

**COSTA MESA SANITARY DISTRICT**

**ADMINISTRATIVE POLICIES**

**CMSD STAFF**

Date Updated: February 22, 2021

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## Costa Mesa Sanitary District

Administrative Policy No. 10.00

Date Approved: May 12, 2005

SUBJECT: PURPOSE

PURPOSE: To assist in interpreting various administrative policies

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### I. Purpose

The purpose of this policy is to establish a manual to assist all District personnel in interpreting various administrative policies that will be periodically issued by the General Manager in accordance with Section 3.02.060 of the District's Operations Code.

### II. Policy

- A. The Costa Mesa Sanitary District Staff will propose recommended Administrative Policies to the General Manager for approval and implementation. The General Manager shall be responsible for issuing and distributing all Administrative Policies.
  
- B. Approved policies will apply to and be binding on all District employees. The District will issue said Administrative Policies to each District employee.
  
- C. Administrative Policies will not supersede the District Operations Code, the District Employee Handbook or any memoranda of understanding that may be in effect.
  
- D. The Administrative Policies exist in the following categories:
  - No. 20      General Administrative
  - No. 30      Personnel
  - No. 40      Finance and Payroll
  - No. 50      Safety and Accident Reporting
  - No. 60      Citizens Advisory Committee
  - No. 70      Naming of District Facilities
  - No. 80      Public Records Act Request
  - No. 90      Website and Mobile Application Privacy Policy

These categories may be revised to meet changing needs.

**III. Effective Date**

The effective date of this Administrative Policy shall be the date first written above.



## Costa Mesa Sanitary District

Administrative Policy No. 20.10

Date Approved: May 12, 2005

SUBJECT: CUSTOMER RELATIONS

PURPOSE: Establish proper procedures for positive customer relations.

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### I. Purpose

The purpose of this policy is to outline best practices for positive customer relations.

### II. Policy

Costa Mesa Sanitary District employees are expected to be polite, courteous, prompt, and attentive to every customer. Never regard a customer's question or concern as an interruption or an annoyance. All employees must make every effort to achieve complete, accurate, and timely communications - responding promptly and courteously to all proper requests for information and to all complaints.

Never place a telephone caller on hold for an extended period. Direct incoming calls to the appropriate person and make sure the call is received. Through your conduct, show your desire to assist the customer in obtaining the help he or she needs. If you are unable to help a person requesting assistance, find someone who can.

All correspondence and documents, whether to customers or others, must be neatly prepared and error-free. Attention to accuracy and detail in all paperwork demonstrates your commitment to those with whom we do business.

When an employee encounters an uncomfortable situation that he or she does not feel capable of handling, the employee's supervisor should be called immediately for assistance. If the employee's supervisor is not available, the General Manager, or designated representative, should be called immediately for assistance. Employees should never argue with a customer. If a problem develops, or if a customer remains dissatisfied, ask your supervisor to assist in a resolution.



## Costa Mesa Sanitary District

Administrative Policy No. 20.20

Date Approved: November 7, 2012

SUBJECT: PAPERLESS AGENDA

PURPOSE: To improve operational efficiency and reduce cost for printing paper

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### I. Purpose

The primary purpose of this policy is to reduce the amount of paper needed to disseminate agenda packets to the Board of Directors and staff. In doing so, the District will improve operational efficiencies, reduce costs, and move the organization towards achieving zero waste strategies.

### II. Scope

This policy applies to District staff for preparing and disseminating agenda packets to the Board of Directors meetings as well as Board of Directors Study Sessions.

### III. Policy

In recognition of the large amount of paper used to prepare and disseminate agenda packets to the Board of Directors, the following guidelines shall be used by staff when preparing agenda packets.

1. When the agenda packet is complete, the entire packet will be uploaded on the District website using BoardDocs.
2. The District Clerk or his/her designee will send an electronic notification to subscribing members of the public and the Board of Directors that the agenda is available to download from the District's website. The message will include a direct link to download the agenda packet online.
3. Before a Board meeting begins, District staff will download the agenda packets on designated iPads for the Board of Directors and following staff members:

- a. General Manager
  - b. District Counsel
  - c. District Engineer
  - d. District Treasurer
  - e. District Clerk
  - f. Finance Manager
4. When meetings are ready to begin, the agenda packet will be available to view on said electronic tablets.
  5. At the end of the meetings, the electronic tablets will be stored in a safe that is specifically designated to store electronic tablets and the devices will be charged while not in use.
  6. The electronic tablets are to be used for public meeting purposes only. They are not to leave District premises or to be used for personal and/or private uses.
  7. Board members shall decide individually if he/she prefers to receive hard copies of the agenda packet.



## Costa Mesa Sanitary District

Administrative Policy No. 20.30

Date Approved: May 26, 2016

**SUBJECT:** EMERGENCY RESPONSE FOR HOSTILE OR VIOLENT INCIDENTS

**PURPOSE:** Establish procedures addressing the response to a potential hostile or violent event.

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### **I. Purpose**

To provide direction for the Costa Mesa Sanitary District Board of Directors and staff regarding responses to hostile or violent incidents including possible armed intruders or related threats on District facilities or properties.

### **II. Background**

The potential for hostile or violent incidents on Costa Mesa Sanitary District facilities or operational locations always exists. In recent time frames, incidents involving armed intruders have occurred in increasing frequency involving injuries and deaths at government institutions, offices and educational facilities. Often, an intruder is a person who is an ex-employee, customer or person known to the agency involved. The person often is upset at an event or person who works at the facility. However, armed intruders can be any variety of persons who have an anger situation affecting one or more staff members or other related persons to the District. Often, incidents involving armed intruders escalate to include multiple persons and potentially taking of hostages, including District customers.

Threats of these types and risks are to be considered extreme emergencies and the safety and well-being of employees and/or customers is the highest priority.

### **III. Policy**

Any evidence of the exposure to a hostile or violent person or situation on District facilities or operating areas should be taken seriously for safety purposes. Any Director or staff employee observing or sensing that a violent or hostile situation is occurring should consider taking precautionary and safety actions.

- A.** Any event resulting in awareness of a possible violent act including possible gunfire, explosion, fighting, scuffling could indicate an incident of violent potential. Any staff person observing such potential activities should take steps to protect themselves and others on the District premises including but not limited to:

- 1.** Attempt to communicate the situation to everyone in the facility by means of telephone, texting, email and/or radio

system including basic information that a potential incident is occurring. If a perpetrator(s) is seen or known, information on the person(s) should be provided.

2. When it is safe to do so, call 911
3. Since different types and levels of workplace violence may require various responses, establishing basic information on the type of event is essential. Examples are:

**a. Gunfire**

Awareness of gunfire in the facility should result in evacuation to the extent that is possible. If not possible, securing of rooms or offices and notification of others by phone or email is encouraged. Calling emergency resources via 911 is imperative once safe to call. Remain in the most secure location possible until contacted by public safety personnel or a facility supervisor, etc.

**b. Explosion**

An explosion could occur naturally or by violent intention. Awareness of an explosion or fire in the facility should result in immediate evacuation in accordance with the established evacuation plan. Response to a planned location is important to make known who is out of the facility.

**c. Physical or bomb threat**

Awareness of a telephone or in person threat to facility or staff should be met with action to evacuate and clear staff from the threatened area. Calling 911 as soon as possible is imperative.

#### **d. Situations involving hostages**

If a possible hostage incident is known, evacuation of the facility is paramount to safety of persons in the area. Contact 911 when it is safe.

#### **e. Irate customer/threat at counter or meeting**

In cases where any person acts to threaten a staff person or customer at a District facility in a manner causing fear for safety, action to summon public safety personnel by 911 should be taken. In no way should steps be taken to challenge or subdue such a person except in defense of life for self or immediate others at the facility.

#### **f. Volatile Situation at public meeting**

In the event that a volatile situation occurs at a Board of Directors or other public meeting, the person chairing/hosting the meeting should take steps to control the situation or adjourn the meeting to abate the confrontation, if possible. In event of threatening or hostile situation, call 911 immediately and proceed with evacuation or other appropriate actions. The Brown Act allows the meeting to be cleared in the event of disruption. Penal Code Section 403 makes it a misdemeanor to willfully disrupt a public meeting.

### **I. Planning for Emergency Incidents**

**A.** Steps should be taken to plan response capabilities for emergencies in addition to fires, earthquakes, etc. that may involve hostile situations. These include but are not limited to:

- 1.** Preparation of a facility evacuation plan from each room. Post the plan at each doorway and hallway exit. Have a safe area zone for staging established.
- 2.** Lock down procedures to secure the facility in a hostile or violent incident for both exterior and interior doors.
- 3.** Develop an emergency notice code for texting, email and telephone to facility and District staff. Use of a Code: Mr. Blue, is recommended.

4. Training of all personnel in dealing with customers, employees and other persons in aggravated situations and how to identify and assess potential threats or volatile situations. All employees assigned or expected to serve at the front desk or counter shall receive web based (Target Solution) training regularly.
- B. All employees shall receive training on response to violent or hostile incidents. In the event of a potential incident, notify a supervisor or the General Manager as may be possible or call 911 when an active incident is occurring. If assessment of a possible threat is needed, the General Manager or ranking staff person shall be notified for considering validity of the threat or safety risk. Public safety agency shall be contacted by 911 whenever a perceived threat is considered valid.

