additional component discussing the hearing of *Aedes aegypti*. The researchers found that sound attracts mosquitoes; that they use acoustic signals during mating. It was assumed that mosquitoes have only short-distance hearing. However, with the recent study, they found that mosquitoes range was higher than expected. Mosquitoes can actually hear frequencies and intensities that match those of human conversation. Male mosquitoes can hear low intensities that most people cannot hear. During the researchers experiment, they had mosquitoes in a cage and provided sound at a specific frequency; the researcher concluded that flight was initiated by sound, that it could be short distanced or long distanced sound.

## The Weirdest of the Weird Mosquitoes of the World

- The speaker explained that there are "strange" or "weird" species across the world. For the presentation he focused on species from New Zealand. *Opifex fescus*, he considered it as the "Edward Scissorhand" mosquito due to the male's giant tarsal claws. The males of this species use their giant claws to capture pupae and wait for them (females) to emerge. *Culex rotoruae*, is a species from the volcanic zone, Rotorua and Ngawha Hot Springs, Kaikohe in New Zealand. The interesting aspect for this species is that it develops in thermal pools and hot springs. Occurs in hot springs or thermal pools that are about 37 degrees Celsius or 98 degrees Fahrenheit with a pH of 5.6-8.5. This species has year-round development due to lack of competition and predation.

## What's that smell?

- *Culex quinquefasciatus* has the preference of organically enriched water and has a preference to oviposit in this type of water. The speaker stated for his experiment that the greater the strength and odor the greater for ovipositing or egg laying. He stated they believe the mosquitoes choose this type of water because it usually predator free environment. He also stated during his experiment, that treated samples with BTI were not avoided nor detected by the mosquito species.

Date: 3/8/2021

Signed: Amanda Penicks

Dept Mgr Signature: 

Print Name: Amanda Penicks



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**Staff Name and Title:** Daisy Rangel, Ph.D., Microbiologist

**Name of Conference/Event:** AMCA

**Date:** March 2-5, 2021

**Location:** Online Conference

I participated in the AMAC online conference this year and it was a great learning experience for me. I improved my understanding of mosquito biology from the latest research that has been done throughout the world. The information I learned will increase my understanding of the deadliest animal in the world, the mosquito, and it will be useful for when interested parties or members of the public ask me, I can properly respond to their questions and concerns.

There were many other talks of great importance that related more to the work that we do at the OCMVCD. For example, NASA has great tools that we can use specifically, geographical maps that depict water and land areas on a street scale which can aid in where we set mosquito traps. The technology that has been construed in the latest year will also help determine human disease impact that we can use for our surveillance efforts. In addition, new traps that are available and their effectiveness was also of great interest for us at the District.

I was also able to connect and network with many people in the Vector world. This conference is an international one and I virtually met with scientists from all around the world. I had conversations with scientists from Latin America, specifically Mexico and Peru. I also met with scientists at the US Air Force Research Laboratory in Ohio. I was able to acquire valuable information about some of the protocols we have in our Microbiology lab. In addition, I was able to establish a partnership that will allow us to acquire positive tick samples that are contaminated with Rickettsia sp. and Borrelia sp. agents that we can use as positive controls for our PCR tests. Scientists from the continent of Africa were also present at the meeting and there were many great talks that signaled the catastrophic impacts that mosquito-borne diseases have for millions of Africans every year. Overall having this conference was important to make connections with scientists from all over the world. All in efforts to partner with each other and learn from one another to battle vector-borne diseases.

**Date:** 03/08/2021

**Signed:** 

**Dept Mgr Signature:** 

**Print Name:** Daisy Rangel



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**Staff Name and Title:** David Taylor, B.C.E., P.C.A., Q.A.L. - Research Associate

**Name of Conference/Event:** 2021 Virtual AMCA Annual Meeting

**Date:** March 01-05, 2021

**Location:** "Salt Lake, Utah" but presented on-line due to COVID-19

I found the Plenary Keynote by Dr. Hotez, extremely interesting to me as he gave a summary of the forces impacting our industry and our lives. It was enlightening to hear how so many things were connected and how many of them have developed over the years to become major issues today. I appreciated his perspective on the pandemic and found it uplifting to know that there are people working on alternative vaccines.

