



**CITY COUNCIL AGENDA
CITY COUNCIL REGULAR MEETING
CITY OF HALF MOON BAY**

TUESDAY, SEPTEMBER 16, 2025

**HYBRID MEETING (SEE NEXT PAGE)
ADCOCK COMMUNITY CENTER
535 KELLY AVENUE
HALF MOON BAY, CA 94019**

**Robert Brownstone, Mayor
Debbie Ruddock, Vice Mayor
Patric Jonsson, Councilmember
Paul Nagengast, Councilmember
Deborah Penrose, Councilmember**

7:00 PM

This agenda contains a brief description of each item to be considered. Those wishing to address the City Council on any matter not listed on the Agenda, but within the jurisdiction of the City Council to resolve, may come forward to the podium during the Public Forum portion of the Agenda and will have a maximum of three minutes to discuss their item. Those wishing to speak on a Public Hearing matter will be called forward at the appropriate time during the Public Hearing consideration.

Please Note: Anyone wishing to present materials to the City Council, please submit seven copies to the City Clerk.

Copies of written documentation relating to each item of business on the Agenda are on file in the Office of the City Clerk at City Hall and the Half Moon Bay Library where they are available for public inspection. If requested, the agenda shall be available in appropriate alternative formats to persons with a disability, as required by Section 202 of the Americans with Disabilities Act of 1990 (42 U.S.C. Sec. 12132.) Information may be obtained by calling 650-726-8271.

In compliance with the Americans with Disabilities Act, special assistance for participation in this meeting can be obtained by contacting the City Clerk's Office at 650-726-8271. A 48-hour notification will enable the City to make reasonable accommodations to ensure accessibility to this meeting (28 CFR 35.102-35.104 ADA Title II).

<https://www.halfmoonbay.gov/>

HYBRID MEETING PARTICIPATION PROTOCOLS

*This meeting will be held in-person and via Zoom for public participation. Remote participation is provided as a supplemental way to provide public comment, but this method does not always work. The public is encouraged to attend in person to ensure full participation. Public comments may be made in-person or remotely via Zoom, and interpretation will be available. All Councilmembers and staff will participate in person. During any public comment portions, attendees may use the “raise your hand” feature and will be called upon and unmuted when it is their turn to speak. The meeting will also be streamed on Channel 27, on pacificcoast.tv, and on the City website at <https://www.halfmoonbay.gov/315/City-Council-Agendas>. Please click to join the webinar: <https://us06web.zoom.us/j/87674804231> or join by phone at 669-900-9128, using Webinar ID 876-7480-4231. If joining by phone, use *9 to raise your hand, *6 to mute and unmute.*

1. ROLL CALL / PLEDGE OF ALLEGIANCE
2. APPROVAL OF AGENDA
3. PROCLAMATIONS AND PRESENTATIONS
 - 3A. MIDCOAST COMMUNITY COUNCIL UPDATE
 - 3B. HISPANIC HERITAGE PROCLAMATION
 - 3C. FARMWORKER HOUSING STUDY
4. MAYOR'S ANNOUNCEMENTS OF COMMUNITY ACTIVITIES AND COMMUNITY SERVICE
5. REPORT OUT FROM RECENT CLOSED SESSION MEETINGS
6. CITY MANAGER UPDATES TO COUNCIL
 - 6A. SENIOR COASTSIDERS VOLUNTEER OPPORTUNITIES
 - 6B. ABODE
7. PUBLIC FORUM
8. CONSENT CALENDAR
 - 8A. WAIVE READING OF RESOLUTIONS AND ORDINANCES
 - 8B. APPROVE THE MINUTES OF THE SEPTEMBER 2, 2025 SPECIAL MEETING

[ATTACHMENT](#)

8C. APPROVE THE MINUTES OF THE SEPTEMBER 2, 2025 REGULAR MEETING

[ATTACHMENT](#)

8D. UPDATED RECORDS RETENTION SCHEDULE

Staff Recommendation: Adopt a resolution adopting the updated Records Retention Schedule for the City of Half Moon Bay.

[STAFF REPORT](#)

[ATTACHMENT](#)

8E. RESOLUTION OF SUPPORT FOR GRANT APPLICATION TO THE SAN MATEO COUNTY TRANSPORTATION AUTHORITY FOR THE MEASURE A AND W 2025 HIGHWAY PROGRAM FOR THE HIGHWAY 1 MAIN STREET TO KEHOE AVENUE PROJECT

Staff Recommendation: Adopt a resolution 1) Directing staff to submit a grant application to the San Mateo County Transportation Authority (TA) for Measures A and W Highway Program funds for \$11,700,000 in grant funding from the TA with a \$1,300,000 local match for the Highway 1 Main Street to Kehoe Avenue Project; 2) Authorizing the City Manager, or their designee, to execute a funding agreement or memorandum of understanding and any amendments with the TA to encumber Measures A and W Highway Program funds should the applications be successful; 3) Committing to the completion of the Project, including the required local funding contribution of \$1,300,000, should the application be successful; 4) Certifying that any funds awarded by the TA will be used to supplement existing funds for program activities, and will not replace existing funds or resources; and 5) Authorizing the City Manager, or their designee, to take any other actions necessary to give effect to this resolution and execute applicable amendments.

[STAFF REPORT](#)

[ATTACHMENT](#)

8F. WARRANTS FOR THE MONTH OF AUGUST 2025

Staff Recommendation: Accept the warrants list for the month of August 2025.

[STAFF REPORT](#)

[ATTACHMENT](#)

9. ORDINANCES AND PUBLIC HEARINGS

None.

10. RESOLUTIONS AND STAFF REPORTS

10A. FINANCIAL REPORT FOR THE QUARTER ENDED ON JUNE 30, 2025

Staff Recommendation: Accept the Financial Report for the quarter ended on June 30, 2025.

[STAFF REPORT](#)

[ATTACHMENT](#)

10B. OPPORTUNITY CENTER OF THE COASTSIDE

Staff Recommendation: Adopt a resolution authorizing the City Manager to: 1) fund utilities and janitorial services at the Opportunity Center of the Coastsides through January 2026 in an amount not to exceed \$10,000, and 2) extend the professional service agreements with JobTrain, Renaissance Entrepreneurship Center, the Chamber of Commerce, and American Energy Society with a term ending January 15, 2026.

[STAFF REPORT](#)

[ATTACHMENT 1](#)

[ATTACHMENT 2](#)

10C. COMMUNITY MICROGRID DISCUSSION

Staff Recommendation: Receive a report on Community Microgrid Options and direct staff as appropriate.

[STAFF REPORT](#)

11. COMMISSION / COMMITTEE UPDATES

12. FOR FUTURE DISCUSSION / POSSIBLE AGENDA ITEMS

13. CITY COUNCIL REPORTS

14. ADJOURNMENT



**MINUTES
CITY OF HALF MOON BAY CITY COUNCIL
TUESDAY, SEPTEMBER 2, 2025
ADCOCK COMMUNITY/SENIOR CENTER, 535 KELLY AVENUE**

CONVENE SPECIAL MEETING

Mayor Brownstone called the special meeting to order at 7:00 p.m.

ROLL CALL

PRESENT: Councilmembers Jonsson and Nagengast, Vice Mayor Ruddock and Mayor Brownstone

Councilmember Penrose attended remotely under “just cause” provision of Brown Act, AB 2440

OPEN SESSION IDENTIFICATION OF CLOSED SESSION ITEMS

PUBLIC COMMENT ON CLOSED SESSION ITEMS

CLOSED SESSION

PUBLIC EMPLOYEE PERFORMANCE EVALUATION (Govt. Code section 54957)
Annual performance evaluation of City Manager Matthew Chidester

PUBLIC EMPLOYEE PERFORMANCE EVALUATION (Govt. Code section 54957)
Annual performance evaluation of City Attorney Catherine Engberg

ADJOURNMENT

Mayor Brownstone adjourned the meeting at 7:17 p.m.

Respectfully Submitted:

Approved:

Maggie Rodriguez, Assistant City Clerk

Robert Brownstone, Mayor

Approved by the City Council at the September 16, 2025 Regular Meeting.



MINUTES
CITY COUNCIL REGULAR MEETING
TUESDAY, SEPTEMBER 2, 2025
TED ADCOCK COMMUNITY CENTER, 535 KELLY AVENUE

1. ROLL CALL / PLEDGE OF ALLEGIANCE

Mayor Brownstone called the regular meeting to order at 7:22 p.m. and led the Pledge of Allegiance.

ROLL CALL

Assistant City Clerk Rodriguez announced that Councilmember Penrose would attend the meeting remotely under the “just cause” provisions of the Brown Act (AB 2449).

PRESENT: Councilmembers Jonsson, Nagengast, and Penrose (Remotely), Vice Mayor Ruddock and Mayor Brownstone

2. APPROVAL OF AGENDA

MOTION

Vice Mayor Ruddock moved and Mayor Brownstone seconded a motion to approve the Agenda. The question was called and the motion carried unanimously.

3. PROCLAMATIONS AND PRESENTATIONS

3.A HMB DOWNTOWN VITALITY COMMITTEE PRESENTATION

Krystlyn Geidt and Betsy Del Fierro from the HMB Downtown Vitality Committee Presented to the Council. The Council asked questions from the presenters and discussed the presentation.

4. MAYOR'S ANNOUNCEMENTS OF COMMUNITY ACTIVITIES AND COMMUNITY SERVICE

Mayor Brownstone announced Make It Main Street on September 5, 2025.

5. REPORT OUT FROM RECENT CLOSED SESSION MEETINGS

City Attorney Engberg reported that the Council met in Closed Session on September 2, 2-25 to discuss two personnel items; PUBLIC EMPLOYEE PERFORMANCE EVALUATION (Govt. Code section 54957) Annual performance evaluation of City Manager Matthew Chidester and

PUBLIC EMPLOYEE PERFORMANCE EVALUATION (Govt. Code section 54957) Annual performance evaluation of City Attorney Catherine Engberg. There was no reportable action taken.

6. CITY MANAGER UPDATES TO COUNCIL

City Manager Chidester welcomed Executive Assistant Huerta who thanked Intern Lara Keshav for her work over the summer in the City Managers Office.

City Engineer Bozorginia announced that CalTrans completed the staircase at Surfers Beach and access is restored.

7. PUBLIC FORUM

The following individuals addressed the Council:

- Deborah Penrose
- Cid Young
- Joanne Rokosky
- Alison H
- Tim Costello
- Jimmy Benjamin

Captain Cheechov addressed the public on the issue of fireworks on the Coastsides.

- Emily Boltz
- Krystlyn Geidt
- Harvey Rarback
- Joaquin Jimenez
- Anita Reese

8. CONSENT CALENDAR

The Consent Calendar consisted of the following items:

8.A WAIVE READING OF RESOLUTIONS AND ORDINANCES

8.B APPROVE MINUTES OF AUGUST 19, 2025 SPECIAL MEETING

8.C APPROVE MINUTES OF AUGUST 19, 2025 REGULAR MEETING

MOTION

Vice Mayor Ruddock moved and Councilmember Nagengast seconded a motion to approve the Consent Calendar. The question was called and the motion carried unanimously.

9. ORDINANCES AND PUBLIC HEARINGS

10. RESOLUTIONS AND STAFF REPORTS

10.A PLANNING COMMISSION APPOINTMENT

City Manager Chidester discussed the item with Council and the Public. Mayor Brownstone discussed the applicants with the Council. The Council discussed the applicants.

MOTION

Mayor Brownstone moved to appoint applicant Christopher DelNagro to the Planning Commission to fill one vacant seat term ending December 2026 and Vice Mayor Ruddock seconded the motion. The question was called and the motion carried unanimously.

10.B OPPORTUNITY CENTER OF THE COASTSIDE

Economic and Community Vitality Manager Decker presented her staff report to the Council with local business representatives Barrie R. Hathaway - JobTrain, Sharon Miller- Renaissance Entrepreneur Center, Eric Vettel - Coastside Venture Studio, and Krystlyn Geidt - Cham. The Council asked questions of staff and discussed the item.

The following individuals address the Council:

- Cid Young
- Maria Azevedo and Juan, Bay Area Orchid
- Carlos Alcantar Acosta, Foggy Clothing
- Joaquin Jimenez

RECESS

Mayor Brownstone called a recess at 9:39 p.m. and reconvened at 9:50 p.m.

10.C 2025 MEASURE D TRANSFERS

Community Development Director Lacko and Associate Planner Wilson presented their staff report to the Council.

The Council asked clarifying questions of staff and discussed the item.

The following individuals address the Council:

- Tim Pond
- Kevin Brennan

MOTION

Vice Mayor Ruddock moved and Councilmember Penrose seconded a motion to adopt Resolution 2025-61, approving a transfer of the 20 remaining Downtown base Measure D allocations, to be used for new dwelling units proposed outside of the Downtown area,

prioritized according to the scoring within the Measure D application checklist and as shown within Exhibit A to the Resolution (Attachment 1). The question was called and the motion carried unanimously.

10.D AMENDMENT TO THE TOLEMI CONTRACT FOR SOFTWARE TO SUPPORT THE RENTAL REGISTRATION AND RENT STABILIZATION PROGRAMS

Administrative Analyst Acosta presented a staff report to the Council.

The Council asked clarifying questions of staff and discussed the item.

The following individual addressed the Council:

- Cid Young

MOTION

Councilmember Penrose moved and Vice Mayor Ruddock seconded a motion to adopt Resolution 2025-62, authorizing the City Manager to approve an amendment to the Tolemi contract through February 2026 for \$16,666.67, with an option to extend through June 2026 for a total of \$25,000. The question was called and the motion carried unanimously.

10.E FISCAL YEAR 2025-26 PAVEMENT MAINTENANCE PROJECT

Associate Engineer Leda presented their staff report to the Council.

The Council asked clarifying questions of staff and discussed the item.

The following individuals addressed the Council:

- Cid Young

MOTION

Vice Mayor Ruddock moved and Mayor Brownstone seconded a motion to adopt Resolution 2025-63, authorizing the City Manager, or his designee, to advertise the Fiscal Year 2025-26 Pavement Maintenance Project for construction. The question was called and the motion carried unanimously.

10.F ASSET DISPOSITION POLICY

Senior Management Analyst Lopez presented their staff report to the Council.

The Council discussed the item and asked questions of staff.

MOTION

Vice Mayor Ruddock moved and Mayor Brownstone seconded a motion authorizing the adoption of a new Asset Disposition Policy. The question was called and the motion carried unanimously.

11. COMMISSION / COMMITTEE UPDATES

City Manager Chidester reported that the Parks and Recreation Commission met on August 27, 2025.

Public Works Director Bozorginia reported that BPAC will meet on Thursday September 4, 2025.

12. FOR FUTURE DISCUSSION / POSSIBLE AGENDA ITEMS

None.

13. CITY COUNCIL REPORTS

None.

14. ADJOURNMENT

Mayor Brownstone adjourned the meeting at 11:05 p.m.

Respectfully Submitted:

Approved:

Maggie Rodriguez, Assistant City Clerk

Robert Brownstone, Mayor

Approved by the City Council at the September 16, 2025 Regular Meeting.

BUSINESS OF THE COUNCIL OF THE CITY OF HALF MOON BAY

AGENDA REPORT

For meeting of: **September 16, 2025**

TO: Honorable Mayor and City Council

VIA: Matthew Chidester , City Manager

FROM: Maggie Rodriguez, Assistant City Clerk

TITLE: **ADOPTION OF UPDATED RECORDS RETENTION SCHEDULE**

RECOMMENDATION:

Adopt a resolution adopting the updated Records Retention Schedule for the City of Half Moon Bay.

FISCAL IMPACT:

There is no cost to the City associated with this action.

DISCUSSION:

Following adoption of the Records Retention Schedule in 2016, the City has followed a variety of legal updates to records retention laws in the state of California. Various updates will be necessary over time to ensure the City’s own policies are up to standard with the Government Code.

The proposed updated retention periods are in compliance with all laws and are standard business practice for California cities.

The retention schedules and incorporated updates provide clear, specific records descriptions and retention periods, and apply current law and technology to the management of Half Moon Bay’s records. By identifying which department is responsible for maintaining the original record, and by establishing clear retention periods for different categories of records, Half Moon Bay will realize significant savings in labor costs, storage costs, free filing cabinet and office space, and operational efficiencies.

It is standard business practice for California cities to authorize the routine destruction of records that have exceeded their adopted retention period, upon the request of the Department Head and with the consent in writing of the City Clerk and City Attorney, which is provided for in Section 2 of the proposed resolution.

It is also standard business practice for California cities to authorize updates to the schedule

without further action of the City Council; however, staff presented a more conservative approach when the original schedules were adopted: authorizing only minor updates. Section 3 allows for: “Minor updates including change in department or division names, improvements in descriptions, changes in comments, deleting records series that are no longer applicable, and / or what is scanned. Changes in the total retention and / or adding new records series must be presented to the City Council prior to taking effect.”

Below are some of the legal changes to the retention schedule:

City Clerk:

- CC-022: Deleted and split into 2 new items:

CC-022.1: Elections - Petitions (Initiative, Recall or Referendum) - IF INSUFFICIENT Retention: Final Examination + 1 year after petition examination

CC-022.2: Elections - Petitions (Initiative, Recall or Referendum) - IF SUFFICIENT Retention: Results + 8 months

Human Resources:

- HR-003.1 Deleted - COVID-19 Notifications to Employees (the State repealed this law)

New Items:

HR-015.5: Verifications of Employment, Child Support, etc. (From lenders or other outside companies)

Retention: When No Longer Required

Comments: Not an Agency record / Content does NOT relate in a substantive way to the conduct of the public's business; GC §34090 et seq

HR-018: Workplace Violence – Hazard identification, evaluation, correction, incident logs, investigations, etc.

Retention: 5 Years

The remainder of changes consist of clarifications based on current caselaw (e.g., *City of San Jose v. Superior Court*, 2 Cal.5th 608 (2017), regarding Councilmember text messages) and repeals or additions to legal citations that did not affect retention. Exhibit A details changes made in blue text, with strikethrough in red.

ATTACHMENT:

Resolution adopting the updated Records Retention Schedule (Exhibit A) for the City of Half Moon Bay

RESOLUTION NO. C-2025-64

**A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF HALF MOON BAY, CALIFORNIA,
ADOPTING A RECORDS RETENTION SCHEDULE, AUTHORIZING DESTRUCTION OF CERTAIN CITY
RECORDS, AND RESCINDING RESOLUTION NO. C-2022-84**

WHEREAS, the maintenance of numerous records is expensive, slows document retrieval, and is not necessary after a certain period for the effective and efficient operation of the government of the City of Half Moon Bay; and

WHEREAS, Section 34090 of the Government Code of the State of California provides a procedure whereby any City record which has served its purpose and is no longer required may be destroyed; and

WHEREAS, the State of California has adopted guidelines for retention periods for various government records; and

WHEREAS, the City Council of the City of Half Moon Bay adopted Resolution C-2016-51 adopting an updated records retention schedule on June 21, 2016; and

WHEREAS, the City Council of the City of Half Moon Bay adopted Resolution C-2022-84 adopting an updated records retention schedule on August 16, 2022.