## **II. Actions for Violent or Armed Threat Situation**

The existence or potential for an event involving a violent person or armed intruder at a District facility should be considered an emergency condition. Actions could include up to and all of:

- A. Notify your supervisor or General Manager and other staff immediately if a threat is received but not actively in process. If validated, contact public safety by calling 911 immediately.
- B. The General Manager or ranking staff member shall evaluate the situation and consider appropriate actions including shutting down operations and evacuation and/or locking down the facility until public safety response abates the threat.
- C. Initiate notification of other facility staff of active threat by emergency code procedure. For instance, "Code blue" means contacting the Costa Mesa Police Department immediately. Evacuate the facility wherever possible. Secure money or computer equipment if time allows.
- D. Upon sighting an armed intruder, an alert to all employees should be made by page, email or telephone.
- E. Secure your work area or evacuate if safely possible. If not able to evacuate, find a safe hiding place and stay put until contacted by public safety personnel.
- F. Once outdoors after an evacuation, proceed to planned staging area to report in for identification. Inform public safety personnel of any information on the incident.
- G. Attempt to remain calm and assist others; wait for instructions from public safety or supervisory personnel.

- H. Do not attempt to look around to see what is happening. Evacuate whenever possible and with others in areas you see directly. Do not confront or attempt to apprehend a violent perpetrator unless directly attacked for self-defense. Do not assume someone already called 911, call them immediately.

### **III. Post Event Actions**

- A. Following the clear announcement of ending of a violent or hostile person situation, contact public safety or supervisory personnel for instructions. Report any knowledge or firsthand observations of the incident. Contact your family and immediate friends so they will not take any actions to respond unnecessarily. Await direction as to return to work or other steps dependent on level of the incident. If not able to do so, consult with your supervisor or notify the ranking person on-site.
- B. An Emergency Response Coordinator, or designated representative, shall evaluate and debrief any major incident and to take needed steps to abate the conditions after the event and prepare as necessary for continued operations. Planning and actions to address conditions are expected and your input is important via your supervisor. There may be the potential to lock-down or close the facility from operating for some time or corrective steps. If deemed needed, seek direction on what actions you should take to assist in procedure.



## Costa Mesa Sanitary District

Administrative Policy No. 20.40

Date Approved: April 5, 2012

**SUBJECT:** REWARDING IDEAS PROGRAM

**PURPOSE:** To encourage employees to generate ideas for organization improvements

### **I. Purpose**

To establish District procedures for an employee suggestion program encouraging employees to generate ideas for organizational improvements and providing a system for answering and recognizing adopted ideas.

### **II. Policy**

Costa Mesa Sanitary District supports a work environment that encourages participation, innovation, and organizational improvement. The District encourages the use of the Rewarding Ideas Program which furnishes a process for submitting cost saving ideas to District Management. The program is designed to encourage employees who are active at the time of submission through the time of award, to take an increased interest in District operations and to generate cost saving ideas. The Rewarding Ideas Program is administered by the District's Administrative Services Manager.

The General Manager will provide recommendations to the Board of Directors for monetary awards to employees. The General Manager has the exclusive right to establish award policy and structure of the suggestion system. This includes the right to amend the system at any time with due notice of change. All suggestions become the exclusive property of the District and shall not form the basis of a future claim upon the District by the suggester/employee, his/her heirs, successors or assigns, including suggestions that are subsequently patented.

### **III. Authority and Responsibility**

Every District employee on active payroll status at the time of submission through the time of award of a suggestion will be eligible to receive awards with the exception of the following: Members of the Board of Directors, the General Manager, Administrative Services Manager, Finance Manager contract staff, temporary employees, and interns.

### **IV. Procedures**

#### **1. Suggester**

Suggestion forms may be obtained from the District's Administrative Services Manager. The suggester should read the instructions on the suggestion form, fill the form out completely and carefully, and then return it to the Administrative Services Manager. The suggester should retain a copy for his or her own records.

## **2. Administrative Services Manager (HR & Risk Management)**

- a. The Administrative Services Manager will date stamp the suggestion form when received. The Administrative Services Manager will prepare in advance all information required to expedite processing of the suggestion. In addition, the Administrative Services Manager will assure that each suggestion is fairly and thoroughly investigated and reported upon. The Administrative Services Manager will also request further information and investigation if rejection of a suggestion is questioned by the General Manager.
- b. To be eligible for an award, the suggestion must be adopted and implemented to accomplish one or a combination of the following:
  - Save material, supplies, money, space, time, or labor;
  - Improve service, safety conditions, or morale;
  - Improve methods, procedures, or equipment, resulting in increased output and/or efficiency; or,
  - Eliminate unnecessary procedures, records and forms.

Suggestions not eligible for award are:

- Propositions which call attention to a problem but do not propose an acceptable solution.
  - Those dealing with normal maintenance, unless such suggestions contribute to a solution of maintenance problems.
  - Those dealing with salary adjustments, employee benefits and job classification.
  - Those not original with the suggester, or those submitted for an ineligible suggester.
  - Those which are duplications of suggestions submitted within the last 24-month period.
  - Those submitted over 90 days after implementation of the suggestion.
  - Those that contain an idea already under active consideration by the District.
  - Those which are within the job responsibility of the suggester.
  - Those that deal with hours and other terms and conditions of employment.
  - Suggestions that do not relate to District nor fall within the authority or responsibility of the District or would require statutory change in the law.
- c. The Administrative Services Manager will be responsible for internal marketing and administration of the Rewarding Ideas Program. The

Administrative Services Manager brings the suggestion to the attention of the General Manager for review and provides linkage between the suggester and the evaluation process. In addition, the Administrative Services Manager monitors the evaluation process to ensure completion within 45 business days of receipt of the suggestion.

- d. The Administrative Services Manager shall ensure the fair and careful review of suggestions submitted by employees in a timely manner. The Administrative Services Manager shall call upon additional resources from other departments, Finance, as needed. Evaluation of the suggestion will begin with initial determination that it is legal and safe. The Administrative Services Manager will then determine whether the suggestion has the potential to save money, generate revenue, reduce or eliminate waste, provide better customer service, save time, improve morale and/or productivity.
- e. Based upon this analysis, the Administrative Services Manager will complete a Suggestion Evaluation form with a recommendation to accept or decline the suggestion. The form shall indicate whether or not the suggestion is feasible and cost effective, has been adopted, any actual or estimated reduction of expenditures made possible by the suggestion, or reason for its rejection. The Administrative Services Manager will return the Evaluation form to the General Manager within 22 days of receiving the suggestion. If the suggestion is deemed not feasible for implementation, the suggester will receive a copy of the evaluation.

### **3. Finance Manager**

The Administrative Services Manager will forward the suggestion to the Finance Manager who will analyze any tangible savings in light of the current budget. The Finance Manager will attest to the accuracy of amounts saved by signing the Suggestion Evaluation form. The Finance Manager will then return the completed form to the Administrative Services Manager. Note: All evaluations must have the signatures of the Administrative Services Manager and the Finance Manager along with the reward recommendation.

### **4. General Manager**

The General Manager will review the Administrative Services Manager evaluation and determine if an award should be made. If the suggestion is acceptable and meets the criteria for an award, the General Manager will recommend to the Board of Directors that the suggester receive an award. The Administrative Services Manager will notify the suggester that the suggestion and award has been recommended for approval.

## **5. Board of Directors**

- a.** Upon receiving a recommendation from the General Manager, the Board of Directors shall consider the recommendation and approve it unless, after investigating the operation of the suggestion, the Board determines the recommendation is not in accordance with the provisions of the Program in which event the Board shall direct the General Manager to reanalyze the suggestion and make a new recommendation. Upon approval by the Board of Directors, the award, if any is recommended, shall be made at a Formal Board Meeting.
- b.** Suggestions will be determined “closed” but not “declined” if the Administrative Services Manager is unable to determine an approximate implementation/adoption date within 12 months of evaluation of the suggestion (i.e., due to budgetary constraints). The suggester may retain ownership of the suggestion by resubmitting the idea within one year and thirty days of notification. The suggestion must be resubmitted on a new form referencing the original suggestion control number.

## **V. Reward Levels**

If a suggestion is determined to provide a tangible benefit from either additional revenues or savings in materials, equipment, overhead or deleted positions, a cash award of 20% of the first year’s revenues/savings may be awarded to the suggester. In no event will the monetary award to any one suggestion exceed \$1,000 or be less than \$100.

If a suggestion provides intangible benefits to a department, a certificate of commendation or a cash award up to \$100 may be awarded to the suggester. These intangible benefits may include time savings, improved morale, improved customer service, etc. for which monetary values cannot be determined.



## Costa Mesa Sanitary District

Administrative Policy No. 20.50

Date Approved: May 26, 2016

**SUBJECT:** SAFETY AWARD FOR EXCELLENCE

**PURPOSE:** To celebrate employees who excel in creating and maintaining a safe and healthy workplace

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### **I. Purpose**

To establish a District recognition program celebrating employees who excel in creating and maintaining a safe and healthy workplace by encouraging peers to recognize one another for a job well done.

### **II. Policy**

Costa Mesa Sanitary District is committed to safety. This commitment is largely dependent on the willingness of every individual to pursue a safe, healthful, and environmentally sound workplace.

### **III. Authority and Responsibility**

Every District employee on active payroll status at the time of nomination will be eligible to receive awards with the exception of the following: Members of the Board of Directors, the General Manager, contract staff, temporary employees, and interns.