I really liked the information in the "NASA Earth Observations for Improved Vector-borne Disease Surveillance Symposium" presented by Dr. Jeffrey Luvall. It was brought to the attention of the participants several NASA sites for public information on land temperatures and vegetation cover that can be used to aid determining mosquito activity. There is also a tutorial website to aid users in learning how to work with the information and it's all free. I think this coupled with ground observations and our trapping results may improve our services.

The really nice thing was to see the improvement in the VectorSurv to help District analyze mosquito and disease information making it more accurate and timely. This could cut down the staff hours while increasing effectiveness of the operation. This was Chris Barker presentation

The presentation on modeling and prediction for West Nile virus considering weather, especially temperatures is a very helpful tool as shown by Justin Davis. This is another valuable asset. It appears that systems to manage data are consistently improving in accuracy and timeliness, a benefit to mosquito and disease control.

There also was a distributor, triLED™ Technology. They presented an innovative technology in the Mosquito Repellent, a light produced in an array of multi-ambiance lighting products. They said this light would repel mosquitoes out to 150'. I would like to test this light thought to confirm its effectiveness prior to recommending or purchasing.

In one presentation it was brought to the attention of attendees a newly published resource, "Mosquitoes of the World" by Daniel Strickland. This is "the definitive reference on the biology, evolution, ecology, and diversity of all known species of the world's mosquitoes. Critical for entomologists, public health professionals, and epidemiologists across the world". This will be an excellent reference for the lab as it includes recent information with pictures maps and diagrams including pictures and drawing of the adults and larvae.

This was an excellent meeting and I appreciate the opportunity provided to attend virtually.

Date: 03/05/2021

Signed: David Taylor, B.C.E.

Dept Mgr Signature: Oruh Semrow

Print Name: David Taylor, B.C.E.



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**Staff Name and Title:** Lora Young, Director of Communications

**Name of Conference/Event:** 2021 AMCA Virtual Conference

**Date:** March 2-5, 2021

**Location:** Virtual Conference

The AMCA 2021 Virtual Conference provided a unique opportunity to see multiple talks live and pre-recorded. The conference had limited networking time, however the sessions provided some valuable information on mosquito control techniques and how other districts have adapted or used new technology for mosquito control.

The two keynote speakers focused their presentations on the cultural shift as more people shift to decision making based on invalid science or beliefs that are not supported by scientific research. The focus of the first presentation was regarding how COVID response and anti-vaccine groups have shifted the norm and really impacted society. It addressed why scientific studies are no longer valued as they once were and the shift to distrust government. The second keynote speaker focused more on how this anti-science trend would affect vector control/mosquito control operations and how agencies could adapt to help inform residents. One of the key takeaway points was that words matter and how we explain, outreach and inform our residents of district operations will impact whether there is support or not. This is especially important to OCMVCD, as we explore new technologies such as sterile insect techniques and continue to use adult mosquito control in areas. Orange County has a deep seeded history in the anti-vaccine movement, which also motivates an anti-pesticide movement, with this knowledge using the correct words and techniques to inform our residents about public health, mosquito borne disease and how we conduct operations is key to the districts mission.

In addition to the keynote speakers, I was also able to attend several other sessions on how education and social media has adapted in the last few years. It was impressive to see that many districts now have a dedicated social media staff person and the

prominent role social media has played in education and outreach in the last few years. The role of social media continues to increase with new platforms coming on the market and gaining popularity, as government agencies it benefits us to communicate through these new platforms.

Another presentation focused on adapting education during COVID. Like many agencies, virtual learning became key, it was interesting to see that there was an actual increase in classes participating in virtual programs, because it eliminated the need to drive to schools. Lee county was able to increase their program capacity by teaching virtually.

Another interesting session was the use of sterile insect techniques (SIT) in the future of mosquito control. The use of Wolbachia, radiation or GMO were all discussed, and districts reported on the success of all these new techniques. The discussion also included what preparation was needed to implement these new technologies within a region. Education and outreach was one of the key components and needed to start early in order to get buy-in from residents and also make sure they were aware of the process. Due to the fact that all SIT programs require the release of male mosquitoes, there can be some confusion on why vector control districts are releasing mosquitoes instead of controlling mosquitoes. Overall, all these new SIT technologies can be very effective in controlling for mosquitoes but do require extensive outreach, education and program development prior to implementation.