**NOW, THEREFORE, THE CITY COUNCIL OF THE CITY OF HALF MOON BAY DOES HEREBY
RESOLVE AS FOLLOWS:**

Section 1. Resolution No. C-2022-84 is hereby rescinded.

Section 2. The records of the City of Half Moon Bay, as set forth in the Records Retention Schedule (Exhibit A), attached hereto and incorporated herein by this reference, are hereby authorized to be destroyed as provided by Section 34090 et seq. of the Government Code of the State of California and in accordance with the provision of said schedule upon the request of the Department Head and with the consent in writing of the City Clerk and City Attorney, without further action by the City Council of the City of Half Moon Bay.

Section 3. With the consent of the City Clerk, City Manager, and City Attorney, minor updates are hereby authorized to be made to the Records Retention Schedule without further action by the City Council. Minor updates include changes in Department or Division names, improvements in descriptions, changes in comments, deleting records series that are no longer applicable, and/or what is scanned. Changes in the Total Retention and/or adding new records series must be presented to the City Council of the City of Half Moon Bay prior to taking affect.

Section 4. The term “records” as used herein shall include documents, instructions, books, microforms, electronic files, magnetic tape, optical media, or papers as defined by the

California Public Records Act.

Section 5. The City Clerk shall certify the passage and adoption of this resolution and enter it into the book of original resolutions.

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

I, the undersigned, hereby certify that the forgoing Resolution was duly passed and adopted on the 16th day of September 2025, by the City Council of Half Moon Bay by the following vote:

AYES, Councilmembers:

NOES, Councilmembers:

ABSENT, Councilmembers:

ABSTAIN, Councilmembers:

ATTEST:

APPROVED:

Maggie Rodriguez, Assistant City Clerk

Robert Brownstone, Mayor

HOW TO USE RETENTION SCHEDULES

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

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

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

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

STRUCTURE: CITY-WIDE, DEPARTMENTS & DIVISIONS

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

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

BENEFITS

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

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

AUTHORIZATION TO DESTROY RECORDS (Paper or Electronic Records):

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

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

Copies, drafts, notes and non-records do NOT require authorization, and can be destroyed “When No Longer Required.”

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

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

RECORDS RETENTION SCHEDULE LEGEND

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

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

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

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

For file folders containing documents with different retention timeframes, use the document with the longest retention time.

P = Permanent

Indefinite = No fixed or specified retention period; used for databases, because the data fields are interrelated.

Vital? = Those records that are needed for basic operations in the event of a disaster.

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

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

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

Legend for legal citations (§: Section)
CC: Civil Code (CA)
CFC: California Fire Code
EVC: Evidence Code (CA)
FTB: Franchise Tax Board (CA)
HUD: Housing & Urban Develop. (US)
PC: Penal Code (CA)
UFC: Uniform Fire Code
W&I: Welfare & Institutions Code (CA)

B&P: Business & Professions Code (CA)
CCP: Code of Civil Procedure (CA)
CFR: Code of Federal Regulations (US)
FA: Food & Agriculture Code
GC: Government Code (CA)
LC: Labor Code (CA)
PRC: Public Resources Code
USC: United States Code (US)

CBC: California Building Code
CCR: California Code of Regulations (CA)
EC: Elections Code (CA)
FC: Family Code (CA)
H&S: Health & Safety Code (CA)
Ops. Cal. Atty. Gen.: Attorney General Opinions (CA)
R&T: Revenue & Taxation Code (CA)
VC: Vehicle Code (CA)

(Used by ALL Departments)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, claims, complaints, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
CITY-WIDE (Used by ALL Departments)								
Lead Dept.	CW-003	Affidavits of Publications / Public Hearing Notices / Legal Advertising / Affidavits of Posting	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Brown Act challenges must be filed within 30 or 90 days of action; Statute of Limitations on Municipal Government actions is 3 - 6 months; CCP §§337 et seq., 349.4 ; GC §§34090, 54960.1(c)(1)
Lead Dept. (Managing the Agreement / Contract)		Agreements / Contracts: ADMINISTRATIVE FILES (Correspondence, Project Administration, Project Schedules, Certified Payrolls, Insurance Certificates, Invoices, Logs, RFP, etc.)	Completion + 10 years	Yes: Before Completion	Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD Upon-Completion	Covers E&O Statute of Limitations (insurance certificates are filed with agreement); Published Audit Standards=4-7 years ; Statute of Limitations: Contracts & Spec's=4 years, Wrongful Death=comp. + 5 years, Developers=comp. + 10 years; Statewide guidelines propose termination + 5 years ; CCP §337 et. seq., GC §34090
Lead Dept. (Managing the Agreement / Contract)		Agreements / Contracts: ADMINISTRATIVE FILES (with Grant Funding) (Correspondence, Project Administration, Project Schedules, Certified Payrolls, Insurance Certificates, Invoices, Logs, RFP, etc.)	Completion + 10 years or After Funding Agency Audit, if required, whichever is longer	Yes: Before Completion	Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD Upon-Completion	Some Grant Funding Agencies require audits; Meets auditing standards; Grants covered by a Consolidated Action Plan are required for 5 years; Uniform Admin. Requirements for Grants to Local Governments is 3 years from expenditure report or final payment of grantee or subgrantee; statewide guidelines propose 4 years; 2 CFR 200.334; 7 CFR 3016.42; 21 CFR 1403.36 & 1403.42(b); 24 CFR 85.42, 91.105(h), 92.505, & 570.502(a), 28 CFR 66.42; 29 CFR 97.42; 40 CFR 31.42; 44 CFR 13.42; 45 CFR 92.42; OMB Circular A-133; GC §34090, GC §8546.7

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

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
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<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, claims, complaints, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Lead Dept. (Managing the Agreement / Contract)	CW-008	Agreements / Contracts: UNSUCCESSFUL BIDS, PROPOSALS or RESPONSES to RFPs (Request for Proposals) / RFQs (Request for Qualifications) that don't result in a contract	2 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	The RFP / RFQ and the successful proposal becomes part of the agreement or contract; GC §34090
Lead Dept.	CW-064	Assessment District Ballots, Protest Letters, and Envelopes - Prop. 218 proceedings	2 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	GC §53753(e)(2), 53755(d)
Staffing Dept.	CW-011	Boards and Committees: Recordings - AUDIO RECORDINGS of Meetings / Audio Tapes	2 years		Tape -(Mag)			City preference; State law only requires for 30 days; GC §54953.5(b)
Staffing Dept.	CW-012	Boards, Commissions, and Committees: City Council Subcommittees (Composed solely of less than a quorum of the City Council)	2 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	All recommendations are presented to the City Council; GC §34090 et seq.
	CW-013	Boards, Commissions, and Committees: External Organizations (e.g. County Board of Supervisors)	When No Longer Required		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Non-records
Staffing Dept.	CW-014	Boards, Commissions, and Committees: Residents Advisory Bodies Formed by CITY COUNCIL AGENDAS, AGENDA PACKETS.	Minimum 2 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Brown Act challenges must be filed within 30 or 90 days of action; GC §§34090, 54960.1(c)(1)
Lead Dept.	CW-051	City Attorney Opinions	Minimum 2 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	City preference; GC §34090

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

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, claims, complaints, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Lead Dept.	CW-021	Committees Internal - Attended by employees: All Records (e.g. Evaluation Committee, Records Management Committee, In-House Task Forces, etc.)	2 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	GC §34090
Lead (Responding) Dept.	CW-023	Complaints / Concerns from Citizens	Minimum 2 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	City preference; Statute of Limitations for personal property, fraud, etc. is 3 years; Claims must be filed in 6 months; CCP §§338 et seq., 340 et seq., 342 , GC §§945-6 , GC §34090
Lead Dept.	CW-025	Copies / duplicates of any record	Copies - When No Longer Required		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	GC §34090.7
Dept. that Authors Document or Receives the City's Original Document	CW-026	Correspondence - ROUTINE (IF CONTENT relates in a SUBSTANTIVE way to the conduct of the public's business) (e.g. Administrative Files , Chronological, e-mail, email with SUBSTANTIVE content General Files, Letters, Memorandums, Reading File, Working Files , etc.) SUBSTANTIVE synonyms: Significant, Meaningful, Considerable, Essential IF the Content relates in a substantive way to the conduct of the public's business	2 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	ONLY IF the Content relates in a substantive way to the conduct of the public's business; City of San Jose v. Superior Court (2017) 2 Cal.5th 608 ; GC §34090

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

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, claims, complaints, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Dept. that Authors Document or Receives the City's Original Document	CW-027	Correspondence - TRANSITORY / PRELIMINARY DRAFTS , Interagency and Intraagency Memoranda not retained in the ordinary course of business <u>Content NOT Substantive, or NOT made or retained for the purpose of preserving the informational content for future reference</u> (e.g. calendars, checklists, e-mail / <u>email</u> , flyers that does not have a material impact on the conduct of business, invitations, instant messaging, logs, mailing lists, meeting room registrations, <u>staff videoconference chats, notes and recordings</u> , supply inventories, <u>telephone messages, text messages</u> , transmittal letters, thank yous, requests from other cities, <u>social media</u> , undeliverable envelopes / <u>retuned mail</u> , visitors logs, voice mails, etc.)	When No Longer Required		Mag, Ppr			Refer to the City's Administrative Policies. <u>Electronic and paper records are categorized, filed and retained based upon the CONTENT of the record.</u> Records where either the <u>CONTENT relates in a SUBSTANTIVE way to the conduct of the public's business, or ARE made or retained for the purpose of preserving the informational content for future reference are SAVED by placing them in an electronic or paper (project) file folder and retained for the applicable retention period.</u> E-mails that have a material impact on business are saved outside the e-mail system by printing them out and placing them in a file folder, or saving them electronically; If not mentioned here, consult the City Attorney to determine if a record is considered transitory / preliminary drafts. GC §34090, GC §§ <u>7927.500, 7920-530 6252; 64 Ops. Cal. Atty. Gen. 317 (1981); City of San Jose v. Superior Court (2017) 2 Cal.5th 608</u>
Lead Dept.	CW-029	Drafts and Notes: Drafts that are revised (retain final version)	When No Longer Required		Mag, <u>Mfr. OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	As long as the drafts and notes are not retained in the "Regular Course of Business". Consult the City Attorney to determine if a record is considered a draft. GC §§34090, <u>7927.500, 7928.705, 7920.530 6252, 6254(a)</u>
Lead Dept.	CW-030	Facility Use Applications / Facility Use Permits	2 years		Mag, <u>Mfr. OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	GC §34090

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

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, claims, complaints, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Lead Dept.	CW-031	GIS Database / Data / Layers (both City-wide and Specialized)	When No Longer Required	Yes	Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	The Lead Department should print out historical documents (or save source data) prior to replacing the data, if they require the data or output for historical purposes; Department Preference (Preliminary documents); GC §34090 et seq.
Lead Dept. (Managing the Grant)	CW-032	Grants (UNSUCCESSFUL Applications, Correspondence)	2 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	GC §34090
Lead Dept. (Managing the Grant)	CW-033	Grants / CDBG / Reimbursable Claims / FEMA Claims / OES CLAIMS (SUCCESSFUL Reports, other records required to pass the funding agency's audit, if required) Applications (successful), grant agreement, program rules, regulations and procedures, reports to grant funding agencies, correspondence, audit records, completion records	After Funding Agency Audit, if required - Minimum 5 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Meets auditing standards; Grants covered by a Consolidated Action Plan are required for 5 years; Uniform Admin. Requirements for Grants to Local Governments is 3 years from expenditure report or final payment of grantee or subgrantee; statewide guidelines propose 4 years; 2 CFR 200.334; 7 CFR 3016.42; 21 CFR 1403.36 & 1403.42(b); 24 CFR 85.42, 91.105(h), 92.505, & 570.502(a), 28 CFR 66.42; 29 CFR 97.42; 40 CFR 31.42; 44 CFR 13.42; 45 CFR 92.42; OMB Circular A-133; GC §34090, GC §8546.7
Lead Dept.	CW-036	Material Safety Data Sheet (MSDS) / Safety Data Sheet (SDS) / Chemical Use Report Form (or records of the chemical / substance / agent, where and when it was used)	30 years		Mag, Mfr, OD, Ppr	S / I	Yes - After QC & OD	Previous MSDS may be obtained from a service; MSDS may be destroyed as long as a record of the chemical / substance / agent, where & when it was used is maintained for 30 years ; Applies to qualified employers; Claims can be made for 30 years for toxic substance exposures; 8 CCR 3204(d)(1)(B)(2 and 3), 29 CFR 1910.1020(d)(1)(i), GC §34090

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

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, claims, complaints, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Lead Dept.	CW-039	Newspaper Clippings	When No Longer Required		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Non-records - may be obtained from the newspaper company; GC §34090
Staffing Dept.	CW-040	Notices: Public Hearing Notices and Proofs of Publications	2 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Statute of Limitations on Municipal Government actions is 3 - 6 months; CCP§337 et seq; GC §34090
Human Resources	CW-043	Personnel Files (Department-level Files) Send all Originals to Human Resources	Send to Human Resources Upon Separation or Transfer	Before Separation	Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Ensure records kept in Department files comply with City policy (all originals are sent to Human Resources); GC §34090.7
Lead Dept.	CW-044	Personnel Files (Supervisor's Notes)	After Incorporation into Performance Evaluation or Documented Discipline	Before Annual Evaluation	Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Preliminary drafts: Notes maintained in a separate folder to be incorporated into performance evaluation, or to document progressive discipline; GC §34090 et seq.
Lead Dept.	CW-045	Photographs	When No Longer Required		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Preliminary Drafts; destroy unnecessary photographs. GC §§34090
City Clerk	CC-053	Public Records Requests / Request for Records / Subpoenas (Civil / Duces Tecum)	2 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	GC §34090
Lead Dept.	CW-046	Public Relations / Press Releases	2 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	GC §34090
Lead Dept. (Who Ordered the Appraisal)	CW-047	Real Estate Appraisal Reports: Property NOT purchased, Loans not funded, etc.	2 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Not accessible to the public; Statewide-Guidelines show 2 years; GC §§34090, 7928.705_6254(h)

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

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, claims, complaints, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Lead Dept. (Who Ordered the Appraisal)	CW-048	Real Estate Appraisal Reports: Purchased Property, Funded Loans	Minimum 5 years	Yes: Before Purchase	Mag, Mfr, OD, Ppr	S / I	Yes: After <u>QC & OD</u> <i>inactive</i>	Not accessible to the public until purchase has been completed; meets grant auditing requirements; 24 CFR 85.42 & 91.105(h), & 570.502(b); 29 CFR 97.42, GC §34090
	CW-050	Reference Materials: Policies, Procedures, Brochures, Flyers, <u>Handbooks</u> , Manuals, <u>Plans (if not provided in the schedule)</u> , <u>Standard Operating Procedures (SOPs)</u> , <u>Studies</u> , <u>Reports (if not provided in the schedule.)</u> Newsletters, etc.: Produced by OUTSIDE ORGANIZATIONS (League of California Cities, Chamber of Commerce, etc.)	When No Longer Required		Mag, <u>Mfr. OD</u> , Ppr	S / I	Yes: After <u>QC & OD</u>	Non-Records
Lead Dept.	CW-051	Reference Materials: Policies, Procedures, Brochures, Flyers, <u>Handbooks</u> , Manuals, <u>Plans (if not provided in the schedule)</u> , <u>Standard Operating Procedures (SOPs)</u> , <u>Studies</u> , <u>Reports (if not provided in the schedule.)</u> Newsletters, etc.: Produced by YOUR Department	Minimum 2 years		Mag, <u>Mfr. OD</u> , Ppr	S / I	Yes: After <u>QC & OD</u>	Statewide guidelines propose superseded + 2- or 5-years; Department preference; GC §34090
Lead Dept.	CW-052	Reference Materials: Policies, Procedures, Brochures, Flyers, <u>Handbooks</u> , Manuals, <u>Plans (if not provided in the schedule)</u> , <u>Standard Operating Procedures (SOPs)</u> , <u>Studies</u> , <u>Reports (if not provided in the schedule.)</u> Newsletters, etc.: Produced by OTHER Departments	When Superseded		Mag, <u>Mfr. OD</u> , Ppr	S / I	Yes: After <u>QC & OD</u>	Copies; GC §34090.7

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

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, claims, complaints, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Lead Dept.	CW-054	Reports, Studies (Historically significant - e.g., Zoning Studies)	P		Mag, Mfr, OD, Ppr	S/I	Yes: After <u>QC & OD</u> 10 years	Administratively and Historically significant, therefore retained permanently; GC §34090
Lead Dept.	CW-055	Reports, Studies (other than Historically significant reports - e.g. Annual Reports)	10 years		Mag, <u>Mfr. OD</u> , Ppr	<u>S / I</u>	Yes: After <u>QC & OD</u>	Information is outdated after 10 years; statewide guidelines propose 2 years ; If historically significant, retain permanently; GC §34090
Lead Dept.	CW-057	Special Projects / Subject Files / Issue Files	Minimum 2 years		Mag, <u>Mfr. OD</u> , Ppr	<u>S / I</u>	Yes: After <u>QC & OD</u>	Department Preference; GC §34090 et seq.
Lead Dept.	CW-058	Surveys / Questionnaires (that the City issues). If a summary of the data is compiled, the survey forms are considered a draft or transitory record, and can be destroyed as drafts (When No Longer Required)	2 years		Mag, <u>Mfr. OD</u> , Ppr	<u>S / I</u>	Yes: After <u>QC & OD</u>	GC §34090
Lead Dept.	CW-061	Training <u>Presented by City Staff</u> - ALL COURSE RECORDS (Attendance Rosters, <u>Sign-in Sheets</u> , Outlines and Materials; includes Ethics, <u>Harassment, Workplace Violence Prevention</u> , Safety Training, Tailgates)	5 years		Mag, Mfr, OD, Ppr	<u>S / I</u>	Yes: After <u>QC & OD</u> When Inactive	Department preference; Ethics, <u>Harassment & Workplace Violence</u> Training is 5 years; Statewide guidelines propose 7 years ; Calif. Labor Division is required to keep their OSHA records 7 years; EEOC/FLSA/ADEA (Age) requires 3 years for promotion, demotion, transfer, selection, or discharge; State Law requires 4-2-3 years for personnel actions; 8 CCR §3203 et seq., 29 CFR 1627.3(b)(4 ii), LC §6429(c); GC §§12946, <u>12960</u> , 34090, 53235.2(b); <u>53237.2(b)</u> ; LC §6401.9(f)

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

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, claims, complaints, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Lead Dept.	CW-062	Volunteer / Unpaid Intern Applications and Agreements - Successful	Inactive / Separation + 3 years		Mag. Mfr. OD, Ppr	S / I	Yes: After QC & OD	Department preference (Courts treat volunteers as employees); EEOC/FLSA/ADEA (Age) requires 3 years for promotion, demotion, transfer, selection, or discharge; 29 CFR 1602.31 & 1627.3(b)(1)(i)&(ii), GC §§ 12960, 34090
Lead Dept.	CW-063	Volunteer / Unpaid Intern Applications and Agreements - Unsuccessful or Pending Applicants	3 years		Mag. Mfr. OD, Ppr	S / I	Yes: After QC & OD	Department preference (Courts treat volunteers as employees); EEOC/FLSA/ADEA (Age) requires 3 years for promotion, demotion, transfer, selection, or discharge; 29 CFR 1602.31 & 1627.3(b)(1)(i)&(ii), GC §§ 12960, 34090