### **IV. Procedures**

#### **1. Employee Nomination**

Nomination forms may be obtained from the District's Administrative Services Manager. The nominator should read the instructions on the nomination form, fill the form out completely and carefully, and then return it to the Management Analyst II through interoffice mail.

#### **2. Administrative Services Manager**

- a. The Administrative Services Manager will compile all nominations and evaluate them against the eligibility criteria. The Administrative Services Manager will also request further information and investigation if rejection of a nominee is questioned the General Manager.

- b.** To be eligible for an award, the nominee must satisfy at least 1 or more of the 5 criteria listed below:
- Implementing a safety program for their division
  - Taking an active role and being a strong advocate of safety and health
  - Demonstrating significant improvement over previous conditions
  - Consistently maintaining a good safety program over a number of months
  - Making an extra effort to improve or correct a specific aspect of safety within the workplace
- c.** Administrative Services Manager will be responsible for internal marketing and administration of the Safety Award for Excellence Program. The Administrative Services Manager will compile a list of eligible nominees and an award recipient will be chosen at the monthly staff meeting.
- d.** The award recipient for the month will be automatically eligible for the annual Safety Person of the Year drawing.

## **V. Reward Levels**

The monthly Safety Award for Excellence winner will receive recognition at the monthly staff meeting and a small gift from the District.

The annual Safety Person of the Year award winner will receive recognition at the annual awards banquet and a plaque or trophy.



## Costa Mesa Sanitary District

Administrative Policy No. 20.60  
Approval Date: November 29, 2018

**SUBJECT:** PERFORMANCE MEASUREMENT PROGRAM

**PURPOSE:** Develop a method for analyzing organizational performance and collaborating towards continuous improvement of performance in an open and transparent manner.

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### **I. Purpose**

To establish methods and procedures for gathering and analyzing performance data for the purpose of improving internal and external communications, demonstrating evidence of program effectiveness, justifying programs and their costs, enhancing public accountability, and collaborating with stakeholders towards continuous performance improvement in an open and transparent manner that will lead to building public trust.

### **II. Policy**

A good set of performance measures is an important tool for building accountability throughout the organization. By developing key performance measures, District supervisors and managers can confirm that employees are meeting expectations and delivering high quality services.

The District's Performance Measurement Program analyzes the performance of several service areas within the following six attributes:

1. Efficiency
2. Effective Workforce
3. Customer Satisfaction
4. Cost Effectiveness
5. Citizen Engagement
6. Transparency

The service areas being measured and analyzed within the six attributes include risk management, wastewater operations, code enforcement, solid waste operations, records retention, plan check, finance, personnel, social media, etc. These measures will allow supervisors and managers to identify operating strengths and weaknesses, target areas of improvement, and recognize improvements when they occur.

### III. Definitions

1. Performance Measurement – Regular measurement of outcomes and results, which generate reliable data on the effectiveness and efficiency of programs and services.
2. Input Measures – Resources that are put into a process in order to achieve an output such as labor, capital equipment, and/or raw materials. Examples: Hours paid to employees or expenditures for special programs.
3. Output Measures – Calculation, recording, or tabulation of the results of an activity, effort or process that can be expressed in numbers. Examples: Number of phone calls received in the front office or number of engagements on social media.
4. Efficiency Measures – The relationship between resources used and services produced. Sometimes this relationship is expressed in terms of unit costs. Examples: Cost per mile of wastewater pipes cleaned or staff hours per sewer permit issued.
5. Outcome Measures – Gauge the quality of services and the extent to which the objective is being achieved. Examples: Citizen Satisfaction rating or number of sanitary sewer overflows per 100 miles of sewer pipe.
6. Performance Management Team – District management employees responsible for gathering and analyzing performance data and making suggestions for performance improvements. The Performance Management Team consists of the General Manager, Finance Manager, District Clerk, Wastewater Maintenance Superintendent, Management Analyst II (personnel & risk management), Management Analyst II (community outreach) and Management Analyst I (solid waste). The General Manager has the authority to remove and/or add employees to the Team.

### IV. Procedures

1. The General Manager will create a Performance Management Team that will focus on achieving the following objectives:
  - a. Developing performance measurement outcomes that are meaningful
  - b. The data obtained is defensible
  - c. The measures are:
    - i. Short and concise
    - ii. Easy to read and understandable
  - d. On-going monitoring

2. When developing performance measures the measures must tie directly to the District's Strategic Plan.
3. Performance measurements will be used to determine the cost effectiveness of District programs along with internal and external services.
4. A. The Performance Management Team will meet quarterly to review performance data and projected outcome of service areas by asking the following questions:
  - What happened?
  - Why did it happen?
  - How did it happen?
  - Was this the most efficient use of resources?
  - How effective was the effort?
  - How can the District improve on the results?

B. If outcomes are not being met, the Team will provide a narrative in the performance measurement report describing why the outcome is not being achieved.
5. Graphics, color coding and/or dashboards will be used to highlight performance above/below expectations or varying significantly from past or comparable data.
6. District employees will be responsible for capturing and maintaining performance data and may use various resources to capture and maintain such data including, but not limited to computerized maintenance management systems, surveys, citizen relationship management software, Microsoft software, etc.
7. New District employees will learn about performance management concepts and processes from their supervisor as part of their New Hire orientation.
8. During the budget development process, departments will be required to include performance data along with their budget proposals to justify increased expenditures from years past.



## Costa Mesa Sanitary District

Administrative Policy No. 30.00

Date Updated: May 12, 2005

SUBJECT: PERSONNEL

PURPOSE: To direct staff to the appropriate document related to personnel matters

### I. Purpose

The purpose of this regulation is to establish a manual to assist in interpreting various personnel rules, regulations, and policies the General Manager will issue in accordance with the Operations Code Section 3.02.060.

### II. Policy

- A. The Costa Mesa Sanitary District Staff will propose recommended Personnel Policies to the General Manager for approval and implementation. The General Manager shall be responsible for issuing and distributing all Personnel Policies
  
- B. Approved policies will apply to and be binding on all District employees. The District will issue said Personnel Policies to each District employee through regular updates of the adopted Employee Handbook.

### III. Effective Date

The effective date of this Administrative Policy shall be the date first written above.



## Costa Mesa Sanitary District

Administrative Policy No. 40.10

Date Approved: May 12, 2005

SUBJECT: CONTRACT ADMINISTRATION

PURPOSE: To establish consistent procedures for administration of all contracts/agreements

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### I. Purpose

The purpose of this regulation is to establish consistent procedures for administration of all contracts/agreements (Professional Services, Consultant Services, Architect and Engineer Services) between the District and all private, public and non-profit agencies. This policy does not include sewer projects, which are governed by the "State of California Public Contract Code."

### II. Procedure:

- A. All contracts/agreements for services rendered will be in writing and approved "as to form" by the District Counsel. District Risk Manager will verify contractor provided proof of insurance in compliance with CMSD Operations Code 7.05.030(i). Each contract/agreement will identify the name and classification of the Project Manager.
- B. The General Manager will assign projects to appropriate staff, designated as the Project Manager, responsible for contract/agreement preparation, execution, renewal, performance evaluation, progress reporting and contract payment. The project manager will have a working knowledge of all applicable rules and regulations pertaining to contract procedures.
- C. All contract agreements will require prior authorization from the General Manager or Board of Directors depending on the dollar value of the agreement. **Purchasing, Exceptions, Signatures, Change Orders and Ratification requirements and thresholds are established in Chapter 4.04 of the CMSD Operations Code.**
- D. The District Clerk or his/her designee shall file the originals of all duly executed agreements/contracts, including approved insurance certificates and all Exhibits. Originals of all duly executed agreements/contracts, including approved insurance certificates, are to be filed with the District Clerk and a copy attached to the initiating Purchase Requisition
- E. The Project Manager shall manage assigned agreements/contracts and recommend appropriate performance progress payments consistent with

contract payment milestones, renewals, revisions, bond or insurance renewals or change orders or terminations at least 60 days prior to the expiration date (unless specified otherwise in the contract) and within the terms of the agreement/contract. Notification as to the changed status of the agreement/contract will be in writing to the Finance Manager.

**F. The District or the Contractor may initiate Change Orders.**

1. In the case of Contractor initiated requests for Change Orders, the Project Manager shall verify whether the contract prerequisites have been met for justification of the Change Order.
2. The project manager will verify availability of funds with the Finance Manager prior to submitting a change order. The change order shall identify the reason for the change order and a recommendation, source of funds and a budget adjustment when funds are not available.
3. The General Manager shall have the authority to approve change orders in compliance with Operations Code Section 4.04.060(e)
4. Following General Manager or Board approval, Finance will issue a written Purchase Order to the agreement/contract.

**III. Effective Date**

The effective date of this Administrative Policy shall be the date first written above.



## Costa Mesa Sanitary District

Administrative Policy No. 40.20

Date Approved: May 12, 2005

**SUBJECT:** REAL PROPERTY ACQUISITION

**PURPOSE:** To establish uniform guidelines for the purchase of District property

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### **I. Purpose**

This procedure establishes uniform guidelines for the purchase of District property subsequent to approval in the annual budget. This procedure applies to properties purchased for public facilities, and other Capital Improvement projects. This procedure also applies to property the Board approves outside of the normal budgetary process.