Date: March 8, 2021

Signed: *Lora Young*

Print Name: Lora Young



# Orange County Mosquito and Vector Control District

*A Public Health Agency Serving Orange County Since 1947*

## Conference and Meeting Report

*Staff of the Orange County Mosquito and Vector Control District and its Board of Directors attend a variety of educational seminars, conferences and symposia annually. This report provides a brief summary of the event attended, and the organizational value of that attendance to the District.*

**Staff Name and Title:** Hester "Fritz" Petropoulos, Education Coordinator

**Name of Conference/Event:** AMCA 2021

**Date:** Week of March 01, 2021

**Location:** Virtual

Because AMCA is such a large national conference, there is a specific education forum which I was very excited to see for the first time. It was well-worth my time and it allowed me to reflect on my current practices here at OC Vector.

Placer Mosquito and Vector Control District discussed adapting their education program to a virtual format. Their original program was a school assembly which they pivoted to virtual by hiring actors and recording it and sending it to teachers. While assemblies have the potential to reach hundreds of students and I am pleased that they are doing *something*, my concern is that an assembly is passive learning. Students are not doing much and the learning stops at the end of the video. Also, there is no opportunity for discussion or questions which are advantages of having a "live" virtual speaker.

Lee County shared components of their very robust education program. Their three education staffers (yes, THREE) were able to reach over 20,000 students last year! I was pleased to see that they were using best practices in developing their programs like backwards planning, incorporation of state standards, and experiential learning to reach the students in Lee County..

The most exciting program in the session was on NASA's Globe Observer Mosquito Habitat Mapper. This application helps to educate people, to perform surveillance, and to encourage source reduction. It empowers people to find cryptic breeding sources at people's homes for which vector control does not have the time or staffing. The app is free and has people or citizen scientist, search for mosquito breeding sites. Citizen scientists use the app to locate and describe the location of the mosquito breeding and the information is uploaded to a database. This can be the entirety of the venture but there is the opportunity for the citizen scientist to do more. They can sample the source, count the larvae/pupae and upload a photo. They can also compare their photo to a pictorial key to identify the species. At the end, the final step is to instruct the citizen scientist to dump out the water, thus performing source reduction! Their data

shows that 70% of the people using the app perform this final step which is amazing! There are over 26,000 observations uploaded on the app so far and you can actually see where the data is being collected. Over 74 countries are represented by the data points! I found this application a fantastic opportunity and a wonderful complement to my existing program. I would like to make a video that explains the app and how to use it to encourage our resident to become citizen scientists to become more aware and to perform source reduction. The app is a wonderful combination of education and behavior change so I feel like it is a perfect fit for our District's mission. As we have been looking to expand our science kits and create an "advanced" version, this may be a way to incorporate technology, which kids love, into an opportunity for older students to learn and think like a scientist, while still achieving the mission of our District.

Date: March 8,2021

Dept Mgr Signature: Lora Young

Signed: Hester Petropoulos

Print Name: Hester Petropoulos





## **Conference and Meeting Report**

*Staff of the Orange County Mosquito and Vector Control District and its Board of Directors attend a variety of educational seminars, conferences and symposia annually. This report provides a brief summary of the event attended, and the organizational value of that attendance to the District.*

**Staff Name and Title:** Heather Hyland, Public Information Officer

**Name of Conference/Event:** AMCA Annual Conference

**Date:** March 2-5, 2021

**Location:** Virtual

Attending the 2021 AMCA conference was a wonderful opportunity to gain more knowledge and observe what methods other agencies are using to control the vectors within their district. I have to say every year SGV always pushes through the mundane process of the typical PowerPoint presentation and wowed the conference attendees with a modern approach to a presentation which I hope to see more of!

This year at AMCA, one of the main focal points for agencies was COVID precautions and how different agencies handled the pandemic with the resources they had. I also saw a large portion talking about GMO mosquitoes and Sterile Male research which was very interesting!

The keynote speaker, Peter Hotez from Texas Children's Hospital gave a wonderful presentation on COVID, the myths of vaccines and how to address the public that doesn't believe in scientific facts. I have heard him on several podcasts, so it was nice to see him in person on the camera speaking to us LIVE! His book "Preventing the Next Pandemic" is the next book I would like to read.