RECORDS RETENTION SCHEDULE: ADMINISTRATIVE SERVICES

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
ADMINISTRATIVE SERVICES								
Admin. Services	AS-001	Community Events / Leadership Events (National Night Out, Youth Summit, etc.)	Minimum 2 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
Admin. Services	AS-002	Disaster Preparedness Drill and Exercises	When No Longer Required		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Department Preference (preliminary drafts not retained in the ordinary course of business); GC §34090
Admin. Services	AS-003	Disaster Preparedness Plans / Emergency Response Plans	When Superseded, Minimum 2 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
Admin. Services	AS-004	EOC Activations (Real)	10 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090

RECORDS RETENTION SCHEDULE: BUILDING AND SAFETY

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
BUILDING AND SAFETY								
Building & Safety	BLDG-001	Address Assignments	P		Mag, Mfr, OD, Ppr	S//I	Yes: After QC & OD	Department preference; GC §34090
Building & Safety	BLDG-002	Address Files / Building Permits	P	Yes (all)	Mag, Mfr, OD, Ppr	S//I	Yes: After QC & OD	Statewide guidelines propose permanent; GC §34090, CBC §104.7 , H&S §19850
Building & Safety	BLDG-003	Building Permit Database	P	Yes (all)	Mag, <u>Mfr.</u> <u>OD, Ppr</u>	S//I	<u>Yes: After QC & OD</u>	Department Preference - (<u>required for Life of the Building</u>) - Data is interrelated; CBC §§ 1.8.4.3.1, 104.7, and 107.5 GC §34090, H&S §19850
Building & Safety	BLDG-004	Building Plans - Cancelled or Withdrawn	When No Longer Required		Mag, Mfr, OD, Ppr	S//I	Yes: After QC & OD	Department preference; Preliminary drafts not retained in the ordinary course of business; CBC §§ 1.8.4.3.1, 104.7 and 107.5 ; H&S§19850, GC §34090
Building & Safety	BLDG-005	Building Plans and Construction Documents - Finalled - SINGLE FAMILY RESIDENTIAL - SFR and APPURTENANCES - OTHER THAN SITE PLANS	180 days	Yes	Mag, Mfr, OD, Ppr	S//I	Yes: After QC & OD	Law does not require plans to be filed for dwellings less than 2 stories, garages & appurtenances, farms/ranches, 1-story with bearing walls less than 25'; CBC requires 180 days from completion date; CBC §§ 1.8.4.3.1, 104.7 & 107.5, H&S§19850, GC §34090
Building & Safety	BLDG-006	Building Plans and Construction Documents - Finalled - SINGLE FAMILY RESIDENTIAL - SFR and APPURTENANCES - SITE PLANS ONLY	P	Yes	Mag, Mfr, OD, Ppr	S//I	Yes: After QC & OD	Law does not require plans to be filed for dwellings less than 2 stories, garages & appurtenances, farms/ranches, 1-story with bearing walls less than 25'; CBC requires 180 days from completion date; CBC §§ 1.8.4.3.1, 104.7 & 107.5, H&S§19850, GC §34090

RECORDS RETENTION SCHEDULE: BUILDING AND SAFETY

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Building & Safety	BLDG-007	Building Plans and Construction Documents - Finalled - INDUSTRIAL, COMMERCIAL, MULTI-FAMILY DWELLINGS, PLACES OF PUBLIC ACCOMMODATION, TENANT IMPROVEMENTS (includes commercial structural plans, Hazardous Materials Questionnaire, etc.)	P	Yes (all)	Mag, Mfr, OD, Ppr	S // I	Yes: After QC & OD	Department Preference; Law requires for the life of the building for commercial and common interest dwellings only; Statewide guidelines propose 2 years for blueprints & specifications ; CBC §§ 1.8.4.3.1 , 104.7 & 107.5, H&S§19850, GC §34090
Building & Safety	BLDG-008	Certificates of Occupancy	P	Yes (all)	Mag, Mfr, OD, Ppr	S // I	Yes: After QC & OD	Department Preference; GC §34090
Building & Safety	BLDG-009	Construction Notices / Inspection Notices (correction notices, compliance orders, stop work notices, etc.)	<u>Until Cleared or Project Completion</u> When No-Longer-Required		Mag, <u>Mfr.</u> , <u>OD</u> , Ppr	S // I	<u>Yes: After QC & OD</u>	Preliminary Drafts; GC §34090
Building & Safety	BLDG-010	Reports: Building Activity	Minimum 5 years		Mag, <u>Mfr.</u> , <u>OD</u> , Ppr	S // I	<u>Yes: After QC & OD</u>	Department Preference; GC §34090
Building & Safety	BLDG-011	Requests and Permissions to Receive Copies of Plans (to and from Architects)	2 years		Mag, <u>Mfr.</u> , <u>OD</u> , Ppr	S // I	<u>Yes: After QC & OD</u>	GC §34090 et seq.
Building & Safety	BLDG-012	Uniform Building Codes / California Building Codes	When Superseded		Mag, <u>Mfr.</u> , <u>OD</u> , Ppr	S // I	<u>Yes: After QC & OD</u>	GC §50022.6

RECORDS RETENTION SCHEDULE: CITY CLERK

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
CITY CLERK								
Lead Dept.	CC-001	Affidavits of Publications / Affidavits of Posting Notices / Legal Advertising / Notices / Proofs of Publications / Public Hearing Notices	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Brown Act challenges must be filed within 30 or 90 days of action; Statute of Limitations on Municipal Government actions is 3 - 6 months; CCP §§337 et seq, 349.4 ; GC §§34090, 54960.1(c)(1)
City Clerk	CC-002	Agenda Packets: City Council	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD 2- years	Department preference; GC §34090
City Clerk	CC-003	<p>Agreements / Contracts - ALL (INFRASTRUCTURE, OR IF IMAGED, JPAs, MOUs)</p> <p><i>Agreement or Contract includes all contractual obligations (e.g. Specifications / Successful Proposal / Scope of Work)</i></p> <p>Examples of Infrastructure: Architects, Buildings, bridges, covenants, development, environmental, Joint Powers, MOUs, park improvements, property and property restrictions, redevelopment, reservoirs, sewers, sidewalks, street and alley improvements, settlement, subdivisions, utilities, water, etc.</p>	P	Yes: Before Completion	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD Upon-Completion	Department Preference; All infrastructure contracts should be permanent for emergency preparedness; Statute of Limitations is 4 years; 10 years for Errors & Omissions; land records are permanent by law; CCP §337 et. seq., GC §34090; Contractor has retention requirements in 48 CFR 4.703

RECORDS RETENTION SCHEDULE: CITY CLERK

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
City Clerk	CC-004	<p>Agreements / Contracts - ALL (NON-INFRASTRUCTURE, Professional Services Agreements - <u>NOT IMAGED</u>)</p> <p><i>Agreement or Contract includes all contractual obligations (e.g. Specifications / Successful Proposal / Scope of Work)</i></p> <p>Examples of Non-Infrastructure: Consultants, Franchises, Landscaping, Painting, Slurry Seals (Paving), Tree Trimming, Leases, Personnel, Professional Services, etc.</p>	Completion + 10 years	Yes: Before Completion	Mag, <u>Mfr.</u> , <u>OD</u> , Ppr	S / I	<u>Yes: After QC & OD</u>	Department Preference; Statute of Limitations is 4 years; 10 years for Errors & Omissions; land records are permanent by law; CCP §§337. 337.1(a), 337.15, 343; GC §34090, Contractor has retention requirements in 48 CFR 4.703(a)
City Clerk	CC-005	Annexations	P		Mag, Mfr, OD, Ppr	S / I	<u>Yes: After QC & OD</u> No	Department Preference; GC §34090
City Clerk	CC-006	Assessment District Formation	P		Mag, Mfr, OD, Ppr	S / I	<u>Yes: After QC & OD</u> No	Department Preference; GC §34090
City Clerk	CC-007	Board and Commission / Committee Rosters (Maddy Act)	2 years		<u>Mag.</u> , <u>Mfr.</u> , <u>OD</u> , Ppr	S / I	<u>Yes: After QC & OD</u>	GC §34090
City Clerk	CC-008	Board and Commission Recruitments: Applications, correspondence, notices, etc.	2 years		Mag, <u>Mfr.</u> , <u>OD</u> , Ppr	S / I	<u>Yes: After QC & OD</u>	GC §34090
City Clerk	CC-009	Deeds	P		Mag, Mfr, OD, Ppr	S / I	<u>Yes: After QC & OD</u> No	GC §34090
City Clerk	CC-010	Campaign Filings (FPPC 400 Series Forms and Form 501): SUCCESSFUL CANDIDATES (Elected Officials)	P		Mag, Mfr, OD, Ppr	S / I	Yes: After <u>QC -2 years</u>	Paper must be retained for at least 2 years; GC §81009(b) and (g)

RECORDS RETENTION SCHEDULE: CITY CLERK

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
City Clerk	CC-011	Campaign Filings (FPPC 400 Series Forms and Form 501): UNSUCCESSFUL CANDIDATES	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After <u>QC -2-years</u>	<u>Candidates without committees are not required to file their statements, reports or copies online or electronically</u> ; Paper must be retained for at least 2 years; GC §81009(b) and (g)
City Clerk	CC-012	Campaign Filings (FPPC 400 Series Forms): THOSE NOT REQUIRED TO FILE ORIGINAL WITH CITY CLERK (copies)	4 years		Mag, <u>Mfr, OD</u> , Ppr	S / I	<u>Yes: After QC</u>	Paper must be retained for at least 2 years; GC §81009(b) and (g)
City Clerk	CC-013	Campaign Filings (FPPC 400 Series Forms): OTHER COMMITTEES (PACS - not candidate-controlled)	7 years		Mag, <u>Mfr, OD</u> , Ppr	S / I	<u>Yes: After QC</u>	Paper must be retained for at least 2 years; GC §81009(c) and (g)
City Clerk	CC-014	Certificates of Election	P		Mag, Mfr, OD, Ppr	S / I	Yes: After <u>QC -2-years</u>	Department preference; GC §34090
City Clerk	CC-015	City Clerk's Filing System	Minimum 2 years		Mag, <u>Mfr, OD</u> , Ppr	S / I	<u>Yes: After QC & OD</u>	Department Preference; GC §34090
City Clerk & Public Works / Engineering	CC-016	Deeds, Easements, Liens, Rights of Way	P	Yes (all)	Mag, Mfr, OD, Ppr	S / I	<u>Yes: After QC & OD</u> No	Department preference, forms are maintained by City Clerk; Department file may include correspondence; GC §34090 et seq.
City Clerk	CC-017	Economic Interest Filings (FPPC 700 Series Forms - Statement of Economic Interests): ALL	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After <u>QC -2-years</u>	City maintains original statements; GC §81009(d)(e)(f)&(g)
City Clerk	CC-018	Elections - CANDIDATE FILE - SUCCESSFUL CANDIDATES (Nomination Papers, Candidate Statement, Form 700, etc.)	8 years		Mag, Mfr, OD, Ppr			Department Preference; Statewide guidelines proposes 4 years for successful candidates, 2-years for unsuccessful ; CA law states term of office and 4 years after the expiration of term and does not delineate between the two; EC §17100

RECORDS RETENTION SCHEDULE: CITY CLERK

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
City Clerk	CC-019	Elections - CANDIDATE FILE - UNSUCCESSFUL CANDIDATES (Nomination Papers, Candidate Statement, Form 700, etc.)	5 years		Mag, Mfr, OD, Ppr			Department Preference; Statewide guidelines proposes 4 years for successful candidates, 2 years for unsuccessful ; CA law states term of office and 4 years after the expiration of term and does not delineate between the two; EC §17100
City Clerk	CC-020	Elections - GENERAL, WORKING or ADMINISTRATION Files (Correspondence, Precinct Maps, County Election Services, Candidate Statements to be printed in the Sample Ballot, etc.)	2 years		Mag, Ppr			GC §34090
City Clerk	CC-021	Elections - HISTORY Files (Sample Ballot, Results)	P		Mag, Mfr, OD, Ppr	S / I	Yes: After 2 years	Department preference; GC §34090
City Clerk	CC-022.1	Elections - Petitions (Initiative, Recall / Referendum) - IF INSUFFICIENT	Final Examination + 1 year after petition examination		Ppr			Not accessible to the public; The 8 month retention applies after election results, or final examination if no election, unless there is a legal or FPPC proceeding. EC §§17200(b)(3), 17400
City Clerk	CC-022.2	Elections - Petitions (Initiative, Recall / Referendum) - IF SUFFICIENT	Results + 8 months		Ppr			Not accessible to the public; The 8 month retention applies after election results, or final examination if no election, unless there is a legal or FPPC proceeding. EC §§17200(b)(3), 17400

RECORDS RETENTION SCHEDULE: CITY CLERK

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
City Clerk	CC-022	Elections – Petitions (Initiative, Recall or Referendum)	Results + 8 months, or Final Examination if No Election + 1 year after petition examination if petition is insufficient 8 mo.		Ppr			Not accessible to the public; The 8 month retention applies after election results, or final examination if no election, unless there is a legal or FPPC proceeding. EC §§17200(b)(3), 17400
City Clerk	CC-023	Ethics Training Certificates / Sexual Harassment Prevention Training Certificates	5 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	GC §53235.2(b); GC §53237.2(b)
City Clerk	CC-024	FPPC Form 801 (Gift to Agency Report)	7 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC	Must post on website; FPPC Opinion; 2 CCR 18944(c)(3)(G)
City Manager	CC-025	FPPC Form 802 (Event Ticket / Pass Distributions Agency Report)	7 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC	Should post on website for 4 years; GC §81009(e)
City Clerk	CC-026	FPPC Form 803 (Behested Payment Report)	7 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC	GC §81009e
City Clerk	CC-027	FPPC Form 804 (Agency Report of New Positions)	P		Mag, Mfr. OD , Ppr	S / I	Yes: After QC	FPPC Regulation 18734(c); GC §81009e
City Clerk	CC-028	FPPC Form 805 (Agency Report of Consultants)	P		Mag, Mfr. OD , Ppr	S / I	Yes: After QC	FPPC Regulation 18734(c); GC §81009e
City Clerk	CC-029	FPPC Form 806 (Agency Report of Public Official Appointments)	7 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC	Must post on website; 2 CCR 18702.5(b)(3) ; 18705.5 ; GC §34090; GC §81009(e)
City Clerk	CC-043	Grand Jury Responses	5 years		Mag. Mfr. OD , Ppr	S / I	Yes: After QC & OD	Department preference; GC §34090

RECORDS RETENTION SCHEDULE: CITY CLERK

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
City Clerk	CC-030	Historical Records, Photographs, and Historical Projects (e.g. Incorporation, City Seal, Awards of significant historical interest, etc.)	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD No	City Clerk determines historical significance; records can address a variety of subjects and media. Some media (e.g. audio and video tape) may be limited because of the media's life expectancy; GC §34090
City Clerk	CC-031	Index to Records	Superseded		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD No	Department Preference; GC §34090
City Clerk	CC-032	COIs / Certificate of Insurance / Insurance Certificates - that can't be matched to an agreement or contract but vendor may be doing business with the City	11 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC'd & OD	Department Preference (most certificates are filed with the Agreement or Contract); GC §34090
City Clerk	CC-033	Minutes: City Council	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD No	Transfer minutes to Placer County Archives once they are 50 yrs old (for safe controlled environmental keeping); GC §34090
City Clerk	CC-034	Municipal Code Administration , Distribution, etc.	When No Longer Required		Mag, Mfr , OD, Ppr	S / I	Yes: After QC & OD	Preliminary drafts not retained in the ordinary course of business; GC §34090
City Clerk	CC-035	Oath of Office / City Council Responsible Practices Affirmation : City Council, Planning Commission, Employees	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC'd & OD	Department Preference; GC §34090
City Clerk	CC-036	Ordinances	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD No	GC §34090
City Clerk	CC-037	Public Records Requests / Request for Records / Subpoenas (Records / Duces Tecum)	2 years		Mag, Mfr , OD, Ppr	S / I	Yes: After QC & OD	GC §34090
City Clerk	CC-038	Recordings - AUDIO RECORDINGS of City Council Meetings / Audio Tapes	2 years		Mag, OD			Department Preference; State law only requires for 30 days; GC §54953.5(b)
City Clerk	CC-039	Recordings VIDEO RECORDINGS of City Council Meetings / Video Tapes	Minimum 10 years		Mag, OD			Department preference; Video recording of meetings are only required for 90 days; GC §§34090.7, 34090

RECORDS RETENTION SCHEDULE: CITY CLERK

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
City Clerk	CC-040	Records Destruction Authorization Forms	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC'd & OD	Department preference; GC §34090
City Clerk	CC-041	Records Retention Schedules / Amendments to Records Retention Schedules	P		Mag, Mfr, OD, Ppr	S / I	<u>Yes: After QC & OD</u> No	GC §34090 et. seq.
City Clerk	CC-044	Redistricting Web Page / District Boundary Web Page (Map, Redistricting Process, Agendas, Calendars, Notice, etc.)	10 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	EC §21160(i) GC §34090
City Clerk	CC-042	Resolutions: City Council	P		Mag, Mfr, OD, Ppr	S / I	<u>Yes: After QC & OD</u> No	GC §34090
City Clerk	CC-045	Secretary of State Statement of Facts / Registry of Public Agencies (Required of all Public Agencies whenever the Chair changes)	2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §34090

RECORDS RETENTION SCHEDULE: CITY MANAGER

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
CITY MANAGER								
City Manager	CM-001	City Council Correspondence	Minimum 2 years		Mag, Mfr. OD. Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
City Manager	CM-002	City Manager Correspondence (Interoffice, Citizens, Legislative Positions, Organizations, etc.)	Minimum 2 years		Mag, Mfr. OD. Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
City Manager	CM-003	Department Files	Minimum 2 years		Mag, Mfr. OD. Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
City Manager	CM-004	Lease Agreements: City-owned property leased to others	Completion + 5 years		Mag, Mfr. OD. Ppr	S / I	Yes: After QC & OD	Department Preference; (meets municipal government auditing standards & Statute of Limitations); GC §34090; CCP §337
City Manager	CM-005	Projects, Programs, Subject and Issues / Economic Development (Issues and/or projects will vary over time - e.g. Hotels, Cable TV, Developments, etc.)	Minimum 2 years	Yes: While Active Issues	Mag, Mfr. OD. Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
City Manager	CM-006	Speech Notes / PowerPoint Presentations	When No Longer Required		Mag, Mfr. OD. Ppr	S / I	Yes: After QC & OD	Notes, drafts, or preliminary documents; GC §34090 et seq.