### **II. Policy:**

#### **a. General:**

- A.** The General Manager or his/her designee will be responsible for developing a comprehensive schedule for design, appraisal and acquisition of right of way, award of bid, manpower, potential issues and construction.
- B.** The General Manager or his/her designee will determine the property to be acquired, rationale for the acquisition and financial limitations for the acquisition and fully coordinate the project with the District Treasurer and Finance Manager. The General Manager will submit a recommendation schedule, budget and funding source(s) to the Board of Directors for approval.
- C.** The General Manager will determine the availability of the Real Property subject to Board of Directors approval. The General Manager will notify the Real Property Agent of the property to be acquired and provide the budget limitations. The General Manager will submit all pertinent correspondence regarding the progress of real property negotiations to the Board of Directors.
- D.** The General Manager will be responsible for selecting the appraiser to be used and for approval of all appraisal contracts. Once the appraisal report is accepted, the General Manager and Real Property Agent will establish an acceptable time schedule for negotiations (typically 30-45 days maximum, unless the Board of Directors approve a time schedule longer than 45 days).

**b. Acquisition by Negotiation:**

- A.** Under the direction of the General Manager, the Real Property Agent will negotiate for the purchase of the project.
- B.** The District Counsel will be responsible for legal advice, opinions and documents as required for the acquisition. All requests and responses will be fully documented.
- C.** The General Manager will submit the negotiated price and support documents to the District Board of Directors in a publicly noticed closed session meeting.
- D.** The Board of Directors , in coordination with the General Manager, District Counsel, Finance Manager and District Treasurer, will determine the escrow terms and escrow closing date after considering cash availability and will notify the Real Property Agent of the approved escrow closing date. Following District Counsel review, the General Manager shall provide written authorization approving the terms of each escrow.
- E.** The Board of Directors will approve a warrant for deposit in escrow.
- F.** Following District Board of Directors approval, the Real Property Agent will transmit District obligations under the terms of the escrow agreement and ensure all necessary documents are recorded.

**c. Acquisition by Condemnation Lawsuit:**

- A.** Under Board of Directors direction, the Real Property Agent will submit all necessary documentation to the District Counsel and the General Manager.
- B.** The District Counsel will prepare or approve all documentation necessary for public hearings. The General Manager or his/her designee will ensure all required documentation is available for the public hearing.
- C.** The District Board of Directors shall delegate the specific authority to the District Counsel to culminate the acquisition of the property when the District Board adopts the Resolution of Necessity to Condemn.
- D.** After the condemnation lawsuit is filed, the District Counsel will keep the General Manager and the Real Property Agent advised on:
  - 1.** Any changes in District appraisal of the property, and
  - 2.** The amount of all demands by the property owner and any other persons entitled to payment.

- E. Under direction of the General Manager and following judgment or settlement in the condemnation lawsuit, the Real Property Agent will be responsible for recording the necessary document, obtaining title insurance if required, and taking any other steps needed to effectuate transfer of title to the District.

**d. Relocation**

The General Manager or his/her designee will be responsible for coordinating any relocation assistance as applicable and adhere to all applicable City, State and Federal relocation assistance guidelines.

**III. Effective Date**

The effective date of this Administrative Policy shall be the date first written above.



## Costa Mesa Sanitary District

Administrative Policy No. 40.30

Date Approved: May 12, 2005

SUBJECT: PETTY CASH POLICY

PURPOSE: To establish a policy and procedure for the process by which petty cash can be obtained, used, replenished, and audited

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### I. Purpose

The purpose of this policy/procedure is to describe the process by which petty cash can be obtained, used, replenished, and audited.

### II. Scope

Petty cash may be required to pay for incidental services and purchases. This policy defines the petty cash request and approval process and the process by which funds shall be maintained and replenished.

### III. Responsibility Assignments

- A. Primary responsibility for updating this policy rests with the General Manager.
- B. The Department managers hold primary responsibility for approving petty cash requests and for implementing and assuring compliance with this policy/procedure.
- C. Each employee is accountable for accurately completing the petty cash request, obtaining proper approval, safeguarding the obtained cash, and providing documentation (such as a receipt) for the use of funds.
- D. Finance is responsible for authorizing the replenishment of petty cash funds and overseeing audits of petty cash.
- E. Finance is responsible for processing the transactions through Accounts Payable and posting to the general ledger account indicated on the petty cash receipt.
- F. Petty Cash Custodian is accountable for safeguarding the petty cash he/she control, properly distributing the petty cash, and requesting reimbursements.

## VI. Procedure

### A. General

1. Petty cash box shall be protected from misappropriation and theft by keeping it locked when not in use and stowing it in a secure area such as locked drawer. Physical access to the cash and cash receipt records shall be limited to the Petty Cash Custodian.
2. Petty cash funds will not be given to persons who are not employees of the District.

### B. Disbursements

1. Petty cash disbursements are limited to **\$100.00** or less.
2. The District employees in need of petty cash funds must:
  - a) Accurately & completely fill out a Petty Cash Request in ink. The Petty Cash forms can be found in the District Public drive in the Petty Cash file.
  - b) Obtain an approval and general ledger Account (charge-to-account) on the Petty Cash Request from the employee's department manager.
  - c) Attach documentation of expenditures (receipts) to the Petty Cash Request, if the request is a reimbursement.
  - d) Present the Petty Cash Request to the Petty Cash Custodian and sign the Petty Cash Request upon receipt of monies.
3. Petty Cash Custodian will sign on the Petty Cash Request after the employee has received the funds to which he/she is entitled.
4. General Manager and department managers need dual signatures and cannot approve their own petty cash request.
5. After receiving a cash advance, employees are responsible for providing documentation (such as a receipt) and returning the change within five (5) business days of the receipt of the funds.

Petty Cash Custodian shall inform the employee's department manager whenever an employee fails to turn in receipt(s) or change within the required period.

6. Under no circumstances will additional funds be given to any employee who has failed to turn in receipt(s) and change from a previous cash

advance. Failure to turn in receipts may result in disciplinary action, including loss of the privilege of using petty cash.

7. Petty Cash may be obtained for ultimate distribution to another authorized party (such as a seminar attendee). The employee receiving the cash from the Petty Cash Custodian signs the petty cash request as he/she receives the funds from the Custodian. The ultimate recipient of the funds must sign a receipt as proof he/she received the funds. The receipt, which could be a duplicate petty cash request, must be given to the Petty Cash Custodian within five (5) business days.

### **C. Petty Cash Control Sheet**

The Petty Cash Custodian shall maintain records of the use of petty cash by keeping the Petty Cash requests and recording all transactions on the Petty Cash Control Sheet Immediately upon receipt or disbursement of petty cash. The amount of cash in the Petty Cash Box should always equal the current balance on the Petty Cash Control Sheet.

### **D. Replenishment**

1. The Request for Petty Cash Replenishment, Petty Cash requests (includes cash register receipt or other documents) Petty Cash Control Sheet and Petty Cash Drawer are turned-in by the Petty Cash Custodian to Finance for review, audit of petty cash drawer funds, and approval at the end of each month or when the balance of cash in drawer falls below \$100.
2. The approved Petty Cash Replenishment Request is forwarded to Accounts Payable for processing as part of the next regularly scheduled cash disbursement. Finance will present the check to the bank for payment and deliver the cash funds to the Petty Cash Custodian. The Petty Cash Custodian will acknowledge receipt of funds with his/her signature on the Request for Petty Cash Replenishment form.

## **E. Audits**

- 1.** Any Discrepancy in daily balancing must be reported to the General Manager immediately, who shall investigate and take appropriate action.
- 2.** Finance shall audit the petty cash via the Petty Cash Control Sheet at his/her discretion, but not less than twice a year. The amount of cash in the cash box should always equal the amount on the Petty Cash Control Sheet.



## Costa Mesa Sanitary District

Administrative Policy No. 40.35

Date Approved: August 24, 2020

**SUBJECT:** PETTY CASH POLICY- EMERGENCY OPERATING CENTER (EOC)

**PURPOSE:** To establish a policy and procedure for the process by which petty cash for emergency operating center (EOC) can be obtained, used, replenished, and audited

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### **I. Purpose**

The purpose of this policy/procedure is to describe the process by which petty cash can be obtained, used, replenished, and audited during an emergency.

### **II. Scope**

Petty cash may be required to pay for incidental services and purchases during an emergency. This policy defines the petty cash request and approval process and the process by which funds shall be maintained and replenished. There is \$10,000 petty cash total with \$5,000 being kept in each safe (one at Headquarters and one at District Yard) for only emergency purposes. The General Manager and the Finance Manager have the combination to the safe and the lock box which is kept in the safe.

### **III. Responsibility Assignments**

- A.** Primary responsibility for updating this policy rests with the General Manager.
- B.** The Management/EOC Director hold primary responsibility for approving petty cash requests and for implementing and assuring compliance with this policy/procedure.
- C.** Each responder (employee) is accountable for accurately completing the petty cash request form, obtaining proper approval, safeguarding the obtained cash, and providing documentation (such as a receipt) for the use of funds.
- D.** Finance is responsible for authorizing the replenishment of petty cash funds and overseeing audits of petty cash.
- G.** Finance is responsible for processing the transactions through Accounts Payable and posting to the general ledger account indicated on the petty cash receipt.

- H. Finance is accountable for safeguarding the petty cash he/she control, properly distributing the petty cash, and requesting reimbursements.