### **Highlights at AMCA:**

- 1) **WWII disease and Malaria-** I really enjoyed the symposium about Malaria during WWII. The historic pictures of the trapping systems they used and asking volunteers take oral doses of DDT was so bazaar. Learning about the first 3 types of mosquito abatement agencies that started up and proud to see CA was SECOND to start in 1915! Learning about history of WNV and groups of sheep that had birth defects- I was not aware of that issue in Utah.
- 2) **Mosquito Control is Fun! - Jillian Meek from Pasco County** conducted a wonderful presentation about useful hashtags and social media tips and tricks to use to gain followers and make the content engaging. It gave me a lot of great ideas to implement into our social media agendas.
- 3) **The Instagram Magic Touch- Pablo Cabrera** conducted a presentation about social media as well but it was a very modern presentation with music, moving graphics and fun sounds. It gave me new ideas to add to my presentations to make them more fun and interactive, Pablo also showed viewers how to measure social media platform success by using analytics which is something I really want to work on more.

- 4) Univ. of FL: Prevent/Protect Program- I thoroughly enjoyed this presentation. The amount of time and energy spent on making this program is quite awe-inspiring. The videographer and production company they hired really did a wonderful job with their vision. I walked away from that presentation with some IDEAS!

**Other highlights:**

- ***Robert Peterson also gave a stellar talk about the way we convey information – using the right words so we as Vector Control Agencies can be better understood and appreciated.***
- ***“Buzzing on a Budget” presentation- good ideas for a small budget in IVM programs***
- ***Earth observations applied to a changing world: NASA Health and Air Quality Applications- Anything NASA does is amazing***

Some cons:

- I wanted to see more Community Outreach presentations this year. The social media forum I felt wasn't enough for me. They had the Community one, but I truly feel the Science of it completely overrides the Outreach parts.
- I felt there needed to be some other type of platform for people to join everyday to connect during the presentation hours. The Q&A could have been done virtually where we could see people?
- I was constantly refreshing the page to even get the button to work for the AMCA site.

Overall, attending conferences such as AMCA enables you to interact with agencies all over AMERICA providing you with a different outlook to new and fresh ideas. The one activity I liked was the coffee breaks. I was able to see some other staff from other agencies that I have connected with throughout the years at conferences, so it was nice to connect and mingle with them virtually. I do enjoy going in person to conferences. You can better connect with other agencies and really dig into the research and programs they are doing.

Date: 3/5/2021

Signed: Heather Hyland

Dept Mgr. Signature: Lora Young

Print Name: Heather Hyland



## Orange County Mosquito and Vector Control District

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### Conference and Meeting Report

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**Staff Name and Title:** Sokanary Sun, Assistant Vector Ecologist

**Name of Conference/Event:** West Coast Rodent Academy (WCRA) 2021

**Date:** March 3-4, 2021

**Location:** Virtual Event

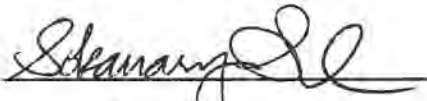
This is my first time attending the West Coast Rodent Academy, and it was so worth it! It is a two-half-day event but is still jam-packed with useful information and regulation updates. This two-day conference is something I hope the District will allow all their employees to attend in the future, especially since it counts toward Category D (Vertebrate) CEU units.

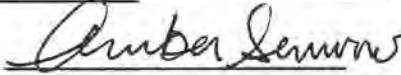
Dr. Niamh Quinn started day 1 giving a general lecture regarding rodent biology, behavior, and identification. In general, rodents pose numerous public health threats, allergens, food-borne illness, and can damage property (gnawing on wires). Rodents are difficult to control because they are very adaptive, afraid of new things (neophobic), and have insane physical abilities such as climbing, burrowing, jumping, gnawing, reaching, crawling, swim/tread water for 3 days, hold their breath for 3 minutes straight, and can collapse their ribcage to fit into a hole the size of a quarter. Rats can learn from their mothers' milk what foods are safe to eat, which can affect different types of attractants and their effectiveness. Laura Krueger, one of our Vector Ecologists at the District, thoroughly discussed the health significance of commensal and sylvatic (wild) rodents. Commensal rodents are responsible for many diseases, but to name a few, they can spread ectoparasites (mites and fleas), Lymphocytic Choriomeningitis (LCM), Leptospirosis, Tularemia, and Rat Bite Fever. Wild rodents can spread plague and Hanta Virus. Even pet rats can be the cause of disease, such as Seoul Virus. Since rodents are unlikely to would survive an attack from a rabid predator, the risk of rodents transmitting rabies to humans and others is very low. Gregg Gransie, from Target Specialty Products, ended the session with how to conduct a proper inspection with proper personal protective equipment (PPE).