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
CODE ENFORCEMENT								
Code Enforce.	CE-001	Code Enforcement / Abatement Case Files (Includes appeals and Code Enforcement Complaint Letters) Excludes Liens	Minimum 2 years	Yes: Until Resolution	Mag, Mfr. , OD , Ppr	S / I	Yes: After QC & OD	Department preference; Case is open until satisfactorily resolved (some cases are not resolved); CFC §104.3.4 , GC §34090
Code Enforce.	CE-002	Code Enforcement / Abatement Case Files (Includes appeals and Code Enforcement Complaint Letters) Liens, Release of Liens	P	Yes: Until Resolution	Mag, Mfr. , OD , Ppr	S / I	Yes: After QC & OD	GC §34090(a)

RECORDS RETENTION SCHEDULE: ENGINEERING (Recycling, Sewer Collections)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
ENGINEERING								
Engineering	ENG-001	Aerial Maps	P		Mag, Mfr, OD, Ppr	S / I	<u>Yes: After QC & OD</u> No	Department Preference; GC §34090
Engineering	ENG-002	Benchmarks	P		Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD	Department Preference; GC §34090
Engineering	ENG-003	Bonds: Labor and Materials, Performance Bonds	Release of Bond / Letter of Credit		Mag, <u>Mfr.</u> <u>OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	Securities (Performance Bonds, Letters of Credit, CD's, etc.) are released after the Notice of Completion is issued and replaced with the Warranty Bond, which is released 1 year after the Notice of Completion date. GC §34090
Engineering	ENG-004	Bonds: Subdivision Bonds, Letters of Credit	Release of Bond / Letter of Credit		Mag, <u>Mfr.</u> <u>OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	Securities (Performance Bonds, Letters of Credit, CD's, etc.) are released after the Notice of Completion is issued and replaced with the Warranty Bond, which is released 1 year after the Notice of Completion date. GC §34090
Engineering	ENG-005	Capital Improvement Projects (CIP): Administration File Project Administration, Certified Payrolls, Construction Manager's Logs, Daily Inspections, Daily Logs, Project Schedules, Progress meetings, Punch Lists, Real Estate Appraisals, RFIs and Responses, etc.	Completion + 10 years or After Funding Agency Audit, if required, whichever is longer	Yes: Until Completed	Mag, <u>Mfr.</u> <u>OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	Some grant funding agencies require audits; Statute of Limitations for Errors & Omissions is 10 years; Published Audit Standards=4-7 years; Statute of Limitations: Contracts & Spec's=4 years, Wrongful Death=comp. + 5 years, Developers=comp. + 10 years; Statewide guidelines propose termination + 5 years; CCP §337 et. seq., GC §34090

RECORDS RETENTION SCHEDULE: ENGINEERING (Recycling, Sewer Collections)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Engineering	ENG-006	Capital Improvement Projects (CIP): Permanent File Specifications and Addenda, Agreement / Contract, Successful Proposal, Change Orders, Geotechnical Studies and Reports, Operations and Maintenance Manuals (O and M Manuals,) Materials Testing Reports, Grading Permits, Hazardous Materials Plans, Notice of Completion, Photos, Soil Reports, Studies, Submittals, Surveys, etc.	P	Yes: Until Completed	Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD Complete + 10 years	Department preference; retained for disaster preparedness purposes; Statewide guidelines propose Permanent for Infrastructure plans ; GC §34090
Lead Dept.	ENG-007	Correspondence - Regulatory Agencies Not Related to a CIP (State and Federal Agencies - California Coastal Commission, EPA, Health Department, etc.)	Minimum 2 years	Yes: While Active Issues	Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD	Department preference; Some correspondence from Regulatory Agencies need to be retained for long periods of time; GC §34090
City Clerk	ENG-008	Deeds, Easements, Liens, Rights of Way Send all originals to the City Clerk	Copies - When No Longer Required	Yes (all)	Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD	Finals are maintained by City Clerk; Department file may include correspondence; GC §34090 et seq.
Engineering	ENG-009	Design and Construction Standards - Adopted by City / Authored by the City	P		Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD	Department Preference; GC §34090
Engineering	ENG-010	Drawings, Maps, Plans and Record Drawings, Large-Format Drawings, Survey Record Maps, Capital Improvement Project "As-Bid" and "As-Built"	P	Yes (all)	Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD No	Draws should be destroyed, some maps are also retained by Planning; Selected maps are retained in Public Works for administrative purposes; GC §34090, 34090.7
Land Develop.	ENG-011	Encroachment Permits: Temporary (Street Permits, Temporary Construction, Sidewalk Repairs, Traffic Control, Utility Cuts, Parking Permits , etc.)	Final / Completion + 2 years	Yes: Until Completion	Mag, Mfr, OD , Ppr	S/I	Yes: After QC & OD	GC § 34090
Engineering	ENG-012	Encroachments - Permanent (Permanent structures in the City's Right of Way)	P		Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD	Department Preference; GC §34090

RECORDS RETENTION SCHEDULE: ENGINEERING
(Recycling, Sewer Collections)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Engineering	ENG-013	Engineering Studies / Surveys - Preliminary Studies / Project Assessments (Not Acquired or Developed)	Minimum 10 years		Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD	Department Preference; GC §34090
Engineering	ENG-014	Engineering Studies / Surveys (City Built Projects in the Public Right of Way / on City owned Property)	P		Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD	Department Preference; GC §34090
Engineering	ENG-015	Geotechnical and Soil Reports; Hydrology Reports (Authored on behalf of the City)	P		Mag, Mfr, OD, Ppr	<u>S/I</u>	Yes: After QC & OD	Department Preference; GC §34090
Building	ENG-016	Plan Checks for Building Permits	When No Longer Required		Mag, <u>Mfr</u> , <u>OD</u> , Ppr	<u>S/I</u>	<u>Yes: After QC & OD</u>	Preliminary drafts; GC §34090 et seq.
Engineering	ENG-017	Private Land Development Projects / Job Files: Administration File Construction Inspections, Correspondence, Photos, etc. <i>Examples: CUPs, Lot Line Adjustments, Parcel Maps, Precise Alignment, Specific Plans, Split Lots, Subdivisions, Tracts,. TPMs, TSMs</i>	Completion + 10 years	Yes: Until Completed	Mag, <u>Mfr</u> , <u>OD</u> , Ppr	<u>S/I</u>	<u>Yes: After QC & OD</u>	Statute of Limitations for Errors & Omissions is 10 years; Statute of Limitations: Contracts & Spec's=4 years, Wrongful Death=comp. + 5 years, Developers=comp. + 10 years; CCP §337 et. seq., GC §34090

RECORDS RETENTION SCHEDULE: ENGINEERING
(Recycling, Sewer Collections)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
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HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Engineering	ENG-018	Private Land Development Projects / Job Files: Permanent Files Drainage, Driveway, Grading Plans, Rights of Way, Soil Reports, Stormwater, Private Lab Verifications, Testing Lab Final Reports, etc. Dedications, Easements, Abandonments (City Clerk is OFR) <i>Examples: CUPs, Lot Line Adjustments, Parcel Maps, Precise Alignment, Specific Plans, Split Lots, Subdivisions, Tracts, TPMs, TSMs</i>	P	Yes: Until Completed	Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD	Department preference; retained for disaster preparedness purposes; GC §34090
Engineering	ENG-019	Site Clearance / Soil Remediation / Mitigation	P	Yes: Before Completion	Mag, Mfr, OD, Ppr	S/I	Yes: After QC & OD	Department preference; GC §34090
Engineering	ENG-020	NPDES / Stormwater Monitoring and Inspection	3 years		Mag, <u>Mfr</u> , <u>OD</u> , Ppr	<u>S/I</u>	<u>Yes: After QC & OD</u>	Department Preference; Monitoring records required for 3 years; 40 CFR §§122.21, 122.41, 122.44; CCP §337 et seq.
Engineering	ENG-021	NPDES / Stormwater Permits	Superseded + 3 years		Mag, <u>Mfr</u> , <u>OD</u> , Ppr	<u>S/I</u>	<u>Yes: After QC & OD</u>	Department Preference; Monitoring records required for 3 years; 40 CFR §§122.21, 122.41, 122.44; CCP §337 et seq.
Engineering	ENG-022	Prop 218 Proceedings (fee increases): Proceedings, Protest Letters, etc.	2 years		Mag, <u>Mfr</u> , <u>OD</u> , Ppr	<u>S/I</u>	<u>Yes: After QC & OD</u>	GC §53753(e)(2); GC 53755(d)
State of California	ENG-023	SWTRS - Statewide Integrated Traffic Records System	When No Longer Required		Mag, <u>Mfr</u> , <u>OD</u> , Ppr	<u>S/I</u>	<u>Yes: After QC & OD</u>	Non-Records (Sheriff)
Engineering	ENG-024	Traffic Committee - ALL Records (Internal Employees)	2 years		Mag, <u>Mfr</u> , <u>OD</u> , Ppr	<u>S/I</u>	<u>Yes: After QC & OD</u>	GC §34090
Engineering	ENG-025	Traffic Counts	15 years		Mag, <u>Mfr</u> , <u>OD</u> , Ppr	<u>S/I</u>	<u>Yes: After QC & OD</u>	Department preference; GC §34090

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Engineering	ENG-026	Traffic Signal Locations	P	Yes	Mag, Mfr, OD, Ppr	S//I	Yes: After QC & OD	Department preference; Drafts should be destroyed; GC §34090
Engineering	ENG-027	Traffic Signal Timing	Replaced + 5 years		Mag, <u>Mfr.</u> <u>OD</u> , Ppr	S//I	<u>Yes: After QC & OD</u>	Department preference; Drafts should be destroyed; GC §34090
Engineering	ENG-028	Traffic Speed Surveys	15 years		Mag, <u>Mfr.</u> <u>OD</u> , Ppr	S//I	<u>Yes: After QC & OD</u>	Department preference (required every 5 years, but can be extended to 7 or 10 years); GC §34090
Engineering	ENG-029	Transportation Master Plans / Traffic Master Plans	P		Mag, Mfr, OD, Ppr	S//I	Yes: After QC & OD	Department preference; Drafts should be destroyed; GC §34090
Engineering	ENG-030	Underground Service Alerts (USA's) / Dig Alerts	3 years		Mag, <u>Mfr.</u> <u>OD</u> , Ppr	S//I	<u>Yes: After QC & OD</u>	Department Preference; entered into DigAlert Software the Excavator, Operator and the Regional Notification Center has the obligation to retain the notice for 3 years (required for 3 years) ; GC §§4216.2(f) & 4216.3(ed) ; 34090
Engineering	ENG-031	Underground Storage Tanks (City-owned) Location, Removal	P		Mag, <u>Mfr.</u> <u>OD</u> , Ppr	S//I	<u>Yes: After QC & OD</u>	Department Preference (required for the Life of the Tank); 23 CCR 2712(b); H&S §25284.24(l); GC §34090

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ENGINEERING / RECYCLING								
Engineering / Recycling	ENG-032	Recycling / Solid Waste Management: AB 939 Reports / SB 1383 Compliance (Organic Waste Collection and Recycling) , etc.	10 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Department preference; SB 1383 compliance is required for 5 years; 14 CCR § 18995.2 ; GC §34090
Engineering / Recycling	ENG-033	Tonnage Reports	10 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Department preference; GC §34090
ENGINEERING / SEWER COLLECTIONS								
Engineering / Sewer	ENG-034	CCTV Collection Line Inspection Tapes / Video Inspections / Video Tapes or Digital Recordings	5 years		Mag			Department Preference; GC §34090 et seq.
Engineering / Sewer	ENG-035	Complaints	2 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
Engineering / Sewer	ENG-036	Confined Space Entries	3 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Code of Federal Regulations requires 3 years; 40 CFR 122.41(j)(2)
Lead Dept.	ENG-037	Emergency Call Out Logs / Storm Call Out Logs /	5 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Department preference (used for FEMA / OES reimbursements); GC §34090
Engineering / Sewer	ENG-037.1	FOG (Fats, Oil and Grease) / Source Control / Pretreatment Annual / Semi-Annual Reports	3 years		Mag, Mfr. OD, Ppr	S / I	Yes: After QC & OD	Department Preference; NPDES Monitoring records required for 3 years; POTW reports are required for 3 years; 40 CFR 403.12; GC §34090
Engineering / Sewer	ENG-038	Lift Station - Inspections, Maintenance, Repairs, Service Requests, Alarm Recording, Logs, Charts, Flow Monitoring, Voltage Readings, Permits	Minimum 2 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Department Preference WC §13263.2(b) et seq.; 40 CFR 122.41(j)(2)GC §34090
Engineering / Sewer	ENG-039	Maintenance, Cleaning, Repairs, Stoppage Calls, Spills, Line Replacement	Minimum 3 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Department Policy; WC §13263.2(b) et seq.; 40 CFR 122.41(j)(2)GC §34090
Engineering / Sewer	ENG-040	Sanitary Spills and Overflows (SSOs)	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Required for a minimum of 5 years; SWRCB Order 2022-0103-DWQ; 2002-0103-DWQ & 2006-03 ; 40 CFR 122.41(j)(2); GC §34090

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Sewer & Water	ENG-041	SCADA Database / Historian	Indefinite - <u>Minimum 5 years</u>	Yes	Mag, <u>Mfr.</u> <u>OD, Ppr</u>	<u>S / I</u>	<u>Yes: After QC & OD</u>	Data Fields / Records are interrelated; <u>Databases where sewer records may be stored are required for 5 years; SWRCB Order 2022-0103-DWQ; GC §34090, 12168.7</u>
<u>Engineering</u> <u>/ Sewer</u>	ENG-042	Sewer System Management Plans (SSMP) and Audits, <u>Sanitary Sewer Overflows (SSOs) / Sanitary Spills Overflow Prevention Plan (SSOPP) and Sanitary Sewer Overflow Response Plan</u>	<u>Superseded + 6 years P</u>		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; <u>SSMPs are required to be retained 5 years and updated every 6 years</u> ; SSOs are required for a minimum of 5 years; 40 CFR 122.41(j)(2); <u>SWRCB General Order 2006-03; & 2022-0103-DWQ; GC §34090</u>
Lead Dept.	ENG-043	Underground Service Alerts (USA's) / <u>Dig Alerts</u>	3 years		Mag, <u>Mfr.</u> <u>OD, Ppr</u>	<u>S / I</u>	<u>Yes: After QC & OD</u>	Department Preference (required for 3 years); GC §§4216.2(f) & 4216.3(<u>ed</u>), 34090

RECORDS RETENTION SCHEDULE: FINANCE

(Admin. / Budget, Bus. License / Revenue, Acct., Payroll, Risk Management)

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FINANCE / ADMINISTRATION AND BUDGET								
Finance / Admin. & Budget	FN-001	Audit Reports / Annual Comprehensive Financial Report (ACFR) GAFR—Comprehensive Annual Financial Reports and related Audit Opinions	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD 90 days	Department Preference (copies); GC §34090.7
Finance / Admin. & Budget	FN-002	Audit Work Papers	5 years		Mag, Mfr, OD , Ppr	S / I	Yes: After QC & OD	Department Preference (meets municipal government auditing standards); Statewide guidelines propose audit + 4 years; Published articles show 3–7 years ; GC §34090
Finance / Admin. & Budget	FN-003	Budgets - Adjustments (Mid-Year)	5 years	Yes: Current Fiscal Year	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD 90 days	Department preference; GC §34090 et seq.
Finance / Admin. & Budget	FN-004	Budgets - Adopted / Final	P	Yes: Current Fiscal Year	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD 90 days	Department preference; GC §34090 et seq.
Finance / Admin. & Budget	FN-005	Budgets - Preliminary, Proposed, Backup Documents	When No Longer Required		Mag, Mfr, OD , Ppr	S / I	Yes: After QC & OD	Preliminary drafts; GC §34090
Finance / Admin. & Budget	FN-006	Letters of Credit	Upon Release		Mag, Mfr, OD , Ppr	S / I	Yes: After QC & OD	Securities (Performance Bonds, Letters of Credit, CD's, etc.) are released after the Notice of Completion is issued and replaced with the Warranty Bond, which is released 1 year after the Notice of Completion date. These are financial instruments, and therefore are exempt from the 2 year requirement for municipal records; GC §34090
Finance / Admin. & Budget	FN-007	Single Audits / Transportation Audits / PERS Audit, etc.	5 years		Mag, Mfr, OD , Ppr	S / I	Yes: After QC & OD	Department Preference (meets municipal government auditing standards); GC §34090
Finance / Admin. & Budget	FN-008	Vehicle Titles ("Pink Slips")	Sale or Disposal		Mag, Mfr, OD , Ppr	S / I		Department Preference; GC §34090

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FINANCE / BUSINESS LICENSE AND REVENUE								
Finance / Business Licenses & Revenue	FN-009	Accounts Receivable - Miscellaneous - Citations , Transient Occupancy Tax (TOT) Applications and Returns, Damage to Public Property, Invoices to Outside Entities, etc.	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After <u>QC & OD 90</u> days	Department preference; Meets auditing standards; GC §34090 et seq.
Finance / Business Licenses & Revenue	FN-010	Sewer Assessment Rolls (to Tax Assessor for Tax Rolls)	5 years		Mag, <u>Mfr, OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	Department preference; Meets auditing standards; GC §34090 et seq.
Finance / Business Licenses & Revenue	FN-011	Business License Applications and Renewals (Regulatory and Revenue Licenses) Includes Massage, Taxi and all other Business Licenses	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After <u>QC & OD 90</u> days	Department preference; Meets auditing standards; GC §34090 et seq.
Finance / Business Licenses & Revenue	FN-012	Cash Receipts / Daily Cash Summaries / Cashiers Reports / Cash Reports / Petty Cash	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After <u>QC & OD 90</u> days	Department preference; Meets auditing standards; GC §34090 et seq.

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FINANCE / GENERAL ACCOUNTING								
Finance / General Accounting	FN-013	1099's / 1096's / DE542 (California Report of Independent Contractors)	5 years		Mag, Mfr , OD , Ppr	S / I	Yes: After QC & OD	Department Preference; IRS: 4 years after tax is due or paid (longer for auditing & contractor delinquency); Ca. FTB: 3 years; IRS Reg §31.6001-1(e)(2), R&T §19530, GC §34090; 29 USC 436
Finance / General Accounting	FN-014	Accounts Payable / Invoices and Backup W-9s (Includes Invoices, Travel Expense Reimbursements, Warrant Request, etc.)	7 years	Yes: Until Paid	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD 90 days	Department Preference (meets municipal government auditing standards); Statewide guidelines propose audit + 4 years; Published articles show 3-7 years ; GC §34090
Finance / General Accounting	FN-015	Actuarial Valuation Reports	10 years		Mag, Mfr , OD , Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
Finance / General Accounting	FN-016	Bank Statements and Trustee Statements, Fiscal Agent Statements, Investment Account Statements, Bank Reconciliations, Bank Deposits, Bank Transmittal Advice	5 years		Mag, Mfr , OD , Ppr	S / I	Yes: After QC & OD	Department Preference; meets auditing standards; GC §34090, 26 CFR 31.6001-1
Finance / General Accounting	FN-017	Bond Official Statements / Transcripts / Certificates of Participations (COPs) - Includes Continuing Disclosure Reports See Bank Statements for statement retention.	Fully Defeased + 10 years	Yes: Until Maturity	Mag, Mfr , OD , Ppr	S / I	Yes: After QC & OD	Department Preference; Statute of Limitations for bonds, mortgages, trust deeds, notes or debentures is 6 years ; Bonds issued by local governments are 10 years; IRS bond auditing regulations state, "...material records should generally be kept for as long as the bonds are outstanding, plus 3 years after the final redemption date of the bonds ; There are specific requirements for disposal of unused bonds; CCP §§336 et seq. 337.5(a); 26 CFR 1.6001-1(e) ; 26 CFR § 1.148-5(d)(6)(iii)(E) ; GC §43900 et seq.