## VI. Procedure

### A. General

1. Petty cash box shall be protected from misappropriation and theft by keeping it locked in the safe, only be use in case of emergency. Physical access to the cash and cash receipt records shall be limited to Finance.
2. Petty cash funds will not be given to persons who are not employees of the District.

### B. Disbursements

1. Petty cash disbursements are limited to **\$500.00** or less. The Management/EOC Director has the authority to approve petty cash disbursements more than \$500.
2. The responders in need of petty cash funds must:
  - a) Accurately & completely fill out a Petty Cash Request Form in ink. The Petty Cash forms can be found in the District Public drive in the Petty Cash file or request from Finance.
  - b) Attach documentation of expenditures (receipts) to the Petty Cash Request Form, if the request is a reimbursement.
  - c) Present the Petty Cash Request to Finance and sign the Petty Cash Request Form upon receipt of monies.
3. Finance will sign on the Petty Cash Request Form after the responder has received the funds to which he/she is entitled.
4. Managers/EOC Director and Finance need dual signatures and cannot approve their own petty cash request.
5. After receiving a cash advance, the responder is responsible for providing documentation (such as a receipt) as soon as possible.

Finance shall inform the employee's department manager whenever an employee fails to turn in receipt(s) or change within the required period.

6. Under no circumstances will additional funds be given to any responder who has failed to turn in receipt(s) and change from a previous cash advance. Failure to turn in receipts may result in disciplinary action, including loss of the privilege of using petty cash.

### **C. Petty Cash Control Sheet**

Finance shall maintain records of the use of petty cash by keeping the Petty Cash requests and recording all transactions on the Petty Cash Control Sheet immediately upon receipt or disbursement of petty cash. The amount of cash in the Petty Cash Box should always equal the current balance on the Petty Cash Control Sheet.

### **D. Replenishment**

1. The Request for Petty Cash Replenishment, Petty Cash requests (includes cash register receipts or other documents) Petty Cash Control Sheet and Petty Cash Drawer are processed by Finance as soon as the emergency incident is over.
2. The Petty Cash Replenishment Request is forwarded to Accounts Payable for processing as part of the next regularly scheduled cash disbursement. Finance will present the check to the bank for payment and deliver the cash funds to the Finance Manager. The Finance Manager will acknowledge receipt of funds with his/her signature on the Request for Petty Cash Replenishment form.

### **E. Audits**

1. Any discrepancy in balancing must be reported to the General Manager immediately, who shall investigate and take appropriate action.
2. Finance (The Accountant), shall audit the petty cash via the Petty Cash Control Sheet quarterly. The amount of cash in each of the cash box (2) should always equal \$10,000.



## Costa Mesa Sanitary District

Administrative Policy No. 40.40

Date Approved: May 26, 2016

**SUBJECT:** PURCHASING POLICY

**PURPOSE:** To provide District staff and consultants with policies and procedures to be used in the purchase of supplies, services, and equipment

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### **I. Purpose**

The purpose of this regulation is to establish a manual to provide District staff and consultants with policies and procedures to be used in the purchasing of supplies, services, and equipment while maintaining fiscal responsibility in the procurement process. All policies and procedures set forth in this manual are designed to insure that procurements are being accomplished in a timely, efficient manner at the most economical cost to the taxpayers.

### **II. Policy**

- A. The District Board of Directors adopted the purchasing policies and procedures as set forth in Title 4, Chapter 4.04 of the District's Operations Code on October 26, 2010. The Purchasing Ordinance begins on page 37 of the Operations Code.
- B. Finance is responsible for periodic updates to the Purchasing Policy.
- C. Approved policies will apply to and be binding on all District employees.

### **III. Procurement Ethics Standards**

The Costa Mesa Sanitary District (CMSD) subscribes to the following Procurement Code of Ethics:

- A.** Give first consideration to the objective and policies of CMSD.
- B.** Strive to obtain maximum value for each dollar of expenditure.
- C.** Demand honesty in sales representatives whether offered through verbal, written statement, advertisement or sample product.
- D.** Refuse to accept any form of commercial bribery and prevent any appearance of doing so.
- E.** Grant all bidders/proposers equal consideration; regard each transaction on its own merits; foster and promote fair, ethical and legal trade practices.

- F.** Conduct ourselves with fairness and dignity, and demand honesty and truth in the purchasing and contracting process.
- G.** Ensure that all potential bidders/proposers are provided with adequate and identical information upon which to base their submittal.
- H.** Conduct business with potential and current contractors and vendors in an atmosphere of good faith, devoid of intentional misrepresentation.
- I.** Make every reasonable effort to negotiate an equitable, verifiable and mutually agreeable settlement of any costs, insofar as the established policies of CMSD and the law permit.
- J.** Never allow identical goods or services to be split or variations to the Board of Directors approvals to be made in order to circumvent established delegations.

#### **IV. Effective Date**

The effective date of this Administrative Policy shall be the date first written above.



## Costa Mesa Sanitary District

Administrative Policy No. 40.50  
Approval Date: August 24, 2020

**SUBJECT:** ENVIRONMENTALLY PREFERABLE PROCUREMENT

**PURPOSE:** To ensure the District purchase recycled and other environmentally preferable products whenever the products meet the District's fiscal, environmental and performance goals.

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### **I. Purpose**

The Costa Mesa Sanitary District recognizes its responsibilities to minimize negative impacts on community health and the environment. The District further recognizes that the products and services the District buys have inherent environmental and economic impacts and that the District should make procurement decisions that embody, promote and encourage the District's commitment to protecting the community's health and the environment and support sustainability goals adopted by the Board of Directors. The purpose of this policy is to:

1. Encourage the purchase and use of materials, products and services that best align with the District's fiscal, environmental and performance goals; Reduce the spectrum of environmental impacts from District use of products, including reduction of greenhouse gas emissions, energy use, reduction of landfill waste, health and safety risks, and resource consumption; or contractor to procure goods or services that do not perform adequately for their intended use, exclude adequate competition, or are not available at a reasonable price in reasonable period of time. Decisions regarding adequacy or suitability for use shall be at the discretion of the General Manager.

### **II. Policy**

1. The District shall acquire goods and services in a manner that integrates both fiscal responsibility and environmental stewardship. District employees shall comply with this policy and actively encourage decisions that reflect the policy objectives stated herein. Procurement shall actively promote and encourage product and service acquisitions compliant with the policies and guidelines adopted herein.

#### **2. Factors**

Environmental factors to factors to be considered in product and service acquisitions include, but are not limited to, the assessment of:

- Pollutant releases and toxicants, especially Persistent Bioaccumulative Toxics (PBTs), other chemicals of concern, air emissions, and water pollution;
- Waste generation and waste minimization;
- Greenhouse gas emissions;
- Recyclability and recycled content;
- Energy consumption, energy efficiency, use of renewable energy;
- Depletion of natural resources;
- Potential impact on human health and the environment;
- Impacts on biodiversity;
- Total Life Cycle Costs

When determining if a product is environmentally preferable, the following sample environmental attributes should be considered:

- Biobased, Biodegradable, Bisphenol-free;
- Carcinogen-free, Chlorofluorocarbon (CFC)-free, Compostable;
- Durable;
- Energy efficient;
- Flame retardant-free (especially halogenated flame retardants), free of antimicrobial chemicals;
- Heavy metal free (e.g. no lead, mercury, cadmium);
- Less hazardous, low Volatile Organic Compounds (VOC) content, low toxicity, made from renewable materials;
- Per and Poly Fluoroalkyl-free, phthalate-free;
- Reduced packaging, refurbished, reusable,
- Water efficient

### 3. Third-Party Certifications

Where applicable, the District shall apply the most stringent third-party label standard available for a product or service being acquired such as, ENERGY STAR, Forest Stewardship Council, Green Seal, UL EcoLogo, Cradle to Cradle, Safer Choice and the Electronic Products Environmental Assessment Tool (EPEAT). The District shall use independent, third-party social and/or environmental (eco) product or service label certifications when applicable when writing specifications or procuring materials, products, or services, whenever a responsible label standard is available. Qualifying labels shall be:

- Developed and awarded by an impartial third-party;
- Developed in a public, transparent, and broad stakeholder process; and
- Represent specific and meaningful leadership criteria for that product or service category.

In addition, whenever possible, label standards used in product or service specifications should represent standards that take into account multiple attributes and life-cycle considerations, with claims verified by an independent third party.



#### 4. District Code, District Policies and Federal and State Law and Regulations

It is the intent of this policy to complement current District Code and policy along with any applicable state and federal laws and regulations. When such code or law is updated to accommodate a more rigorous standard, or Board of Directors adopts or alters established policy, this administrative policy shall be considered to likewise require such additional provision.

#### 5. Responsibilities

The District will provide sufficient staffing, funding and material resources necessary to ensure that its Environmentally Preferable Procurement Program goals and priorities are met and results are reported.

### III. Procedures

#### 1. General

Every formal, informal and direct solicitation for service will contain an environmental commitment statement as follows:

##### Environmental Commitment

*The Costa Mesa Sanitary District recognizes its responsibility to minimize negative impacts on the community's health and the environment. The District further recognizes that the products and services the District buys have inherent environmental and economic impacts and that the District should make procurement decisions that embody, promote and encourage the District's commitment to the environment.*

*The District encourages potential vendors to bring forward emerging and progressive products and services that they offer which are most suited to the District's environmental principles.*

## 2. Preference

At the discretion of the District and where applicable, formal, informal and direct solicitations of non-public works projects may be given additional points for “Best Value” evaluation of proposals that present an environmentally preferable option, corporate practices, and/or other environmental solutions proposed by the potential vendor.