Day 2 began with Ed Dolshun, the Technical Director of AP&G and Catchmaster. From his presentation, I learned that anchoring your traps can increase your capture rate, as well as reduce rodent suffering when traps are successful. I did not know that snap traps usually suffocate rodents, not break their necks, meaning their deaths are not immediate. Sylvia Kenmuir, from Professional & Specialty Solutions, gave an excellent break down of rodenticide

formulations and how to decipher things on a pesticide label and SDS. For example, two products with the same LD50 can still respond very differently, and this is due to lethality not always being linear and incremental. She also stressed that when using the word "safe", it must always come with "safe when used as directed". This is important because, you can only have zero risk, if there is no exposure. This session ends with Dr. Robert (Bobby) Corrigan from RMC Pest Management Consulting. He taught us that the COVID-19 pandemic business closures initially had a negative effect on rodents. It led to the stress of rodents, which led to rodent cannibalism, or Muricide. Rodents have rebounded since then. Globally, there has been a 15-35% increase in reports of rodent activity, and this is probably due to: increase in humans, and thus, an increase in discards and harborage, increase in homelessness, incomplete control programs, repeating mild winters, and aging building foundations and infrastructures. He went over the specifics of A.B.1788, which was passed in California, and Dr. Corrigan explains that this bill is not a complete ban on the use of rodenticides. If you read the bill line by line, there is a paragraph that allows for the use of 2<sup>nd</sup> generation rodenticides when other rodent control alternatives, including nonchemical alternatives, are inadequate to control the rodent infestation. Dr. Corrigan also informs us that there is a study that show the new COVID-19 variants can infect laboratory house mice. This means it is possible, but not definitive, that lab house mice, and possibly other commensal rodents, can spread it to others (this is not yet studied or confirmed).

Date: 3-4-21

Signed: 

Dept Mgr Signature: 

Print Name: Sokanary Sun



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**Staff Name and Title:** Kassandra Reyes, Administrative Specialist

**Name of Conference/Event:** West Coast Rodent Academy

**Date:** March 3-4

**Location:** Virtual

This was my first year attending the West Coast rodent academy and I found it to be very informative. I believe this is a conference that all our employees should attend at least once because it offers so much information to anyone who works with rodents. I was lucky enough to attend all the symposiums that the conference offered but there were a few that stood out to me.

Dr. Niamh Quinn did a presentation titled "Rodent, Biology, Behavior and ID" where I learned that rats can be born afraid of some baits/food because they picked that up from their mother while nursing. I also learned that roof rats have a home range of 25-100 ft while mice only have a home range of 10-30 ft making them harder to control. Dr. Niamh Quinn taught me a few fun facts like the Pygmy jerboa is the smallest rodent in the world, and that rats are expert swimmers with extreme stamina which allows them to swim up to 3 days straight.

Laura Krueger did a great presentation titled "Health Significance of Commensal rodents" she spoke about the diseases that can be spread through rodents like the Hanta virus and Tularemia. During her presentation I learned that 35% of people that get infected with Hanta virus will die.

Warren Hanussak did a great job explaining different methods that can be used to keep rats out of your home. Other key takeaways from this conference were that prebaiting is very important, always anchor your trap, and that placement is more important than bait. I believe that this information will be very helpful when I answer questions from the public or other agencies. I hope to attend this conference again.

**Date:** March 8, 2021

**Signed:** Kassandra Reyes

**Dept Mgr Signature:** *Ambur Semrow*

**Print Name:** Kassandra Reyes



## Orange County Mosquito and Vector Control District

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**Staff Name and Title:** David Taylor, B.C.E., P.C.A., Q.A.L. - Research Associate

**Name of Conference/Event:** West Coast Rodent Academy

**Date:** March 03-04, 2021

**Location:** "Riverside, California" but presented on-line due to COVID-19

The virtual West Coast Rodent Academy (WCRA) was a unique opportunity of lectures and discussions providing an inclusive understanding of rodent ecology, integrated pest management (IPM), rodent diseases, monitoring, trapping, exclusion tools and techniques, urban rodent survey methods, how the current COVID pandemic impacts current practices in rodent control and much more. Having been in the pest control industry for many years and taught similar information, techniques and programs to many technicians I found this program to be the next step up from just obtaining a license to perform rodent control services.

The lecture on rodent biology, behavior, and identification was good in that it broadened the scope from just dealing primarily with urban commensal rodents to include wild rodents which is critical as humans move into areas inhabited by these organisms.