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Finance / General Accounting	FN-018	Checks / Warrants (Cashed)	7 years		Mag, Mfr, OD, Ppr	S / I	Yes: After <u>QC & OD</u> 90 days	Department Preference; meets municipal government auditing standards; GC §34090, CCP § 337
Finance / General Accounting	FN-019	Escheat (Unclaimed money / uncashed checks)	5 years		Mag, <u>Mfr, OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	Department preference; All tangible property held by government agencies escheats after 3 years; Statute of Limitations is 1 year for seized property; CCP §§340(d), <u>1355</u> . 1519; GC §34090
Finance / General Accounting	FN-020	Financial Services Database	Indefinite - <u>Minimum 5 years</u>	Yes	Mag, <u>Mfr, OD, Ppr</u>	<u>S / I</u>	<u>Yes: After QC & OD</u>	Data Fields / Records are interrelated; GC §34090
Finance / General Accounting	FN-021	Investment Reports / Treasurer's Reports	5 years	Yes: Until Paid	Mag, <u>Mfr, OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	Department Preference; Meets auditing standards; GC§ 34090
Finance / General Accounting	FN-022	Investments / Arbitrage / Certificate of Deposit / Investment Bonds (Receipts / Advisor Reports / Trade Tickets / LAIF (Local Agency Investment Fund))	5 years	Yes: Until Paid	Mag, <u>Mfr, OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	Department Preference; Meets auditing standards; Published articles show disposal + 7 years for security brokerage slips; statewide guidelines propose permanent ; FTC Reg's rely on "self-enforcement"; GC§§ 34090, 43900
Finance / General Accounting	FN-023	Journal Entries / Journal Vouchers	5 years		Mag, Mfr, OD, Ppr	S / I	<u>Yes: After QC & OD</u> No	Department Preference; meets municipal government auditing standards; Statute of Limitations is 4 years; statewide guidelines propose Audit + 5 years ; GC §34090, CCP § 337
Finance / General Accounting	FN-024	Private Land Developer Trust Accounts / Deposit Balances	Close + 5 years		Mag, <u>Mfr, OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	Department Preference; (meets municipal government auditing standards); GC §34090
Finance / General Accounting	FN-025	Purchase Orders and Attachments /W-9s	5 years		Mag, <u>Mfr, OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	Department Preference; Meets auditing standards; GC §34090

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Finance / General Accounting	FN-026	Reports - Finance Reports created from Database : Subsidiary Ledgers, Reconciliations, Registers, Transaction Histories, Balance Sheets, Revenue and Expenditure Reports, etc. (MONTHLY OR PERIODIC)	When No Longer Required		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Department preference (The Financial System Database is the original; reports are considered drafts or copies); GC §34090
Finance / General Accounting	FN-027	Reports: Annual State or Federal: State Controller's Report, Local Government Compensation Report, Gas Tax, MOE (Maintenance of Effort) Report, Fixed Charge Special Assessment Report, Public Self Insurer Report (SIP Report), Street Report, etc.	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD 90 days	Department Preference; Meets auditing standards; GC §34090
Finance / General Accounting	FN-027.1	W-9s	Vendor Inactive + 3 years		Mag, Mfr. OD, Ppr	S / I	Yes: After 90 days	Meets IRS auditing standards; GC §34090
FINANCE / PAYROLL								
Finance / Payroll	FN-028	CalPERS Reports - Annual Valuation Reports, Actuarial Valuation Reports, Annual Employer Statements	5 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Department Preference; Retained to match other auditing periods; GC §34090
Finance / Payroll	FN-029	DE-6, DE-7, DE-9, DE-43, W-3, and DE-166, 941 Forms, IRS 5500 Forms (Employee Benefit Plans), PERS / FICA and Medicare Adjustments - Quarterly Payroll Tax Returns / OASDI, Federal Tax Deposits, Adjustments, etc.	5 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Department Preference; IRS: 4 yrs after tax is due or paid; Ca. FTB: 3 years; Articles show 7 years; 26 CFR §31.6001-1(e)(2), R&T §19530; 29 CFR 516.5 - 516.6, 29 USC 436, GC §34090
Finance / Payroll	FN-030	Deferred Compensation (457, 401A) Reports, Registers	5 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Department preference; GC §34090
Finance / Payroll	FN-031	Payroll Benefit Files / Administration Forms (Changes, Personnel Action Form copies, Vacation pay-off requests, etc.)	Separation + 5 years		Mag, Mfr. OD , Ppr	S / I	Yes: After QC & OD	Department preference; GC §34090
Finance / Payroll	FN-031.1	Payroll Direct Deposit Authorizations	5 years		Mag, Ppr	S / I	Yes: After QC & OD	Department preference; GC §34090

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Finance / Payroll	FN-032	Payroll Journals	5 years		Mag, Mfr. , OD , Ppr	S / I	Yes: After QC & OD	Department preference; GC §34090
Finance / Payroll	FN-033	Payroll Reports (includes Deduction Registers, Leave Registers, Time Transaction Reports, etc.)	5 years		Mag, Mfr. , OD , Ppr	S / I	Yes: After QC & OD	Department preference; GC §34090
Finance / Payroll	FN-034	Time Sheets / Time Cards / Overtime Sheets / Overtime Cards	5 years		Mag, Mfr. , OD , Ppr	S / I	Yes: After QC & OD	Department preference; Meets auditing standards (audit + 4 years); IRS requires 4 years; Ca. requires 2 yr min.; FTB keeps 3 years; Most Employees provide digital signatures when they submit their timecards, but some in Public Works and Community Services do not (another employee enters their time); IRS Reg §31.6001-1(e)(2), R&T §19530; LC § 1174(d); 29 CFR 516.5; GC §34090
Finance / Payroll	FN-035	W-2's	5 years ^P		Mag, Mfr. , OD , Ppr	S / I	Yes: After QC & OD	Department Preference for PERs Buy-back purposes ; IRS: 4 yrs after tax is due or paid; Ca. FTB: 3 years; Articles show 7 years; IRS Reg §31.6001-1(e)(2), R&T §19530; 29CFR 516.5 - 516.6, 29USC 436, GC §34090
Finance / Payroll	FN-036	W-4's	No Longer in Effect + 4 years		Mag, Mfr. , OD , Ppr	S / I	Yes: After QC & OD	IRS Regulation 31-6001-1 four years after the due date of such tax for the return period to which the records relate, or the date such tax is paid, whichever is the later. GC §34090; 26 CFR 31.6001-1
FINANCE / RISK MANAGEMENT								
Finance / Risk Manage.	FN-037	Lawsuits / Litigation	Resolution + 5 years	Yes: Until Settlement	Mag, Mfr. , OD , Ppr	S / I	Yes: After QC & OD	Department preference; CCP §§ 337 et seq.; GC §§ 911.2, 945.6 , 34090, 34090.6; PC §832.5(b)
Finance / Risk Manage.	FN-038	Claims	Resolution + 5 years	Yes: Until Settlement	Mag, Mfr. , OD , Ppr	S / I	Yes: After QC & OD	Department preference; CCP §§ 337 et seq.; GC §§ 911.2, 945.6 , 34090, 34090.6; PC §832.5(b)

RECORDS RETENTION SCHEDULE: FINANCE

(Admin. / Budget, Bus. License / Revenue, Acct., Payroll, Risk Management)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Finance / Risk Manage.	FN-039	Insurance Policies (City-owned policies)	P		Mag, Mfr, OD, Ppr	S / I	Yes: After <u>QC & OD</u> 90 days	Department Preference; GC §34090

RECORDS RETENTION SCHEDULE: HUMAN RESOURCES

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
HUMAN RESOURCES								
Human Resources	HR-001	Benefit Plan Documents (CalPERS, Optical, Dental, etc.)	Duration of the Contract + <u>26</u> years	Yes: For Duration of Contract	Mag, <u>Mfr.</u> <u>OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	EEOC / ADEA (Age) requires 1 year after benefit plan termination; Federal law requires 6-years after filing date for retirement ; State Law requires 2 years after action; 29 CFR 1627.3(b)(2); 29 USC 1027; GC §§12946, <u>12960</u> , 34090
Human Resources	HR-002	Classification / Reorganization Studies (for employee classifications and department structures)	Minimum 3 years		Mag, <u>Mfr.</u> <u>OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	Bureau of National Affairs recommends 2 years for all supplementary Personnel records; Wage rate tables are 1 or 2 years; State requires 2 years; 29 CFR 516.6, 29 CFR 1602.14, GC §§12946, <u>12960</u> , 34090
Human Resources	HR-003	Compensation Surveys and Studies	Minimum 3 years		Mag, <u>Mfr.</u> <u>OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	Bureau of National Affairs recommends 2 years for all supplementary Personnel records; Wage rate tables are 1 or 2 years; State requires 2 years; 29 CFR 516.6(2), 29 CFR 1602.14, GC §§12946, <u>12960</u> , 34090
Human Resources	HR-003.1	COVID-19 Notifications to Employees	3 years		Mag, Mfr. OD, Ppr	S / I	Yes: After QC & OD	LC §6409.6(k), GC §34090
Human Resources	HR-004	<u>California Civil Rights Department (CRD) / Department of Fair Employment and Housing (DFEH or EEOC) Claims / Harassment Claims</u>	Final Disposition + <u>43</u> years		Mag, <u>Mfr.</u> <u>OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	All State and Federal laws require retention until final disposition of formal complaint; State requires <u>4-2</u> years after "fully and finally disposed"; 2 CCR <u>11013 7287-0</u> ; GC §§12946, <u>12960</u> , 34090
Human Resources	HR-005	DMV Pull Notices	When Superseded or Separated		Mag, <u>Mfr.</u> <u>OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	Transitory or source records not retained in the ordinary course of business; CHP audits every 2 years; Bureau of National Affairs recommends 2 years for all supplementary Personnel records; GC §34090

RECORDS RETENTION SCHEDULE: HUMAN RESOURCES

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Human Resources	HR-006	Drug and Alcohol Test Results (All - Positives and Negatives)	5 years		Mag, <u>Mfr.</u> <u>OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	Department preference; D.O.T. Requires 5 years for positive tests, 1 year for negative tests; EEOC/FLSA/ADEA (Age) requires 3 years physical examinations; State Law requires 2 years; 29 CFR 1627.3(b)(1)(v), GC §§12946, <u>12960</u> , 34090; 49 CFR 655.71 et seq.; 49 CFR 382.401 et seq. 49 CFR 653.71
Human Resources	HR-007	Employment Verifications	When No Longer Required		Mag, <u>Mfr.</u> <u>OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	Preliminary drafts not retained in the "Regular Course of Business" GC §§34090
Human Resources	HR-008	I-9s	Separation + 3 years		Mag, Mfr, OD, Ppr	<u>S / I</u>	Yes: After QC & OD	Non-citizens must re-certify periodically; RICA recommends Required for 1 year from termination or 3 years from hiring, whichever is later; EEOC / FLSA / ADEA (Age) requires 3 years for "any other forms of employment inquiry"; State Law requires 2 -3 years; <u>INA 274A(b)(3); INS Rule 274a.1(b)(2);</u> 8 CFR 274a.2; 29 CFR 1627.3(b)(1); GC §§12946, <u>12960</u> , 34090
Human Resources	HR-009	Job Descriptions / Classification Specifications	Minimum <u>4</u> <u>3</u> years		Mag, Mfr, OD, Ppr	<u>S / I</u>	Yes: After <u>QC & OD</u> <u>4</u> <u>year</u>	Department preference; EEOC/FLSA/ADEA (Age) requires 3 years for promotion, demotion, transfer, selection, or discharge; State Law requires <u>4 2-3</u> -years; retirement benefits is 6 years from last action; 29 CFR 1602.31 & 1627.3(b)(1), <u>8-CCR §3204(d)(1) et seq.</u> ; GC §§12946, <u>12960</u> , 34090
Human Resources	HR-010	Labor Relations Files (Negotiation Notes, Correspondence, Interpretation of MOU Provisions, Documentation, etc.)	10 years		Mag, <u>Mfr.</u> <u>OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	Department Preference; GC §34090

RECORDS RETENTION SCHEDULE: HUMAN RESOURCES

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards.</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Human Resources	HR-011	OSHA Inspections and Citations, Log 200 and Log 300, 301, 301A	5 years		Mag, <u>Mfr</u> , <u>OD</u> , Ppr	S / I	Yes: After <u>QC & OD</u>	Calif. Labor Division is required to keep their records 7 years; OSHA requires 5 years; State law requires 2 years; 8 CCR 14300.33 , 8 CCR §3203(b)(1), GC §34090; LC §6429c
Human Resources	HR-012	Personnel Files - Employee File Includes Application, Disciplinary Actions, Evaluations, Formal Complaints, Grievances / Appeals, Policies, Oath of Disaster Workers / Oaths of Office, PAFs, 1095-C , 1094-C , etc.	Separation + 30 years, or Termination of Benefits + <u>5 years</u> , whichever is longer		Mag, Mfr, OD, Ppr	S / I	Yes: After <u>QC & OD</u> Separation + 1-year	Department Preference; statute of limitations for retirement benefits is 6 years from last action; EEOC/FLSA/ADEA (Age) requires 3 years for promotion, demotion, transfer, selection, or discharge; State Law requires 2 -3 years; 29 CFR 1602.31 & 1627.3(b)(1), GC §§ 3105, 12946, 12960 , 34090; 29 USC 1113, LC §1198.5 ;
Human Resources	HR-013	Personnel Files - Medical / Background File (all employees) Pre-employment Medical Clearances, ADA Accommodations, etc.	Separation + 30 years, or Termination of Benefits + <u>5 years</u> , whichever is longer	Yes: Until Separation	Mag, Mfr, OD, Ppr	S / I	Yes: After <u>QC & OD</u> Separation + 1-year	Department preference; Files maintained separately; Claims can be made for 30 years for toxic substance exposure; 8 CCR §3204(d)(1) et seq., 29 CFR 1910.1020(d)(1)(i) , GC §§12946, 12960 , 34090, 29 CFR 1627.3 , 29 CFR 1602.14 ; LC §1198.5 ; 29 USC 1113
Human Resources	HR-014	Recruitment and Testing File (Includes Advertisements, Applications for Unsuccessful Candidates, Job Brochures, Test Data, Testing Analysis and statistical Metric, Job Analysis, Rating Sheets, Scantrons, Rater's Profile and Confidentiality Agreement, Flowchart, Eligible Lists, etc.)	Hiring Decision + <u>4</u> <u>3</u> years		Mag, <u>Mfr</u> , <u>OD</u> , Ppr	S / I	Yes: After <u>QC & OD</u>	Department preference; State Law requires <u>4</u> 2-3 years EEOC / FLSA / ADEA (Age) requires 1-3 years; ; 29 CFR 1627.3(b)(1), 29 CFR 1602.14 et seq. 2-CCR 7287.0(e)(2) ; 2 CCR 11013(c) ; GC §§12946, 12960 , 34090
Human Resources	HR-015	Studies and Surveys Conducted on Behalf of the City (Sick Leave, Attrition, Benefits, etc.)	When No Longer Required		Mag, <u>Mfr</u> , <u>OD</u> , Ppr	S / I	Yes: After <u>QC & OD</u>	Preliminary drafts not retained in the ordinary course of business; GC §34090
Human Resources	HR-015.5	Verifications of Employment, Child Support, etc.	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After <u>QC & OD</u>	Not a City record / Content does NOT relate in a substantive way to the conduct of the public's business; GC §34090 et seq

RECORDS RETENTION SCHEDULE: HUMAN RESOURCES

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Human Resources	HR-016	Workers Compensation Claim Runs / Monthly Reports	5 years		Mag, <u>Mfr</u> , <u>OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	Meets auditing standards; GC §34090
Human Resources	HR-017	Workers Compensation Claims / Long Term Disability Claims	Separation + 30 years, or Termination of Benefits + <u>5 years</u> , whichever is longer	Yes: Until Separation	Mag, Mfr, OD, Ppr	<u>S / I</u>	Yes: After <u>QC & OD</u> Separation + 1 year	Department preference; Files maintained separately; Claims can be made for 30 years for toxic substance exposure; 8 CCR §3204(d)(1) et seq., <u>29 CFR 1910.1020(d)(1)(i)</u> , GC §§12946, <u>12960, 34090, 29 CFR 1627.3, 29 CFR 1602.14; LC §1198.5; 29 USC 1113</u>
<u>Human Resources</u>	<u>HR-018</u>	<u>Workplace Violence – Hazard identification, evaluation, correction, incident logs, investigations, Training, etc.</u>	<u>5 years</u>		<u>Mag, Ppr</u>			<u>LC §6401.9(f), GC §34090</u>

RECORDS RETENTION SCHEDULE: INFORMATION TECHNOLOGY

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
INFORMATION TECHNOLOGY								
Information Technology	IT-001	Backups - Computer Backups (ALL Disaster Recovery Computer Backups) DAILY (Monday -Thursday)	When No Longer Required	Yes	Mag.			Used for Disaster Recovery Purposes Only; Considered a copy and can be destroyed when no longer required; tapes are in autochangers and are overwritten ; GC §34090 et seq.
Information Technology	IT-002	Backups - WEEKLY	When No Longer Required	Yes	Mag.			Used for Disaster Recovery Purposes Only; Store off-site in commercial storage for disaster recovery; Considered a copy and can be destroyed when no longer required; retention based on administrative value; recycle tapes; GC §34090 et seq.
Information Technology	IT-003	Network Configuration Maps and Plans	When No Longer Required	Yes	Mag.			Preliminary documents not retained in the ordinary course of business; GC §34090 et seq.
Information Technology	IT-004	Recordings - Video Recordings (Doors, Hallways, Public Areas, etc.) See City Clerk's schedule for City Council Video Recordings	When No Longer Required		Mag			Does not record regular ongoing operations of the City; GC §34090.6(a)
Information Technology	IT-005	UNALTERABLE MEDIA / IMMUTABLE MEDIA (CLOUD IMMUTABLE BACKUP) / WORM / DVD-r / CD-r / Blue Ray-R or other unalterable media that does not permit additions, deletions, or changes	P Follows Retention of Official Electronic Record		OD			For legal compliance for Trustworthy Electronic Records (when the electronic record serves as the official record); must be stored in a "safe and separate location" ; GC 34090, 12168.7, EVC 1550, 2 CCR 22620 et seq.