## 3. Environmental Alternatives

Potential Vendors will be encouraged to present alternative options in the bid or proposal that support the District’s commitment to the environment using appropriate forms as provided in the purchasing documents or solicitation that allow the District to reasonably evaluate presented options in a timely manner. Where applicable, potential vendors must provide recent examples of product testing and previous successful use for the District to properly evaluate the proposed product. Testing data from independent accredited organizations are strongly preferred.

## 4. Award

Award of all formal, informal and direct solicitations of non-public works projects will take into account the environmentally preferable options provided by potential Vendors and award will be made in accordance with the “Best Value” procedures described in the District’s Purchasing Policies and Procedures Manual Nothing in this document shall be construed to have a meaning other than that the Costa Mesa Sanitary District retains the exclusive right to make all evaluations in the manner in which it chooses. All decisions made by the District are considered to be final.

## IV. Definitions

1. **Best Value** – means the best value to the District based on all factors that may include, but not limited to the following:
  - A. Cost;
  - B. The ability, capacity and skill of a contractor to perform a contract or provide the supplies, services or equipment required;
  - C. The ability of a contractor to provide the supplies, services or equipment promptly or within the time specified without delay or interferences;
  - D. The character, integrity, reputation, judgment, experience and efficiency of a contractor;
  - E. The quality of a contractor's performance on previous purchases/services with the District; and
  - F. The ability of a contractor to provide future maintenance, repairs, parts and services for the use of the goods and services purchased.
  - G. Environmental preferable option that is most suited to the District’s environmental principles.

2. Biobased – means products that are composed in whole or in significant part, of biological products or renewable agricultural materials (including plant, animal and marine materials) or forestry materials.
3. Biodegradable – means the ability of a substance to decompose in the natural environments into harmless raw materials.
4. Bisphenols – means chemicals such as Bisphenol A (BPA), Bisphenol S (BPS), and Bisphenol F (BPF) are widely used in polycarbonate plastics, epoxy resins, food packaging, and thermal receipt paper. Exposure to BPA has been linked to asthma, neurodevelopmental problems, obesity, type 2 diabetes, heart disease, decreased fertility, and prostate cancer. Some manufacturers have substituted BPA with Bisphenol S (BPS) and Bisphenol F (BPF). These chemicals are less well studied but appear to have similar health effects such as hormone-disruption.
5. Chlorofluorocarbons (CFCs) – means any of a group of compounds that contain carbon, chlorine, fluorine, and sometimes hydrogen and have been used as refrigerants, cleaning solvents, aerosol propellants and in the manufacture of plastic foams.
6. Compostable – means a product that can be placed into a composition of decaying biodegradable materials and eventually turn into a nutrient-rich material. It is synonymous with "biodegradable", except it is limited to solid materials (liquid products are not considered compostable).
7. Contractor – means any person having a contract with the District.
8. Direct Solicitation – means quotes shall be obtained, if applicable for purchases more than five thousand dollars (\$5,000) and less than thirty thousand dollars (\$30,000) and a Pricing Quote Sheet completed. The general manager shall approve final selection.
9. Energy efficient product – means a product that is in the upper 25 percent of energy efficiency for all similar products, or that is at least 10 percent more efficient than the minimum level meeting US federal government standards
10. Environmentally Preferable Products – means goods and materials that have a less adverse impact on community health and the environment when compared with competing goods and materials. This comparison shall consider raw materials acquisition, production, manufacturing, packaging, distribution, re-use, operation, maintenance, and waste management of the good or material.
11. Environmentally Preferable Services – means services that have a more beneficial or less adverse impact on community health and the environment when compared with competing services.

12. Flame Retardants – means chemicals that are added to products to resist or inhibit the spread of fire. Flame retardant chemicals include, but are not limited to, halogenated, phosphorous-based, nitrogen-based, and nanoscale flame retardants.
13. Formal Solicitation – means purchases greater than \$125,000 and procedures that meet the requirements of state and local law, including Uniform Public Construction Cost Accounting Act, District Operations Code Chapter 4.04 and any policies and procedures approved by the general manager consistent with Chapter 4.04
14. Halogenated Flame Retardants – mean chemicals that contain chlorine or bromine bonded to carbon for that are added to products to resist or inhibit the spread of fire. Also known as organohalogen flame retardants. Many of these chemicals have persistent, bioaccumulative and toxic properties.
15. Indirect Solicitation – means at least three (3) bids shall be obtained from a predetermined vendor list for purchases of more than thirty thousand dollars (\$30,000) and less than one hundred twenty five thousand dollars (\$125,000) and the general manager shall approve final selection.
16. Life Cycle Cost (LCC) - the total cost of ownership over the lifespan of the asset. An analysis technique that takes into account operating, maintenance, the time value of money, disposal, and other associated costs of ownership as well as the residual value of the item.
17. Non-Public Works Project – means professional service or maintenance work such as studies, surveys, audits, routine, recurring and/or usual work to keep operate and/or maintain infrastructure.
18. Per or Poly Fluoroalkyl Substances – means chemicals sometimes referred to as PFCs or PFASs; including long- and short-chain per- and poly-fluorinated alkyl compounds and fluorinated polymers. These chemicals are commonly used in products for oil-, stain-, and water-repellent properties. They persist in the environment, have been found as ground and drinking water contaminants. Chemicals in this class have been linked to kidney and testicular cancer, elevated cholesterol, thyroid problems, and decreased fertility. They have been found in 98% of the U.S. Population.
19. Persistent, Bioaccumulative, Toxic compounds (PBT's) – means toxic chemicals that persist in the environment and increase in concentration through food chains as larger animals consume PBT-laden smaller animals. They transfer rather easily among air, water, and land, and span boundaries of programs, geography, and generations. As a result, PBTs pose risks to human health and ecosystems. They are associated with a range of adverse human health effects, including effects on the nervous system, reproductive and developmental problems, cancer, and genetic impact. They include heavy metals and chemicals such as mercury, dioxins, and PCB's (polychlorinated biphenyls), as well as certain brominated and chlorinated flame retardants.

20. Phthalates – means a class of chemicals that are added to some polyvinyl chloride (PVC) plastic products to make them more flexible. They are also added to some glues, caulks, paints, personal care products, and air fresheners. Phthalates are endocrine disruptors. Exposure to these chemicals has been linked to asthma, certain cancers, neurotoxicity, reduced fertility in men, and male reproductive birth defects.
21. Vendor - any person or entity who offers goods for purchase or services for hire.
22. Volatile Organic Compounds (VOCs) - chemicals that readily evaporate and contribute to the formation of air pollution when released into the atmosphere. May VOCs are classified as toxic and carcinogenic.
23. Water efficient - a product that is in the upper 25 percent of water efficiency for all similar products, or that is at least 10 percent more efficient than the minimum level meeting US federal government standards.



## Costa Mesa Sanitary District

Administrative Policy No. 40.60  
Approval Date: August 24, 2020

SUBJECT: COOPERATIVE PROCUREMENT STRATEGY

PURPOSE: To ensure the District's Cooperative Procurement Program is designed to provide value to the organization in areas such as reduced administrative costs, accelerated service delivery, lower pricing and/or opportunities for increased standardization

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### I. Purpose

To understand best practices and make informed decision about cooperative purchasing.

### II. Policy

It is the policy of the District to obtain quality goods and services to support effective and efficient operations by ensuring prudent use of public funds. Cooperative purchasing can save significant time and money in contract production as well as lower contract prices through the power of aggregation. To make informed decisions about cooperative purchasing the District will reference the criterion described in this policy to evaluate a cooperative program.

### III. Cooperative Procurement Models

**Joint Solicitation Model:** A procurement conducted by, or on behalf of, one or more public entities that have combined and standardized their requirements. The participating organizations make an advance commitment to use the resultant contract.

**“Piggyback” Model:** One or more public entities solicit their requirements and include an option for other organizations to access, or “piggyback,” the contract as awarded. This method may include a state or national cooperative affiliate. The use of this form of cooperative procurement is elective.

**Third Party Aggregator or Broker Model:** An external organization that establishes a cooperative program, working with one or more public entities to establish one or more contracts designed to appeal to a broad base of potential user agencies and provides the portal through which the contracts will be accessed. Aggregators facilitate identification of the competitor pool, consolidation of the buyer market and promotion of the contracts under their program auspices. The use of this form of cooperative procurement is elective.

### IV. Cooperative Procurement Strategy

The following questions will be used to evaluate the best choice for cooperative procurement.

## 1. Analysis and Evaluation of Cooperative Organization

- How long has this cooperative organization been operating?
- Does the District have to register as a member to use the contracts?
- Is there a fee to be a member?
- Does the cooperative conduct its own procurement process or use another agency as the lead?
- Was the solicitation advertised and documented? Where and when?
- What procurement laws does the cooperative follow in soliciting? Is it consistent with the District's Purchasing Chapter 4.04?
- How was the contract evaluated and awarded?
- Does their website contain accessible and thorough documentation?
- Is contact information provided to readily conduct more in-depth research?
- Is the cooperative a member of any national cooperative association that has high ethical values and standards for its members?