Addressing diseases and health risks associated with these organisms is an important and relevant consideration. Often those who work in rodent control do not appreciate the risks to which they and their clients are being exposed. Also, service technicians rarely consider the impact their service may have in creating other problem pests such as mites, ticks, flies, fleas, ants and carpet beetles for their clients. Being able to recognize diseases and other pests and then how someone may be exposed to them and the precautions to prevent exposure will save lives and promote healthy lives.

Inspection of the site and identification of the problem pest is key to efficient control and positive results. From this point you can determine what must be done to obtain control and not create other problems. Proper use of exclusion materials and methods is extremely important. This program provides the exposure to those aspects that many workers miss. How they are implemented, installed, and where used is another point that must be appreciated.

I did notice that the use of rodenticide garnered what I thought to be a significant amount of time. While it is important to understand the products available, their modes of action, uses, safety concerns and such I thought it had a little too much emphasis. Some of that time could have been better used toward alternatives to rodenticides such as habitat modification other than typical rodenticide use and basic exclusion principles.

The session on the rules, regulations and interpretation of those is required to avoid conflicts with regulations while providing effective control results. Failure to do so means potential harm to the environment including humans.

One important point from the program was: fancy and plenty of equipment is not rodent control, it's the knowledge of the applicator and their ability to use and implement the equipment with their knowledge.

This program would be one I would recommend to anyone or any organization who has the basics, but desires to improve service performance and results and take rodent control to the next level. Also, this program will be useful to me while handling Public ID calls.

Date: 03/05/2021

Signed: David Taylor, B.C.E.

Dept Mgr Signature:

David Taylor

Print Name:

David Taylor, B.C.E.



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### Conference and Meeting Report

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**Staff Name and Title:** Amanda Penicks, Laboratory Field Intern

**Name of Conference/Event:** West Coast Rodent Academy

**Date:** 3/4/2021

**Location:** Online

I attended the West Coast Rodent Academy on March 4, 2021. It was the first time I was able to attend the conference. The material that was provided from presentations will be beneficial for the pathology work at the district.

Dr. Niamh Quinn provided insight on rodent identification and how to take pictures of specimens in the field to aid in proper identification. The tips for taking a good picture for ID include having an object for scale to aid in determining the size of the specimen. One of the major factors between native (California) rodents and commensal rodents is hair on the tail. A lot of the native species to this region have furry tails whereas other species have more-scale like tails. She went on, further explaining identifiable characteristics of common species found in California- Deer Mice, House Mice, Norway Rats, and Roof Rats. Deer mice were described having large eyes, white undersides, with well furred bicolored tails. House mice have hairless tails and no bilateral colors. Norway Rats are often confused with Roof Rats, juvenile Norway Rats are roughly the same size as Roof Rats. Norway Rats are also reddish-brown color, ears are smaller than roof rats, nearly hairless tails, and the tail is nearly the same size as the body. Roof Rats are grey in color, have large ears, nearly hairless tail, and the tail is longer than the length of the body.

Sylvia Kenmuir provided insight to the Rodenticides: modes of action, toxicity, formulations, and stations. She explained that IPM is not the prohibition of pesticides, it allows individuals to look at other tools as a pesticide alternative. Sylvia reminded us that the label of the material is law and it provides safety information and signal words, LD50, and SDS. There are several routes of exposure- oral, dermal, and inhalation. Some modes of action vary in effectiveness. In the United states there are several types of rodenticides used but, the main two categories are anticoagulants and non-coagulants. She went further in-depth to the different groups and classes of rodenticides. The Anticoagulants disrupt the recycling of Vitamin K which leads to the inability of clotting. The only means of treat for non-targeted organisms is the application of Vitamin K. Non-anticoagulants have a variety of modes of action from releasing Calcium into the

blood stream, not able to release stomach pressure, etc. There are a variety of rodenticide formulations- blocks, soft baits, soft blocks, meal/seed, pellets, tracking powder, or liquid. There are primary or direct toxicity and secondary or indirect toxicity. Primary toxicity affects pets and other non-target animals that eat a rodenticide bait that was accessible. Whereas secondary toxicity affects pets and wildlife that consume dead rodents who have ingested rodenticide.

Date: 3/8/2021

Signed: Amanda Penicks

Dept Mgr Signature: 

Print Name: Amanda Penicks





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