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
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<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
PLANNING								
Planning	PL-001	Alcohol Beverage Control License Applications (ABC Applications)	When No Longer Required		Mag, Mfr. , OD , Ppr	S / I	Yes: After QC & OD	(Non-Records)
Planning	PL-002	Annexations / Boundaries / Consolidations / LAFCO	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Land Records; GC §34090
Planning	PL-003	Census, Demographics	When No Longer Required		Mag, Mfr. , OD , Ppr	S / I	Yes: After QC & OD	(Non-Records - Census Bureau is OFR)
Planning	PL-004	Director's Hearings AGENDA PACKETS and AGENDAS	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Original Staff Reports are filed in the project file; Brown Act challenges must be filed within 30 or 90 days of action; GC §§34090, 54960.1(c)(1)
Planning	PL-005	Director's Hearings Recordings - AUDIO RECORDINGS of Meetings / Audio Tapes	2 years		Tape (Mag)			Department preference; State law only requires for 30 days; GC §54953.5(b)
Planning	PL-006	Director's Hearings RESOLUTIONS	P	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD No	GC §34090
Planning	PL-006.1	Environmental Determinations: Environmental Impact Reports (EIRs), Negative Declarations, Categorical Exemptions, etc.) / CEQA / NEPA Correspondence and staff notes that provide insight into the project or the agency's CEQA compliance with respect to the project	Project Approval or Denial + 2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Not all internal communications and notes are required to be saved: "E-mails that do not provide insight into the project or the agency's CEQA compliance with respect to the project — are not within the scope of section 21167.6, subdivision (e) and need not be retained." Golden Door Properties, LLC v. Superior Court of San Diego County (2020), 53 Cal.App.5th 733;GC §34090

RECORDS RETENTION SCHEDULE: PLANNING

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Planning	PL-007	Environmental Determinations: Environmental Impact Reports (EIRs), Negative Declarations, etc.) Inside City boundaries	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Usually filed in the project file; Final environmental determinations are required to be kept a "reasonable period of time"; 14 CCR §15095(c); GC §34090
Planning	PL-008	Environmental Determinations: Environmental Impact Reports (EIRs), Negative Declarations, etc.) Outside City boundaries	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Non-records; EIRs and Negative Declarations within the City Boundaries are with the project file
Planning	PL-009	General Plan, Elements and Amendments	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	City Clerk Maintains all Agenda Packets Permanently; GC §34090.7
Planning	PL-010	Historical Preservation	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
Planning	PL-011	Home Occupation Permits	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
Planning	PL-012	Master Plans, Specific Plans, Bikeway Plans, Landscaping Plans, Street Master Plans, etc.	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
Planning	PL-013	Materials Boards	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Preliminary drafts not retained in the ordinary course of business; GC §34090
Planning	PL-014	Planning Commission AGENDA PACKETS and AGENDAS	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Original Staff Reports are filed in the project file; Brown Act challenges must be filed within 30 or 90 days of action; GC §§34090, 54960.1(c)(1)
Planning	PL-015	Planning Commission Recordings - AUDIO RECORDINGS of Meetings / Audio Tapes	2 years		Tape (Mag)			Department preference; State law only requires for 30 days; GC §54953.5(b)

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<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Planning	PL-016	Planning Commission Recordings - VIDEO RECORDINGS of Meetings / Video Tapes	Minimum 10 years		Tape -(Mag)			Department preference; Video recording of meetings are only required for 90 days; GC §§34090.7, 34090
Planning	PL-017	Planning Commission MINUTES / RESOLUTIONS / BYLAWS	P	Yes	Mag, Mfr, OD, Ppr	S / I	<u>Yes: After QC & OD</u> No	GC §34090
Planning	PL-018	Planning Project Files / Coastal Permit Files - Approved Permanent Entitlements (Includes Associated CEQA Noticing, Conditions of Approval, Public Noticing, Environmental Determinations, Staff Reports, Plans and Maps) Examples: Conditional Use Permits (CUPs), Design Review, Lot Line Adjustments, Parcel Maps, Planned Unit Developments (PUD), Site Plans, Tentative Subdivisions, Variances, Zone Changes, etc.	P	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; Final environmental determinations are required to be kept a "reasonable period of time"; 14 CCR §15095(c); GC§§34090, 34090.7
Planning	PL-019	Project Log Index / Spreadsheet / Binders of Historic Actions	P	Yes	Mag, Mfr, OD, Ppr	S / I	<u>Yes: After QC & OD</u> 1-year	Department Preference; GC §34090
Planning	PL-020	Special Studies	Minimum 2 years		Mag, <u>Mfr, OD</u> , Ppr	S / I	<u>Yes: After QC & OD</u>	Department Preference; GC §34090
Planning	PL-021	Temporary Entitlements / Temporary Permits (Approved and Unapproved): Christmas Tree Lots , Banner Permits, Pumpkin Lots, Temporary Signs, etc.	2 years	Yes: During Event	Mag, <u>Mfr, OD</u> , Ppr	S / I	<u>Yes: After QC & OD</u>	Temporary uses; Department maintains complete files for administrative purposes; GC§§34090

RECORDS RETENTION SCHEDULE: PLANNING

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Planning	PL-022	Zoning Maps (Historically Significant)	P	Yes (all)	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD No	Department Preference; City Clerk Maintains originals of all documents that were presented to Council; GC §34090.7
Planning	PL-023	Zoning Ordinance Amendments, Reclassifications / Zone Change	P	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD 1-year	Department Preference (copies); GC §34090.7

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<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
PUBLIC WORKS / MAINTENANCE								
Public Works / Maint.	PW-001	AQMD Permits (Air Quality Management District Permits)	5 years		Mag, <u>Mfr.</u> , <u>OD</u> , Ppr	<u>S</u> / <u>I</u>	<u>Yes: After QC & OD</u>	40 CFR 70.6; GC §34090
Public Works / Maint.	PW-002	Generator Operation Logs (for fixed / stationary generators) / Inspections	<u>5</u> 2-years		Mag, <u>Mfr.</u> , <u>OD</u> , Ppr	<u>S</u> / <u>I</u>	<u>Yes: After QC & OD</u>	<u>AQMD Rule 1470; Form 400-E-13a instructions, Department Preference (2-years is required by AQMD);</u> GC §34090
Public Works / Maint.	PW-003	Operations and Maintenance Manuals (O and M Manuals)	Life of Facility or Equipment		Mag, <u>Mfr.</u> , <u>OD</u> , Ppr	<u>S</u> / <u>I</u>	<u>Yes: After QC & OD</u>	Department Preference; GC §34090 et. seq.
Public Works / Maint.	PW-004	Pressure Vessel Certifications or Permits (Air Compressors, Propane, etc.)	Expiration of Certificate or Permit - Minimum 2 years		Mag, Mfr, OD, Ppr	<u>S</u> / <u>I</u>	Yes: After <u>QC & OD</u> 4- year	Department preference; GC §34090 et. seq.
Public Works / Maint.	PW-005	Pre-Trip Inspections / DOT Program / CHP Inspections / Vehicle Safety Checks / Daily Vehicle Inspections / Daily Equipment Checks	2 years		<u>Mag</u> , <u>Mfr.</u> , <u>OD</u> , Ppr	<u>S</u> / <u>I</u>	<u>Yes: After QC & OD</u>	13 CCR 1234(e); <u>VC 34505.5(c); 49 CFR 396.11;</u> GC §34090
Public Works / Maint.	PW-006	Smog Certificates	Superseded		Mag, <u>Mfr.</u> , <u>OD</u> , Ppr	<u>S</u> / <u>I</u>	<u>Yes: After QC & OD</u>	Department Preference; GC §34090
Public Works / Maint.	PW-007	Used Oil Disposal	3 years		Mag, <u>Mfr.</u> , <u>OD</u> , Ppr	<u>S</u> / <u>I</u>	<u>Yes: After QC & OD</u>	22 CCR 66266.130(c)(5), H&S §25250.18(b), 25250.19(a)(3) et seq.
Public Works / Maint.	PW-008	Vehicle and Equipment History Files Maintenance, Smog Certificates, Registrations	Disposal of Vehicle or Equipment + 2 years		Mag, <u>Mfr.</u> , <u>OD</u> , Ppr	<u>S</u> / <u>I</u>	<u>Yes: After QC & OD</u>	Department Preference; If a motor carrier, required for 18 months after vehicle is sold; CHP requires life of vehicle; OSHA requires 1 year; 8 CCR § 3203(b)(1); 49 CFR 396.21(b)(1); 49 CFR 396.3(c); CCP §337 et. seq., 3 CCR 1234(f); GC §34090
Public Works / Maint.	PW-009	Work Logs / Work Sheets/ Grid Inspections	2 years		<u>Mag</u> , <u>Mfr.</u> , <u>OD</u> , Ppr	<u>S</u> / <u>I</u>	<u>Yes: After QC & OD</u>	GC §34090

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged and QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards .</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
HOLDS: <i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Public Works / Maint.	PW-010	Work Orders / Service Requests CMMS DATABASE (Computerized Maintenance Management System)	Indefinite - <u>Minimum 5 years</u>		Mag, <u>Mfr.</u> , <u>OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	Data is interrelated; <u>Databases where sewer records may be stored are required for 5 years; SWRCB Order 2022-0103-DWQ; CCP §§338 et seq., 340 et seq., 342, GC §34090</u>
Public Works / Maint.	PW-011	Work Orders / Service Requests - All Information Entered in CMMS Database (Paper drafts)	When No Longer Required		Mag, <u>Mfr.</u> , <u>OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	Preliminary drafts (the database is the original); GC §34090
Public Works / Maint.	PW-012	Work Orders / Service Requests - NOT entered in CMMS Database (or partial information entered into CMMS Database) (Division providing service retains originals; Division requesting service is considered a copy)	5 years		Mag, <u>Mfr.</u> , <u>OD</u> , Ppr	<u>S / I</u>	<u>Yes: After QC & OD</u>	City Preference; <u>May contain sewer records, which are required for 5 years; SWRCB Order 2022-0103-DWQ; CCP §§338 et seq., 340 et seq., 342, GC §§945-6, GC §34090</u>

BUSINESS OF THE COUNCIL OF THE CITY OF HALF MOON BAY

AGENDA REPORT

For meeting of: **September 16, 2025**

TO: Honorable Mayor and City Council

VIA: Matthew Chidester, City Manager

FROM: Maz Bozorginia, Public Works Director/City Engineer
Dale Leda, Associate Engineer

TITLE: RESOLUTION OF SUPPORT FOR GRANT APPLICATION TO THE SAN MATEO COUNTY TRANSPORTATION AUTHORITY FOR THE MEASURE A AND W 2025 HIGHWAY PROGRAM FOR THE HIGHWAY 1 MAIN STREET TO KEHOE AVENUE PROJECT

RECOMMENDATION:

Adopt a resolution:

1. Directing staff to submit a grant application to the San Mateo County Transportation Authority (TA) for Measures A and W Highway Program funds for \$11,700,000 in grant funding from the TA with a \$1,300,000 local match for the Highway 1 Main Street to Kehoe Avenue Project;
2. Authorizing the City Manager, or their designee, to execute a funding agreement or memorandum of understanding and any amendments with the TA to encumber Measures A and W Highway Program funds should the applications be successful;
3. Committing to the completion of the Project, including the required local funding contribution of \$1,300,000, should the application be successful;
4. Certifying that any funds awarded by the TA will be used to supplement existing funds for program activities, and will not replace existing funds or resources; and
5. Authorizing the City Manager, or their designee, to take any other actions necessary to give effect to this resolution and execute applicable amendments.

FISCAL IMPACT:

If the City is awarded the grant, a funding match of 10% of total project costs is required. For the grant-related project cost total of \$13,000,000, the City's required match is \$1,300,000. Funding for the match would come from the Streets and Road Fund and would be comprised of accrued funds from San Mateo County Measure A and W sales tax revenue. Measure A and W funds being allocated for the project are only eligible for use on street improvement and

congestion reduction projects and will not have an impact on the City's structural deficit or general fund reserves.

STRATEGIC ELEMENT:

This recommendation supports the *Infrastructure and Environment*, and *Healthy Communities, and Public Safety* Elements of the Strategic Plan.

BACKGROUND:

The Highway 1 North project includes a new signalized intersection at Terrace Avenue and Highway 1 to provide a safe east-west crossing for pedestrians/bicyclists, protected turn movements for automobiles, consolidated access from Grand Boulevard and Frontage Road, as well as improvements to the Naomi Patridge Trail connection (across the previous access points to Highway 1). The project also includes a bicycle/pedestrian (Class I) path from North Main Street to Spindrift Way on the east side (Eastside Parallel Trail) of the highway as well as extension of the four-lane highway configuration north to just south of Grandview Blvd with improved turning lanes, center median improvements, and green infrastructure. Bus stops will also be improved in this area to meet current ADA requirements and provide enhanced experience for transit riders.

The project is currently in the final stages of design permitting with the California Department of Transportation (Caltrans). In April 2025, Caltrans authorized the design team to move forward with submitting the 100% design level plans, specifications, and estimates for final review by Caltrans. Subsequently, Caltrans assigned a new project manager for the project and issued approximately 120 additional plan check comments on the current design. Some of the comments are significant in nature and are expected to substantially increase the cost of project construction.

At the same time, City staff have continually monitored escalation in construction costs over the last two years and in particular, sharp rises in costs in early 2025 through the review of bidding on similar projects and have regularly adjusted the project's estimated cost of construction. As of early September, the project design team has produced an updated engineers estimate that puts the estimated construction cost at \$21,000,000 and overall project delivery costs at around \$25,000,000, which includes accrued design costs to date, final design, project management, construction, construction support and related services. The City currently has approximately \$12,500,000 funding available for the project from various sources, including the General Fund, traffic impact fees, and three separate prior grant fund allocations from SMCTA, which leaves an approximately \$12,500,000 anticipated budget shortfall.

Staff has met regularly with the TA through early 2025 to provide updates on the project status and discuss the budget shortfall, and have received considerable support and encouragement from the TA toward submittal of an application to the Measure A & W Highway Program 2025 Call for Projects, which was formally announced in July 2025.

Staff has worked diligently on an application which was submitted to SMCTA before the application due date on Friday, September 12, 2025, and included a mandatory draft resolution included as Attachment 1 below.

DISCUSSION:

The purpose of the Measure A & W Highway Program is to reduce congestion and improve safety on highways in San Mateo County. The Highway 1 Main Street to Kehoe Avenue project, also known locally as the Highway 1 Safety and Mobility North project, addresses several different issues concerning congestion, vehicle, bike and pedestrian safety along this critical section of the Highway 1 Corridor.

Improvements at Terrace Avenue including the new signalized intersection and mid-block pedestrian crossings will provide a major benefit for bicycle and pedestrian trail users, allowing safe travel between the east and west sides of Highway 1, opening access to the Naomi Patridge and Eastside Parallel Trail, the Coastal Trail, and transit bus stops in both northbound and southbound directions. Completion of the Eastside Parallel Trail extension will provide direct bicycle and pedestrian access from the Spindrift and Terrace Avenue neighborhoods to points south, including direct connection to Half Moon Bay schools, library, downtown and employment centers, and will be a vital transportation link for the residents of the coast.

New coordinated timing of the traffic lights at Main Street and Terrace Avenue, and the extension of merge taper lanes in both directions will also improve vehicle flow during high traffic times. The consolidation of four existing un-controlled access points onto the highway into one signalized intersection will further enhance both pedestrian and vehicular safety existing and entering the highway. The idea for the project, originally hatched in 2012 and refined and expanded over the years to its current form, has the potential to be a transformative component of the City's planned infrastructure along Highway 1.

CONCLUSION:

City staff recommends the City Council adopt a resolution authorizing the submittal of the grant application, authorizing the City Manager (or their designee) to execute funding agreements and memorandums of understanding with the San Mateo County Transportation Authority to encumber the Measures A and W funds, committing the required local matching funds, certifying that awarded funds will supplement, but not supplant, existing funding commitments and authorizing the City Manager (or their designee) to take any other actions necessary to give effect to this resolution and execute applicable amendments.

ATTACHMENTS:

Resolution – Highway 1 Main Street to Kehoe Avenue Project

RESOLUTION NO. C-2025 –65

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF HALF MOON BAY TO SUPPORT AN APPLICATION TO THE SAN MATEO COUNTY TRANSPORTATION AUTHORITY 2025 MEASURE A AND MEASURE W HIGHWAY PROGRAM CALL FOR PROJECTS FOR THE HIGHWAY 1 MAIN STREET TO KEHOE AVENUE PROJECT

WHEREAS, the City of Half Moon Bay (Sponsor) has identified a need for improved vehicle and pedestrian safety and access improvements along Highway 1 between Main Street and Kehoe Avenue; and

WHEREAS, the Sponsor has developed the Highway 1 Main Street to Kehoe Avenue project, also referred to as the Highway 1 Safety and Operational Improvement North project (Project) to install a new signalized intersection at Terrace Avenue, extend northbound lane tapers to Grandview Boulevard, provide a new class 1 multi-use trail along the east side of the highway extending from Main Street to Kehoe Avenue, consolidate access points along the highway from Frontage Road, Grand Boulevard, and Terrace Avenue; and

WHEREAS, the Project estimated costs, including Design, Construction and related support, are estimated to be \$25,000,000; and

WHEREAS, the Sponsor seeks \$11,700,000 in grant funds from the San Mateo County Transportation Authority (TA) for the Project while the City of Half Moon Bay has committed to \$1,300,000 in local funds; and

WHEREAS, the Primary Grant Agreement was approved by the City Council on February 18, 2025, and was executed between the Sponsor and the TA on March 19, 2025; and

WHEREAS, the San Mateo County Transportation Authority (TA) issued a Call for Projects for the 2025 Measure A and Measure W Highway Program on July 11, 2025; and

WHEREAS, the TA requires the Sponsor’s governing board to adopt a resolution:

1. Supporting the Project and application for \$11,700,000 in TA Measure A and W Highway Program funds for the Project;
2. Committing the Sponsor to begin work within one year of an award, and to the completion of the requested scope of work for the Project, including the commitment of matching funds in the amount of \$1,300,000 needed for implementation;
3. Certifying that any funds awarded by the San Mateo County Transportation Authority will be used to supplement existing funds for program activities, and will not replace existing funds or resources; and

4. If funds are awarded, authorize the City Manager, or designee, to sign a supplement agreement and any amendments of the TA's Primary Grant Agreement with the TA for TA Measures A and W Highway Program funding for the Project and to take any other actions necessary to give effect to this resolution and execute applicable amendments

NOW, THEREFORE, BE IT RESOLVED that the City Council of the City of Half Moon Bay:

1. Directs staff to submit an application to the San Mateo County Transportation Authority for Measure A and W Highway Program funds for \$11,700,000 for Highway 1 Main Street to Kehoe Avenue Project;
2. Authorizes the City Manager or his/her designee to execute a supplemental agreement and any amendments of the TA's Primary Grant Agreement with the San Mateo County Transportation Authority to encumber any TA Measure A and W Highway Program funds;
3. Commits to the completion of the Project, including the commitment of \$1,300,000 of matching funds needed for the requested Project's scope of work implementation, if the requested TA funds are awarded;
4. Certifies that any funds awarded by the TA will be used to supplement existing funds for the Project and will not replace existing funds or resources; and
5. Authorizes the City Manager or his/her designee to take any other actions necessary to give effect to this resolution and execute applicable amendments.