## 2. The Contract

- Does the awarded contract contain the specific solution the District is seeking?
- When was the contract awarded and when does it expire?
- What are the qualifications, capabilities and financial health of the awarded vendor and/or supplier?
- Do they have the capacity to fulfill the District's need?
- Are all applicable contract documents attainable?
- How is pricing addressed? Is it actual, percentage discount from list or ceiling based pricing?
- Can the terms and conditions of the contract be amended to meet the needs of the District?
- Does the cooperative have a process for vendor issues or disputes?



## Costa Mesa Sanitary District

Administrative Policy No. 50.00

Date Approved: May 12, 2005

**SUBJECT:** LIABILITY CLAIM PROCEDURES

**PURPOSE:** To provide District staff procedures to promptly process, evaluate, and resolve third party claims

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### **I. Purpose**

The District is a member of the Special District Risk Management Authority (SDRMA). This regulation establishes procedures to promptly process, evaluate and resolve claims in the most effective and efficient manner.

### **II. Conduct After an Accident**

Employees should not make statements about fault to parties involved in the accident but should only present identification and insurance information. Employees should also avoid making “gratuitous remarks” such as “we’ve been meaning to fix that pothole” or “this always happens.”

### **III. Loss Reporting**

Effective claims management relies on the prompt reporting and thorough investigation of losses to avoid needless litigation and unnecessary costs.

- a.** Incidents occurring on District property or involving District employees from which a claim could result, or in which the District could be held liable, must be reported promptly to the General Manager and labeled “CONFIDENTIAL for District’s claims adjuster/attorney” with a copy to the District Safety Officer (Administrative Services Manager, HR and Risk). All report fields should be completed, include the following:
  - A.** Name, address and phone number of reporting party;
  - B.** Date and time of the incident;
  - C.** Exact location of the incident;
  - D.** Name of person(s) sustaining injury;
  - E.** Description of the injuries and complaints;
  - F.** Description of property involved (if vehicle: make, model and year);
  - G.** Description of property damage;
  - H.** Description of how the incident occurred;
  - I.** Names, addresses and phone numbers of witnesses;

**J. Pictures of the accident.**

- b.** All reports shall be completed and submitted immediately for reporting to SDRMA. "Immediately" is defined as any time, day or night, within minutes of such accident, regardless of whether the incident occurs during or outside of standard working hours.
- c.** In all traffic collision incidents involving District vehicles, the official or employee shall immediately notify the Police Department and request the presence of an officer for the purpose of filing an Accident Report. A "District vehicle" is defined as any vehicle the District owns, leases or rents.
- d.** After the initial reporting, any documents, police reports, correspondence, telephone call, inquiries from interested parties or other information bearing upon the incident should be documented and reported to the Administrative Services Manager (HR & Risk Management) for reporting to SDRMA, noting sources, dates, times and other relevant information.
- e.** All forms are available from the Administrative Services Manager (HR & Risk Management) and as provided in the District SDRMA Property and Liability Coverage's notebook.

**IV. Claim Presentation**

A claimant, or their attorney, is required to file a claim with the Costa Mesa Sanitary District and SDRMA shall review the claim for appropriate action.

**V. Claim Investigation:**

- A.** The Administrative Services Manager will coordinate investigation requirements with SDRMA, providing all reported information and any additional information including but not limited to photographs, diagrams and other applicable reports on file.
- B.** Requests for information, District records, or the taking of statements from District employees from outside sources should be referred to SDRMA. District employees are instructed to give information concerning accidents or claims only to the Administrative Services Manager, General Manager, SDRMA, District Counsel, or their authorized representatives.

**V. Lawsuits**

Upon service of Summons and Complaint (by mail or personal service), the Administrative Services Manager and/or individual employee receiving it must immediately transmit these papers to the District Counsel and SDRMA with details as to date, time, place and how served.

**VI. Effective Date**

The effective date of this Administrative Policy shall be the date first written above.



## Costa Mesa Sanitary District

Administrative Policy No. 60.00

Date Approved: October 26, 2017

SUBJECT: CITIZENS ADVISORY COMMITTEE

PURPOSE: To provide citizen input into policy matters of the District

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### I. Purpose

The purpose of this policy is to establish procedures for creating a Citizens Advisory Committee (CAC) for the Costa Mesa Sanitary District (CMSD) Board of Directors, and to provide committee members with clear and concise operating guidelines to perform their duties.

### II. Background

CAC members provide citizen involvement and a channel of public communication to the Board. CAC members support the District Vision and help educate the public about the District's Strategic Plan Mission, goals, objectives, accomplishments, activities, programs and issues.

As directed by the Board and supported by Staff, the CAC will study relevant issues, advise on subjects and make recommendations and comments. Typical subjects may include, but are not limited to, strategic goals, public outreach programs, solid waste and wastewater operations, finance, solid waste diversion programs, operations code and policies, and wastewater capital projects.

### III. General Information and Procedures

Except as provided in this policy the committee shall be guided by the policies set forth in the Citizens Advisory Committee Handbook. In case of any inconsistencies between this policy and the Handbook, the provisions in this policy shall govern the committee.

### IV. Operating Guidelines

#### A. Composition and Appointments

1. The Citizens Advisory Committee shall consist of (11) eleven citizens residing within CMSD's service area, all of whom shall serve without

compensation. Appointed CAC members must live within CMSD service area.

2. Employees of CMSD are not eligible to serve on the CAC. Interested individuals will complete an application form to be considered for approval by the Board. The Board may interview CAC applicants prior to approving appointments.
3. Appointments will be announced publicly at a regular Board of Directors meeting where each Board member will recommend at least one applicant for appointment.
4. The term of appointment of each member of the CAC shall be for two years (staggered), such term to begin April 1. If an opening is filled during the term of an existing appointment, the appointment anniversary date shall be the previous April 1. Membership shall be limited to six years of continuous service. Individuals may be reappointed after two years off the CAC.

#### **B. Membership Removal**

1. Members of the CAC are subject to removal at any time by a majority vote of the Board of Directors, or as indicated below.
2. If a member does not attend two consecutive meetings, unless excused by the Chair, the Vice Chair shall contact that member by phone and inform the member of this section of the CAC Handbook. If the member does not attend the third consecutive meeting without being excused by the Chair, the member shall be removed through written notification from the Chair. If a member of the CAC does not attend 4 meetings in a calendar year, excused or not, the member may be removed through written notification from the Chair.
3. To vacate a position, the committee members shall file a written resignation letter to the Board of Directors.
4. The Board of Directors, at any time, may request the resignation of or terminate membership of any committee member.

#### **C. CAC Officers**

1. The CAC shall elect members to serve as Chair and Vice Chair, for a two-year term. Election of officers will take place on the CAC's first meeting of every other year. The General Manager shall appoint staff to support the CAC as Secretary to the CAC and as Staff to the CAC.
2. The President shall designate one member of the Board of Directors to serve one year as a non-voting liaison to the CAC.

**D. Meetings**

1. The CAC will meet as needed and will conduct their meetings consistent with Rosenberg's Rules of Order. Meetings will comply with the Ralph M. Brown Act and will be held at District headquarters, located at 290 Paularino Avenue.

**E. Goals, Objectives and Assignments**

1. Each year the CAC Chair will meet and consult with the Board President and General Manager to determine the District's goals and objectives for the following year and convey those needs to the CAC. The CAC will then develop the goals for the coming year and then forward their recommendations to the Board for final approval. The goals may be modified at any time by the Board.
2. The Board at any time may ask the CAC to undertake specific assignments, appoint Special Committees, or comment on particular issues. CAC recommendations may be referred directly to the Board of Directors.

**F. CAC Recommendations and Comments to The Board**

1. CAC recommendations will be submitted to the Board no later than 30 days after approval, except when the item under consideration is delayed due to unforeseen circumstances. The CAC Chair, or designee, will submit all recommendations to the Board, and will include the number of members present and the number of votes for and against a recommendation. A record of CAC meetings will be video recorded and made available for public viewing on District website. Minutes of the meeting will be scribed by Staff Secretary and made available for public viewing on District website.

**G. Actions**

1. Six CAC members constitute a quorum. Actions taken by the CAC shall require a simple majority of those present and voting for approval.

**H. Reports to The Board**

1. As needed, the CAC Chair, or designee, shall report information regarding the CAC and its activities to the Board. The Citizens Advisory Committee shall make an annual report of its activities to the Board of Directors.



## Costa Mesa Sanitary District

Administrative Policy No. 70.00  
Date Approved: August 24, 2020  
Date Updated: February 22, 2021

SUBJECT: NAMING OF DISTRICT FACILITIES

PURPOSE: To establish a set of standard procedures and guidelines for the naming and renaming of District facilities

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### I. Purpose

The purpose of this policy is to establish a set of standard procedures and guidelines for the naming and renaming of District facilities owned and operated by the Costa Mesa Sanitary District.

### II. Definition

1. Facility means buildings, wastewater lift stations, and meeting rooms.

### III. Objectives

1. Naming of District facilities enhances a sense of community within the District's service area.
2. Ensure that District facilities are easily identified and located.
3. Ensure that names given are consistent with the values and characteristics of the Costa Mesa Sanitary District.
4. Assure the quality of the title/name, so that it will serve the purpose of the District in a permanent manner.
5. Encourage public participation and input in order to fully represent the best interest of the area affected.