I, the undersigned, hereby certify that the foregoing Resolution was duly passed and adopted on the 16th day of September 2025, by the City Council of Half Moon Bay by the following vote:

AYES, Councilmembers:

NOES, Councilmembers:

ABSENT, Councilmembers:

ABSTAIN, Councilmembers:

ATTEST:

APPROVED:

Maggie Rodriguez, Assistant City Clerk

Robert Brownstone, Mayor

BUSINESS OF THE COUNCIL OF THE CITY OF HALF MOON BAY

AGENDA REPORT

For meeting of: **September 16, 2025**

TO: Honorable Mayor and City Council
VIA: Matthew Chidester, City Manager
From: Lisa Rossi, Administrative Services Director
TITLE: **WARRANTS FOR THE MONTH OF AUGUST 2025**

RECOMMENDATION:

Accept the warrants list for the month of August 2025.

STRATEGIC ELEMENT:

This recommendation supports the *Fiscal Sustainability* and *Inclusive Governance* Elements of the Strategic Plan.

DISCUSSION:

During this month, the City processed 5 check runs. The table below outlines each check run and their individual totals:

Check Run Date	Amount
August 04	28,726
August 07	759,161
August 14	101,098
August 21	724,039
August 28	267,218
Total	1,880,242

The City processed payments related to 11 capital improvement projects, totaling \$157,788: Highway 1 Safety - North, Carter Park, Eastside Parallel Trail Expansion, Emergency Response Program, Pilarcitos Creek Restoration, LCP Implementation Project, Climate Action And Adaptation, Smith Field Site Assessment, HVAC Repair, Pedal For a Purpose, and Pedestrian/Bicycle Connection.

Staff has included a list of all vendors who received \$30,000 or more during this reporting period, as shown in the table below.

City of Half Moon Bay			
Vendor Payments Exceeding \$30,000			
By Vendor and Funding Source			
August 2025			
Payee	General Fund	Other Funds	Description
4LEAF INC.	66,883	305	ON-CALL BUILDING INSPECTION SERVICES
HDL SOFTWARE LLC	38,687	-	APR, MAY, JUNE '25 TOT AND BUSINESS LICENSE MANAGEMENT
HMB COASTSIDE CHAMBER	36,670	14,588	JUNE '25 BID, JULY '25 OPERATIONS AND MAINTENANCE OF OCC
JOBTRAIN INC	-	32,298	JUNE '25 JOB-SEEKER WORKFORCE DEVELOPMENT PROGRAM SERVICES
MARK THOMAS & CO, INC	-	42,896	HWY 1 SAFETY AND OPERATIONAL IMPROVEMENTS
PACIFIC GAS & ELECTRIC	40,962	7,285	JUNE, JULY '25 CITYWIDE GAS AND ELECTRICITY
SCHAPER HEATING AND COOLING	-	44,553	HVAC WORK AT TED ADCOCK COMMUNITY CENTER
SEWER AUTHORITY MID-COASTSIDE	-	1,043,784	JULY, AUG '25 OPERATIONS AND MAINTENANCE
SHUTE MIHALY & WEINBERGER LLP	108,087	2,867	JULY '25 CITY ATTORNEY SERVICES - GENERAL MATTERS AND OTHERS

ATTACHMENTS:

Attachment 1 - Check Disbursement List by Check Date

Report Criteria:
 Report type: GL detail

4LEAF INC.				
56853	4LEAF INC.	08/21/2025	JUNE 2025 PROFESSIONAL SERVICES	3,819.43
56853	4LEAF INC.	08/21/2025	JUNE 2025 BUILDING OFFICIAL SERVICES	8,085.00
56853	4LEAF INC.	08/21/2025	JUNE 2025 SENIOR COMB. BUILDING INSPECTOR	19,278.56
56853	4LEAF INC.	08/21/2025	FY 25/26 ON-CALL BUILDING INSPECTION, OFFICIAL & PLAN REVIEW SERVICES	9,240.00
56853	4LEAF INC.	08/21/2025	FY 25/26 ON-CALL BUILDING INSPECTION, OFFICIAL & PLAN REVIEW SERVICES	21,617.68
56853	4LEAF INC.	08/21/2025	FY 25/26 ON-CALL BUILDING INSPECTION, OFFICIAL & PLAN REVIEW SERVICES	4,842.77
56853	4LEAF INC.	08/21/2025	STONE PINE AFFORDABLE HOUSING PORTION	305.00
Total 4LEAF INC.:				<u>67,188.44</u>
ABAG POWER PURCHASING POOL				
56858	ASSOCIATION OF BAY AREA GOVERNMENTS	08/21/2025	FY 26 LEVELIZED CHARGE-NAT GAS	630.00
56858	ASSOCIATION OF BAY AREA GOVERNMENTS	08/21/2025	WORKING CAPITAL DEPOSIT	22.78
Total ABAG POWER PURCHASING POOL:				<u>652.78</u>
ABUNDANT GRACE COASTSIDE WORKER				
56796	ABUNDANT GRACE COASTSIDE WORKER	08/07/2025	JUNE '25-PROVIDE HOMELESS COASTAL CLEAN UP SERVICES	7,180.00
56831	ABUNDANT GRACE COASTSIDE WORKER	08/14/2025	JULY-PROVIDE HOMELESS COASTAL CLEAN-UP SERVICES	6,460.00
56854	ABUNDANT GRACE COASTSIDE WORKER	08/21/2025	JUNE ADDITIONAL-PROVIDE HOMELESS ENCAMPMENT CLEAN UP SERVICES	2,800.00
56854	ABUNDANT GRACE COASTSIDE WORKER	08/21/2025	JULY ADDITIONAL-PROVIDE HOMELESS ENCAMPMENT CLEAN-UP SERVICES	700.00
Total ABUNDANT GRACE COASTSIDE WORKER:				<u>17,140.00</u>
ALEJANDRO VELASCO				
56797	ALEJANDRO VELASCO	08/07/2025	REFUND DEPOSIT-TRAIN DEPOT 8/2/25	500.00
Total ALEJANDRO VELASCO:				<u>500.00</u>
ALTA PLANNING & DESIGN INC.				
56855	ALTA PLANNING & DESIGN	08/21/2025	AMENDMENT 4 BIKEWAY NORTH ADDITIONAL COSTS	497.50
Total ALTA PLANNING & DESIGN INC.:				<u>497.50</u>
AMERICAN DEBRIS BOX SERVICE INC.				
56798	AMERICAN PORTABLES	08/07/2025	OCEAN COLONY- PORTABLE TOILETS	1,139.80
56798	AMERICAN PORTABLES	08/07/2025	FY 25/26 PORTABLE TOILET RENTAL AND SERVICES	1,305.00
56798	AMERICAN PORTABLES	08/07/2025	FY 25/26 PORTABLE TOILET RENTAL AND SERVICES	2,800.00
56798	AMERICAN PORTABLES	08/07/2025	FY 25/26 PORTABLE TOILET RENTAL AND SERVICES	4,362.00

56856	AMERICAN DEBRIS BOX SERVICE, INC	08/21/2025	DEBRIS BOXES-GARBAGE STRIKE	2,956.00
56891	AMERICAN PORTABLES	08/28/2025	FY 25/26 PORTABLE TOILET RENTAL AND SERVICES	1,139.80
56891	AMERICAN PORTABLES	08/28/2025	FY 25/26 PORTABLE TOILET RENTAL AND SERVICES	200.00
Total AMERICAN DEBRIS BOX SERVICE INC.:				13,902.60
AMERICAN ENERGY SOCIETY				
56857	AMERICAN ENERGY SOCIETY	08/21/2025	JULY '25-TO OPERATE COASTSIDE VENTURE STUDIO (CSVS) - A BUSINESS INCUBATOR VIA THE OPPORT	22,618.85
Total AMERICAN ENERGY SOCIETY:				22,618.85
AMY SULLIVAN				
56799	AMY SULLIVAN	08/07/2025	CLASS REFUND-CREATIVE FLOW	208.30
Total AMY SULLIVAN:				208.30
ANA DORIA-QUESADA				
56800	ANA DORIA-QUESADA	08/07/2025	INSTRUCTOR-CREATIVE FLOW-1 CLASS	29.12
Total ANA DORIA-QUESADA:				29.12
BAIRD DRISKELL ABRAMS COMMUNITY PLANNIN				
56892	BAIRD DRISKELL ABRAMS COMMUNITY PLANNI	08/28/2025	AUGUST '24-DOCUMENT REVIEW, SUPPORT FOR COMMUNITY OUTREACH & ENGAGEMENT, & ONGOI	1,268.75
56892	BAIRD DRISKELL ABRAMS COMMUNITY PLANNI	08/28/2025	APRIL '25-DOCUMENT REVIEW, SUPPORT FOR COMMUNITY OUTREACH & ENGAGEMENT, & ONGOING	7,170.00
56892	BAIRD DRISKELL ABRAMS COMMUNITY PLANNI	08/28/2025	MARCH '25-DOCUMENT REVIEW, SUPPORT FOR COMMUNITY OUTREACH & ENGAGEMENT, & ONGOI	2,356.25
Total BAIRD DRISKELL ABRAMS COMMUNITY PLANNIN:				10,795.00
BECKER GRAPHICS				
56802	BECKER GRAPHICS	08/07/2025	INSTRUCTOR PAYMENT- ZUMBA JULY'25	644.00
Total BECKER GRAPHICS:				644.00
BGT LAND SURVEYING				
56893	BGT LAND SURVEYING	08/28/2025	HATCH BIKE CONNECTION-BOUNDARY & TOPOGRAPHIC SURVEY	4,200.00
Total BGT LAND SURVEYING:				4,200.00
BIKE WORKS HMB				
56861	BIKE WORKS HMB	08/21/2025	PEDAL FOR A PURPOSE - #3841	8,364.00
Total BIKE WORKS HMB:				8,364.00

BLEYLE ELEVATOR, INC

56832	BLEYLE ELEVATOR, INC	08/14/2025	MAINT SERVICE #102236 501 MAIN ELEVATOR	95.00
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Total BLEYLE ELEVATOR, INC:				95.00
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CALNET3

56859	AT&T	08/21/2025	JULY'25 PHONE SERVICE	1,032.72
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56860	AT&T MOBILITY	08/21/2025	JULY'25 PHONE SERVICE	2,797.37
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Total CALNET3:				3,830.09
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CASELLE INC.

56803	CASELLE INC.	08/07/2025	FY 25/26 CASELLE ERP SOFTWARE - AUG	4,238.00
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56862	CASELLE INC.	08/21/2025	FY 25/26 CASELLE ERP SOFTWARE - SEPT	4,238.00
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Total CASELLE INC.:				8,476.00
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CLEARLITE TROPHIES

56863	CLEARLITE TROPHIES	08/21/2025	ENGRAVED PLAQUE	153.27
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Total CLEARLITE TROPHIES:				153.27
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COAST RIDGE ECOLOGY

56833	COAST RIDGE ECOLOGY	08/14/2025	BIO SERVICES WAVE AVE PDP-24-007	290.00
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56833	COAST RIDGE ECOLOGY	08/14/2025	BIO SERVICES WAVE AVE PDP-24-007	290.00
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56833	COAST RIDGE ECOLOGY	08/14/2025	BIO SERVICES WAVE AVE PDP-24-007	290.00-
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Total COAST RIDGE ECOLOGY:				290.00
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COASTSIDE COUNTY WATER DISTRICT

56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	501 MAIN ST	231.96
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56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	501 MAIN ST_DC	44.86
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56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	CITY OF HMB/ COAST.COMM.SENIOR CNTR.	44.86
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56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	503 JOHNSTON ST	126.36
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56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	MEDIAN STRIP/ HWY ONE # IRRIGATION	38.36
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56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	1310 LORYN LN # IRRIGATION	214.36
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56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	723 MILL ST # IRRIGATION	38.36
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56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	461 OAK AVE	38.36
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56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	FERNANDES PARK/ MAIN ST # IRRIGATION	73.56
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56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	555 KELLY AVE	87.60
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56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	LIFT STATI FAIRWAY DR	38.36
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56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	535 KELLY AVE	294.46
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56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	537 KELLY AVE	123.72
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56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	201 WAVECREST RD	3,292.69
56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	HIGGINS CYN RD	601.56
56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	529 RUISSEAU FRANCAIS AVE # IRRIGATION	844.49
56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	627 ALSACE LORAINNE AVE	407.96
56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	502 MAIN ST	302.36
56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	MAIN & HWY 1 # IRRIGATION	55.96
56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	HWY 92 MEDIAN # WEST IRRIG	38.36
56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	HWY 92 MEDIAN # EAST IRRIG	38.36
56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	620 CORREAS/LIBRARY	457.29
56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	620 CORREAS/LIBRARY # DC	114.26
56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	620 CORREAS/LIBRARY # IRRIGATION	83.26
56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	10 STONE PINE RD # IRRIGATION	1,126.09
56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	880 STONE PINE RD # COMM	283.09
56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	HYDRANT METER	147.56
56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	FINAL-880 STONE PINE RD # MULTI FAM	3,152.09
56864	COASTSIDE COUNTY WATER DISTRICT	08/21/2025	FINAL-880 STONE PINE RD # IRRIGATION	2,467.07
Total COASTSIDE COUNTY WATER DISTRICT:				<u>14,807.63</u>
COASTSIDE PRINTERS				
56894	COASTSIDE PRINTERS	08/28/2025	ADA PARKING SIGNS	692.24
Total COASTSIDE PRINTERS:				<u>692.24</u>
COASTWEST FIRE PROTECTION				
56865	COASTWEST FIRE PROTECTION	08/21/2025	5 YEAR INSPECTIONS COMPLETED	3,800.00
56895	COASTWEST FIRE PROTECTION	08/28/2025	FIRE SPRINKLER REPAIRS-100 HIGGINS CANYON RD	2,225.00
Total COASTWEST FIRE PROTECTION:				<u>6,025.00</u>
COUNTY OF SAN MATEO				
56755	SAN MATEO COUNTY ENVIRONMENTAL HEALTH	08/28/2025	HEALTH INSPECTION-CITY HALL	525.00-
56755	SAN MATEO COUNTY ENVIRONMENTAL HEALTH	08/28/2025	HEALTH INSPECTION-OCEAN COLONY	525.00-
56755	SAN MATEO COUNTY ENVIRONMENTAL HEALTH	08/28/2025	HEALTH INSPECTION-TED ADCKOCK COMM CENTER	2,228.00-
56804	COUNTY OF SAN MATEO	08/07/2025	SMCO TRAINING CONSORTIUM FY25-26	620.00
56896	COUNTY OF SAN MATEO	08/28/2025	JULY'25 MICROWAVE MUX DSO	82.25
56909	SAN MATEO COUNTY ENVIRONMENTAL HEALTH	08/28/2025	HEALTH INSPECTION-CITY HALL	525.00
56909	SAN MATEO COUNTY ENVIRONMENTAL HEALTH	08/28/2025	HEALTH INSPECTION-OCEAN COLONY	525.00
Total COUNTY OF SAN MATEO:				<u>1,525.75-</u>
CRUZIO INTERNET				
56866	CRUZIO INTERNET	08/21/2025	INTERNET SERVICE	14.95

Total CRUZIO INTERNET:			14.95	
DAILY JOURNAL				
56846	SAN MATEO DAILY JOURNAL	08/14/2025	ADVERTISING-BPAC	1,728.00
56846	SAN MATEO DAILY JOURNAL	08/14/2025	ADVERTISING-LEGAL NOTICE	720.00
56846	SAN MATEO DAILY JOURNAL	08/14/2025	ADVERTISING-USER FEES UPDATE	864.00
56846	SAN MATEO DAILY JOURNAL	08/14/2025	ADVERTISING-MAIN ST SOLAR ARRAY	1,008.00
56846	SAN MATEO DAILY JOURNAL	08/14/2025	ADVERTISING-FINANCE CHARGE	66.24
56846	SAN MATEO DAILY JOURNAL	08/14/2025	ADVERTISING-FINANCE CHARGE	66.24
56846	SAN MATEO DAILY JOURNAL	08/14/2025	ADVERTISING-FINANCE CHARGE	20.16
Total DAILY JOURNAL:				4,472.64
EDDIE BEHLE				
56867	EDDIE BEHLE	08/21/2025	REIMBURSEMENT - SHAKESPEARE KEYS CARTER PARK	15.35
Total EDDIE BEHLE:				15.35
EL CENTRO DE LIBERTAD				
56805	EL CENTRO DE LIBERTAD	08/07/2025	CARES PROGRAM OPERATOR-JUNE 2025	25,315.47
Total EL CENTRO DE LIBERTAD:				25,315.47
ERNESTO HUERTA				
56806	ERNESTO HUERTA	08/07/2025	REFUND-DEPOSIT GRAND OAK 10/4/25	500.00
Total ERNESTO HUERTA:				500.00
FLYERS ENERGY LLC				
56834	FLYERS ENERGY, LLC	08/14/2025	JULY'25 FUEL	2,037.29
Total FLYERS ENERGY LLC:				2,037.29
GOOD CITY COMPANY				
56868	GOOD CITY COMPANY	08/21/2025	ASSISTANT PLANNER REVIEW SERVICES AS NEEDED PROVIDED BY GOOD CITY COMPANY	67.50
56868	GOOD CITY COMPANY	08/21/2025	ASSISTANT PLANNER REVIEW SERVICES AS NEEDED PROVIDED BY GOOD CITY COMPANY	438.75
56868	GOOD CITY COMPANY	08/21/2025	ASSISTANT PLANNER REVIEW SERVICES AS NEEDED PROVIDED BY GOOD CITY COMPANY	540.00
56868	GOOD CITY COMPANY	08/21/2025	ASSISTANT PLANNER SERVICES PDP-24-054	67.50
56868	GOOD CITY COMPANY	08/21/2025	ASSISTANT PLANNER SERVICES PDP-24-054	67.50
56868	GOOD CITY COMPANY	08/21/2025	ASSISTANT PLANNER SERVICES PDP-24-054	67.50
56868	GOOD CITY COMPANY	08/21/2025	ASSISTANT PLANNER REVIEW SERVICES AS NEEDED PROVIDED BY GOOD CITY COMPANY	303.75
56868	GOOD CITY COMPANY	08/21/2025	ASSISTANT PLANNER REVIEW SERVICES AS NEEDED PROVIDED BY GOOD CITY COMPANY	101.25