### IV. Qualifying Names and/or Criteria

1. Geographical location of the facility including descriptive names.
2. An outstanding feature of the area. (example: hill, river, vegetation)
3. Commonly recognized subjects of historical significance such as; event, person (nonliving), group, culture, or place.
4. A person (non-living) or group who significantly contributed to the acquisition or development of the facility.
5. An individual (non-living) who provided an exceptional service in the interest of the District as a whole or for the community as a whole.
6. A person (living) whose contribution or significant gift is of a most extraordinary nature.

**V. Exclusions:**

1. Religious organizations, political candidates or adjudicated felons are prohibited.

**VI. Renaming**

The intent of naming is for permanent recognition. The renaming of facilities is strongly discouraged. It is recommended that efforts to change a name be subject to the most crucial examination so as not to diminish the original justification for the name. Facilities named for subjects, other than individuals, may be changed in name only if the current name is ineffectual or inappropriate.

**VII. Procedure:**

1. Staff, District residents, community leaders and organizations interested in proposing a name for a facility must submit written recommendations for presentation to the District's Citizens Advisory Committee.
2. Recommendations need describe in detail why the candidate merits such recognition.
3. When naming after a person or persons, written documentation of approval by that individual or next of kin to be honored (if available/possible) is required as part of the proposal.
4. The Citizens Advisory Committee shall consider all requests and submit a formal recommendation for names deemed worthy of consideration to the Board of Directors
5. The Citizens Advisory Committee and Board of Directors will allow for public input and comment.
6. The Board of Directors will confirm facility names by resolution.
7. The Board of Directors has final approval and may reject any naming or renaming request and/or recommendation by the Citizens Advisory Committee.



## Costa Mesa Sanitary District

Administrative Policy No. 80.00

Date Approved: May 23, 2013

**SUBJECT:** PUBLIC RECORDS ACT REQUEST

**PURPOSE:** Establish procedures to facilitate accessibility of information to members of the public

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### **I. Purpose**

The purpose of this policy is to affirm the public's right to access District records and to set forth the procedures that will facilitate accessibility of information to members of the public.

### **II. Policy**

The public's right to access information concerning the conduct of the people's business is a fundamental and necessary right. A record shall not be withheld from disclosure unless it is exempt under applicable laws, or the public interest served by not making the record public clearly outweighs the public interest served by disclosure of the record. The California Public Records Act permits local agencies to adopt regulations stating the procedures to be followed when making their records available to the public. The Costa Mesa Sanitary District (CMSD) desires to establish a formal written policy affirming the public's right to access CMSD records and to set forth the procedures by which such records will be made available to the public. CMSD is mindful of the constitutional right of privacy afforded to individuals and it is the intent of CMSD to promulgate a policy that strikes an appropriate balance between the objectives of open government and the individual's right of privacy.

### **III. Procedures**

#### **A. Records Available for Inspection and Copying**

Records available for inspection and copying include any writing containing information relating to the conduct of the public's business that is prepared, owned, used, or retained by CMSD regardless of the physical form and characteristics. The records do not have to be written but may be in another format that contains information such as computer tape or disc or video or audio recording. "Writing" includes any handwriting, typewriting, printing, photostating, photographing, texting, and every other means of recording upon any form of communication or representation such as letters, words, pictures, sounds, or symbols, as well as all papers, maps, magnetic or paper tapes, photographic films and prints, electronic mail, and cellular telephone texting.

B. Locating and Identifying Records

Public records are open to inspection at all times during regular CMSD business hours. The District Clerk's Office maintains a centralized record keeping system. The District Clerk or his/her representative is responsible for responding to requests for records and coordinating the response, when appropriate. The District Clerk or his/her representative shall also, to the extent reasonably practicable, assist the public in making focused and effective requests for records and information. In order to accomplish this the District Clerk or his/her representative shall: (1) assist the member of the public with identification of records and information that are responsive to the request or the purpose of the request, if known; (2) describe the information technology and physical location in which the records exist; and (3) provide suggestions for overcoming any practical basis for denying the request.

C. Making a Request for Records

Requests should be made in writing and must contain a reasonable description of the desired records in order to expedite processing of the request. Request can be made using email, via CMSD's website at [www.cmsdca.gov](http://www.cmsdca.gov), or members of the public can download a Public Records Act Request form from CMSD's website and fax said form to (714) 650-2253.

D. Form of Records Provided

Records shall be made available in their original form or by a true and correct copy. Audio, photographic and computer data, or any other such records, shall be exact replicas unless the District Clerk or his/her representative determines it is impracticable to provide exact replicas. Any reasonably segregable portion of a record shall be provided to the public after deletion of portions that are deemed exempt from disclosure.

E. Time for Response

Upon receipt of a written or oral request for records, CMSD shall make the records promptly available to the requestor. In cases where the records are not readily identifiable or accessible, or additional time is needed to determine whether the request in whole or in part seeks copies of disclosable records, CMSD will have ten (10) calendar days to provide its determination. The ten (10) day time period shall be calculated from the date the request is received.

In unusual circumstances, CMSD may extend its time to respond by an additional fourteen (14) calendar days. Should this occur, CMSD will inform the requestor in writing of the extension within the initial ten (10) day period, setting forth the reasons for the extension, along with the estimated date of CMSD's further response. Unusual circumstances permitting the extension of time are limited to: (1) the need to search for and collect the requested records from facilities separate from the office processing the request; (2) the need to search for, collect, and appropriately examine a voluminous amount of separate and distinct records that have been asked for in a single request; (3) the need for consultation with another department or another agency that has a substantial interest in the response to the request; and/or (4) the need to compile data, to write programming language or a computer program, or to construct a computer report to extract data.

If a written request for information is denied in whole or in part, the denial shall be in writing and shall contain the explicit reasons for denial of access.

F. Fees and Charges

In most situations, CMSD will not charge any fees to cover the time and costs incurred in searching for, locating or collecting records. CMSD, however, may charge for the actual costs of duplicating paper copies of records and postage, consistent with the amounts set forth in the adoption of CMSD Resolution No. 2013-831. CMSD may also charge for duplication costs in another medium in accordance with the amounts set forth in the resolution (e.g. copying video or cassette tapes).

Requestors of electronic records shall pay for production costs, including the cost to construct the record and the cost of programming and computer services necessary to produce the copy if the request would require the production of a record that is otherwise only produced at regularly scheduled intervals, or the request would require data compilation, extraction, or programming to produce the record. However, CMSD will not charge for access to data that is readily accessible without significant cost to CMSD.

Attachment – Public Records Act Request Form



COSTA MESA SANITARY DISTRICT  
FAX (714) 540-1392

**PUBLIC RECORDS ACT REQUEST FORM**

DATE: \_\_\_\_\_

Requestor \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Telephone \_\_\_\_\_

Email \_\_\_\_\_

Please provide a written description of the records you are requesting below. The more specific you are, the easier it will be to determine if such records exist in District files. Use additional sheets if needed.

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## Costa Mesa Sanitary District

Administrative Policy No. 90.00  
Date Approved: August 24, 2020

**SUBJECT:** WEBSITE AND MOBILE APPLICATION PRIVACY POLICY

**PURPOSE:** To outline the privacy conditions for website and mobile application users.

### **I. Purpose**

The purpose of this policy is to summarize what personally identifiable information the District may collect, and how the District might use this information. This policy also describes other important topics relating to your privacy. The District reserves the right to modify this privacy policy at any time. The District will promptly reflect any such modifications on this web page.

### **II. Policy:**

#### **b. Information Collection:**

1. The District will only collect personally identifiable information (such as name, city, zip, email address, mailing address, school name, etc.) that you voluntarily provide through our website, mobile application, or e-mail correspondence. The District will collect general information, such as the type of browser you use, the files you request, and the application functions you use. This information that the District automatically collects is used to gather statistics and to improve the content of our web services and application by helping us understand how users are using the services. The District website logs do not identify a visitor by personal information and the District makes no attempt to link other websites with the individuals that browse the District website or use the mobile application.

The District does not sell any electronically collected personal information. Any distribution of electronically collected personal information will be solely for the purposes for which it was provided. It may be necessary, if required by law or if pertinent to judicial or governmental investigations, to release your personally identifiable information. If you have submitted personal information to the District electronically and would like it removed or modified, please contact us. The District will use reasonable efforts to comply with your request

**c. Security:**

The District has taken several steps to safeguard the integrity of its telecommunications and computing infrastructure. Security measures have been integrated into the design, implementation and operation of the District's website and mobile application as part of its continuing commitment to risk management. Nevertheless, the District does not guarantee the absolute security of information it maintains.

**d. Disclaimer:**

The District may post links to other websites. These may include links to websites operated by other government agencies, nonprofit organizations and private businesses. When you link to another site, you are no longer on the District Website and this Privacy Policy will not apply. When you link to another website, you are subject to the privacy policy of that new site.

**e. Limitation of Liability:**

1. The District attempts to maintain the highest accuracy of content on its website and mobile application. Any errors or omissions should be reported for investigation.
2. The District makes no claims, promises, or guarantees about the absolute accuracy, completeness, or adequacy of the contents of this website and expressly disclaims liability for errors and omissions in the contents of this website. No warranty of any kind, implied, expressed, or statutory, including but not limited to the warranties of non-infringement of third party rights, title, merchantability, fitness for a particular purpose, and freedom from computer virus, is given with respect to the contents of this website or its hyperlinks to other Internet resources.
3. References or links in this website to any specific commercial products, processes, or services, or the use of any trade, firm, or corporation name are for the information and convenience of the public, and do not constitute endorsement, recommendation, or favoring by the District, or its employees or agents.