56868	GOOD CITY COMPANY	08/21/2025	ASSISTANT PLANNER REVIEW SERVICES AS NEEDED PROVIDED BY GOOD CITY COMPANY	135.00
56868	GOOD CITY COMPANY	08/21/2025	ASSISTANT PLANNER REVIEW SERVICES AS NEEDED PROVIDED BY GOOD CITY COMPANY	371.25
56868	GOOD CITY COMPANY	08/21/2025	ASSISTANT PLANNER REVIEW SERVICES AS NEEDED PROVIDED BY GOOD CITY COMPANY	67.50
Total GOOD CITY COMPANY:				<u>2,092.50</u>
GOVERNMENT REVENUE SOLUTIONS HOLDINGS i				
56801	AVENU INSIGHTS & ANALYTICS LLC	08/07/2025	SUTA MARCH 31	183.62
Total GOVERNMENT REVENUE SOLUTIONS HOLDINGS i:				<u>183.62</u>
GRANICUS LLC				
56897	GRANICUS LLC	08/28/2025	JULY'25, GRANICUS SERVICE	620.53
Total GRANICUS LLC:				<u>620.53</u>
HALF MOON BAY BUILDING & GARDEN				
56807	HALF MOON BAY BUILDING & GARDEN	08/07/2025	JUNE-PVC PIPE	64.90
56807	HALF MOON BAY BUILDING & GARDEN	08/07/2025	BROWN FLEX SWEEP BROOM	54.69
56835	HALF MOON BAY BUILDING & GARDEN	08/14/2025	FLEX SWEEP BROOM	54.69
56869	HALF MOON BAY BUILDING & GARDEN	08/21/2025	MIXED TOP SOIL	131.25
56869	HALF MOON BAY BUILDING & GARDEN	08/21/2025	SQUARE SHOVEL AND ALTLAS GLOVES	82.78
Total HALF MOON BAY BUILDING & GARDEN:				<u>388.31</u>
HDL SOFTWARE LLC				
56898	HDL SOFTWARE LLC	08/28/2025	APR '25-TOT AND BUSINESS LICENSE MANAGEMENT	18,434.84
56898	HDL SOFTWARE LLC	08/28/2025	MAY '25-TOT AND BUSINESS LICENSE MANAGEMENT	16,775.10
56898	HDL SOFTWARE LLC	08/28/2025	JUNE '25-TOT AND BUSINESS LICENSE MANAGEMENT	3,477.52
Total HDL SOFTWARE LLC:				<u>38,687.46</u>
HEAD AND HEART ADVISORY				
56808	HEAD AND HEART ADVISORY	08/07/2025	JULY '25-EVALUATION OF THREE ECONOMIC ADVANCEMENT CENTERS	7,150.00
Total HEAD AND HEART ADVISORY:				<u>7,150.00</u>
HELMUT SCHNEYDER				
56870	HELMUT SCHNEYDER	08/21/2025	REFUND-PLANNING DEPOSIT PD-23-046	1,130.00
Total HELMUT SCHNEYDER:				<u>1,130.00</u>

HIGH POINT ROOFING SERVICES

56809	HIGH POINT ROOFING SERVICES	08/07/2025	535 KELLY AVE - ROOF REPAIR	5,000.00
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Total HIGH POINT ROOFING SERVICES:				5,000.00
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HILARY STAMPER

56810	HILARY STAMPER	08/07/2025	INSTRUCTOR PAYMENT - LINE DANCING	3,297.00
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Total HILARY STAMPER:				3,297.00
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HMB COASTSIDE CHAMBER OF COMMERCE

56837	HMB COASTSIDE CHAMBER	08/14/2025	JULY-PROVIDE OPERATIONS MANAGEMENT & SUPPORT OF THE OCC	13,789.08
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56871	HMB COASTSIDE CHAMBER	08/21/2025	JULY-PROVIDE OPERATIONS MANAGEMENT & SUPPORT OF THE OCC	798.89
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56899	HMB COASTSIDE CHAMBER	08/28/2025	JUNE'25 BID (IN CITY)	32,452.00
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56899	HMB COASTSIDE CHAMBER	08/28/2025	JUNE'25 BID (OOC)	4,218.00
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Total HMB COASTSIDE CHAMBER OF COMMERCE:				51,257.97
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HUE & CRY SECURITY SYSTEMS INC.

56838	HUE & CRY SECURITY SYSTEMS INC.	08/14/2025	SEP'25 SECURITY SERVICE	197.77
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56838	HUE & CRY SECURITY SYSTEMS INC.	08/14/2025	SEP'25 SECURITY SERVICE	499.85
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56838	HUE & CRY SECURITY SYSTEMS INC.	08/14/2025	SEP'25 SECURITY SERVICE	24.00
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Total HUE & CRY SECURITY SYSTEMS INC.:				721.62
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INFINITY TECHNOLOGIES

56900	INFINITY TECHNOLOGIES	08/28/2025	JULY '25-IT HELPDESK	13,960.00
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56900	INFINITY TECHNOLOGIES	08/28/2025	JULY '25- IT HELPDESK	186.75
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Total INFINITY TECHNOLOGIES:				14,146.75
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INTEGRAL CONSULTING INC.

56811	INTEGRAL CONSULTING INC.	08/07/2025	MAY-JUNE-PREPARATION OF THE CLIMATE ADAPTION PLAN(CIP 1002)	11,276.76
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Total INTEGRAL CONSULTING INC.:				11,276.76
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JAMES J HENDERSON

56903	NEIGHBORHOOD RADIO	08/28/2025	ADVERTISING SERVICE-NATIONAL NITE OUT	125.00
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Total JAMES J HENDERSON:				125.00
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JOBTRAIN INC

56839	JOBTRAIN INC	08/14/2025	JUNE-TO PROVIDE JOB SEEKER WORKFORCE DEVELOPMENT PROGRAM SERVICES FOR THE COASTSIDE	32,298.21
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Total JOBTRAIN INC:			32,298.21
JOE BUTCHER			
56812	JOE BUTCHER	08/07/2025 STUDENT LOAN REIMBURSEMENT	3,000.00
Total JOE BUTCHER:			3,000.00
JOINT VENTURE: SILICON VALLEY NETWORK			
56813	JOINT VENTURE SILICON VALLEY	08/07/2025 PUBLIC INVESTMENT FY 2025	2,000.00
Total JOINT VENTURE: SILICON VALLEY NETWORK:			2,000.00
KARLAS JANITORIAL & SUPPLIERS, LLC			
56840	KARLAS JANITORIAL & SUPPLIERS, LLC	08/14/2025 FY 25/26 JANITORIAL SERVICES	15,513.50
56840	KARLAS JANITORIAL & SUPPLIERS, LLC	08/14/2025 JULY-PROVIDE CUSTODIAL SERVICES FOR THE OCC	785.00
Total KARLAS JANITORIAL & SUPPLIERS, LLC:			16,298.50
KATHY OLER			
56872	KATHY OLER	08/21/2025 FY 25/26 MILL STREET PARKING LOT-SEPT	2,362.28
Total KATHY OLER:			2,362.28
LAURA CAMODECA			
56814	LAURA CAMODECA	08/07/2025 INSTRUCTOR - CONTINUING ODOR	525.00
56814	LAURA CAMODECA	08/07/2025 INSTRUCTOR - CONTINUING ODOR ADVANCED	630.00
56814	LAURA CAMODECA	08/07/2025 INSTRUCTOR-INTRO K9 NOSE	546.00
56814	LAURA CAMODECA	08/07/2025 INSTRUCTOR - INTRO TO ODOR	315.00
Total LAURA CAMODECA:			2,016.00
LAUTZENHISER'S STATIONERY LLC			
56841	LAUTZENHISER'S STATIONARY	08/14/2025 MINUTE BOOKS	367.30
Total LAUTZENHISER'S STATIONERY LLC:			367.30
LORAL LANDSCAPING INC.			
56842	LORAL LANDSCAPING INC.	08/14/2025 FY 25/26 MEDIAN MAINTENANCE-AUG'25	4,297.00
Total LORAL LANDSCAPING INC.:			4,297.00

LORI LARUE				
56873	LORI LARUE	08/21/2025	REFUND-CLASS CANCELLED INTRO K9 NOSE	180.00
Total LORI LARUE:				180.00
MALCOLM C SMITH				
56815	MALCOLM C SMITH	08/07/2025	COMMUNICATIONS CONSULTANT SERVICE	1,320.00
Total MALCOLM C SMITH:				1,320.00
MARIAN ELIZABETH POTT				
56901	MARIAN ELIZABETH POTT	08/28/2025	INSTRUCTOR-BEG. BASIC DOG TRAINING	472.50
56901	MARIAN ELIZABETH POTT	08/28/2025	INSTRUCTOR-12 TO 12 PUPPIES AND BEYOND	1,102.50
Total MARIAN ELIZABETH POTT:				1,575.00
MARK THOMAS & CO. INC.				
56902	MARK THOMAS & CO, INC	08/28/2025	AMENDMENT 6 TO PSA FOR HWY 1 SAFETY & OPERATIONAL IMPRVEMENTS - ADDITONAL COORDINA	32,413.75
56902	MARK THOMAS & CO, INC	08/28/2025	AMENDMENT 6 TO PSA FOR HWY 1 SAFETY & OPERATIONAL IMPRVEMENTS - ADDITONAL COORDINA	10,481.75
Total MARK THOMAS & CO. INC.:				42,895.50
MATT NICHOLS				
56816	MATTHEW NICHOLS	08/07/2025	CONFERENCE - NICOLS 2025 ESRI GIS	678.33
Total MATT NICHOLS:				678.33
METROPOLITAN PLANNING GROUP				
56843	M-GROUP	08/14/2025	JULY-FY 25/26 STAFFING PLANNING, AND GIS MAPPING SERVICES	4,925.00
Total METROPOLITAN PLANNING GROUP:				4,925.00
NAPA AUTO PARTS				
56874	NAPA AUTO PARTS	08/21/2025	VEHICLE PARTS	1.01
Total NAPA AUTO PARTS:				1.01
NICOLAS LASZKIEWICZ				
56817	NICHOLAS TRANSLATIONS & INTERPRETATIONS	08/07/2025	JULY'25 TRANSLATION SERVICE	300.00
Total NICOLAS LASZKIEWICZ:				300.00

NORA FLORES

56904 NORA FLORES	08/28/2025	REFUND DEPOSIT-TRAIN DEPOT 10/25	500.00
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Total NORA FLORES:			500.00
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OMNIPRO LLC

56818 OMNIPRO LLC	08/07/2025	SAMSUNG GALAXY TAB	804.99
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Total OMNIPRO LLC:			804.99
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OPPORTUNITY SPACE INC

56905 OPPORTUNITY SPACE INC	08/28/2025	RENTAL REGISTRY SOFTWARE 2/29/25-6/30/25	8,401.00
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Total OPPORTUNITY SPACE INC:			8,401.00
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PACIFIC GAS & ELECTRIC

56820 PACIFIC GAS & ELECTRIC	08/07/2025	401 SEYMOUR ST	53.30
56820 PACIFIC GAS & ELECTRIC	08/07/2025	401 SEYMOUR ST	124.38
56820 PACIFIC GAS & ELECTRIC	08/07/2025	CITY OF HMB 501 MAIN ST A	8.92
56820 PACIFIC GAS & ELECTRIC	08/07/2025	SHERIFF SUB-STATION	3,121.01
56820 PACIFIC GAS & ELECTRIC	08/07/2025	10 STONE PINE RD - CARTER PARK	86.22
56820 PACIFIC GAS & ELECTRIC	08/07/2025	MAINTENANCE YARD OFFICE - ELECTRIC	174.33
56820 PACIFIC GAS & ELECTRIC	08/07/2025	SMITH FIELD	28.44
56820 PACIFIC GAS & ELECTRIC	08/07/2025	SMITH FIELD SNACK BAR	409.30
56820 PACIFIC GAS & ELECTRIC	08/07/2025	CORREAS EV CHARGERS	1,700.60
56820 PACIFIC GAS & ELECTRIC	08/07/2025	PACIFIC RIDGE LIGHT POLES	36.99
56820 PACIFIC GAS & ELECTRIC	08/07/2025	LIBRARY ELECTRICITY ONLY	27.10
56820 PACIFIC GAS & ELECTRIC	08/07/2025	NW HWY 1 & MAIN ST	131.90
56820 PACIFIC GAS & ELECTRIC	08/07/2025	HWY 1 & MIRAMONTES LIGHTING	42.04
56820 PACIFIC GAS & ELECTRIC	08/07/2025	HWY 1 & MIRAMONTES LIGHTING	98.10
56820 PACIFIC GAS & ELECTRIC	08/07/2025	PELICAN POINT LIFT STATION	266.24
56820 PACIFIC GAS & ELECTRIC	08/07/2025	HWY 1 & MIRAMONTES TRAFFIC SIGNAL	76.11
56820 PACIFIC GAS & ELECTRIC	08/07/2025	OCEAN COLONY PARTNERS/OCP LIFT STATION	1,415.21
56820 PACIFIC GAS & ELECTRIC	08/07/2025	DOWNTOWN ST TREE LIGHTS SOUTH HOOK-UP @ 650 MIRAMONTES	1,138.14
56820 PACIFIC GAS & ELECTRIC	08/07/2025	CITY HALL BUILDING	3,031.86
56820 PACIFIC GAS & ELECTRIC	08/07/2025	CITY OF HMB / STREET LIGHTS	10,152.77
56820 PACIFIC GAS & ELECTRIC	08/07/2025	DOWNTOWN ST TREE LIGHTS NORTH HOOK-UP @ 700 MILL ST	1,396.66
56820 PACIFIC GAS & ELECTRIC	08/07/2025	DUTRA PARK	140.37
56820 PACIFIC GAS & ELECTRIC	08/07/2025	PILARCITOS CREEK UNDERPASS	22.99
56820 PACIFIC GAS & ELECTRIC	08/07/2025	PILARCITOS CREEK BRIDGE	118.52
56820 PACIFIC GAS & ELECTRIC	08/07/2025	MOON SCULPTURE SPOTLIGHTS	18.76
56820 PACIFIC GAS & ELECTRIC	08/07/2025	MOON SCULPTURE SPOTLIGHTS	43.78
56820 PACIFIC GAS & ELECTRIC	08/07/2025	OCEAN VIEW PARK	22.82

56820	PACIFIC GAS & ELECTRIC	08/07/2025	TRAIN DEPOT RSTMS	218.27
56820	PACIFIC GAS & ELECTRIC	08/07/2025	COMMUNITY CENTER	1,740.31
56820	PACIFIC GAS & ELECTRIC	08/07/2025	BELL MOON LIFT STATION	38.71
56820	PACIFIC GAS & ELECTRIC	08/07/2025	HWY 1 & FAIRWAY LIGHTING	45.13
56820	PACIFIC GAS & ELECTRIC	08/07/2025	HWY 1 & FAIRWAY LIGHTING	105.29
56906	PACIFIC GAS & ELECTRIC	08/28/2025	CITY OF HMB / STREET LIGHTS	7,057.34
56906	PACIFIC GAS & ELECTRIC	08/28/2025	401 SEYMOUR ST	53.32
56906	PACIFIC GAS & ELECTRIC	08/28/2025	401 SEYMOUR ST	124.42
56906	PACIFIC GAS & ELECTRIC	08/28/2025	STREETLIGHT PROJECT	71.80
56906	PACIFIC GAS & ELECTRIC	08/28/2025	CITY OF HMB 501 MAIN ST A	8.11
56906	PACIFIC GAS & ELECTRIC	08/28/2025	SHERIFF SUB-STATION	2,719.80
56906	PACIFIC GAS & ELECTRIC	08/28/2025	10 STONE PINE RD - CARTER PARK	96.43
56906	PACIFIC GAS & ELECTRIC	08/28/2025	MAINTENANCE YARD OFFICE - ELECTRIC	135.54
56906	PACIFIC GAS & ELECTRIC	08/28/2025	SMITH FIELD	43.00
56906	PACIFIC GAS & ELECTRIC	08/28/2025	SMITH FIELD SNACK BAR	382.09
56906	PACIFIC GAS & ELECTRIC	08/28/2025	CORREAS EV CHARGERS	1,628.02
56906	PACIFIC GAS & ELECTRIC	08/28/2025	PACIFIC RIDGE LIGHT POLES	40.54
56906	PACIFIC GAS & ELECTRIC	08/28/2025	LIBRARY ELECTRICITY ONLY	24.64
56906	PACIFIC GAS & ELECTRIC	08/28/2025	NW HWY 1 & MAIN ST	142.57
56906	PACIFIC GAS & ELECTRIC	08/28/2025	HWY 1 & MIRAMONTES LIGHTING	39.67
56906	PACIFIC GAS & ELECTRIC	08/28/2025	HWY 1 & MIRAMONTES LIGHTING	92.55
56906	PACIFIC GAS & ELECTRIC	08/28/2025	PELICAN POINT LIFT STATION	248.24
56906	PACIFIC GAS & ELECTRIC	08/28/2025	HWY 1 & MIRAMONTES TRAFFIC SIGNAL	72.96
56906	PACIFIC GAS & ELECTRIC	08/28/2025	OCEAN COLONY PARTNERS/OCP LIFT STATION	1,298.22
56906	PACIFIC GAS & ELECTRIC	08/28/2025	DOWNTOWN ST TREE LIGHTS SOUTH HOOK-UP @ 650 MIRAMONTES	1,074.64
56906	PACIFIC GAS & ELECTRIC	08/28/2025	CITY HALL BUILDING	3,147.86
56906	PACIFIC GAS & ELECTRIC	08/28/2025	DOWNTOWN ST TREE LIGHTS NORTH HOOK-UP @ 700 MILL ST	1,458.58
56906	PACIFIC GAS & ELECTRIC	08/28/2025	DUTRA PARK	133.05
56906	PACIFIC GAS & ELECTRIC	08/28/2025	PILARCITOS CREEK UNDERPASS	23.47
56906	PACIFIC GAS & ELECTRIC	08/28/2025	PILARCITOS CREEK BRIDGE	126.70
56906	PACIFIC GAS & ELECTRIC	08/28/2025	MOON SCULPTURE SPOTLIGHTS	19.67
56906	PACIFIC GAS & ELECTRIC	08/28/2025	MOON SCULPTURE SPOTLIGHTS	45.90
56906	PACIFIC GAS & ELECTRIC	08/28/2025	OCEAN VIEW PARK	24.73
56906	PACIFIC GAS & ELECTRIC	08/28/2025	TRAIN DEPOT RSTMS	181.99
56906	PACIFIC GAS & ELECTRIC	08/28/2025	COMMUNITY CENTER	1,523.76
56906	PACIFIC GAS & ELECTRIC	08/28/2025	BELL MOON LIFT STATION	38.45
56906	PACIFIC GAS & ELECTRIC	08/28/2025	HWY 1 & FAIRWAY LIGHTING	40.36
56906	PACIFIC GAS & ELECTRIC	08/28/2025	HWY 1 & FAIRWAY LIGHTING	94.17

Total PACIFIC GAS & ELECTRIC: 48,247.16

PHILS TIRE & AUTO CARE INC

56821	PHILS TIRE & AUTO CARE INC	08/07/2025	FORD F-350 VEHICLE SERVICE	1,384.15
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56875	PHILS TIRE & AUTO CARE INC	08/21/2025	FORD F-350 VEHICLE SERVICE	60.00
Total PHILS TIRE & AUTO CARE INC:				1,444.15
PUBLIC PARKING ASSOCIATES INC				
56844	PUBLIC PARKING ASSOCIATES INC	08/14/2025	MAINTENANCE SERVICE	527.00
Total PUBLIC PARKING ASSOCIATES INC:				527.00
QUADIENT FINANCE USA, INC				
56876	QUADIENT FINANCE USA, INC	08/21/2025	FY 25/26 QUADIENT LEASE & POSTAGE	302.03
Total QUADIENT FINANCE USA, INC:				302.03
R.C. SHAY & CO. INC.				
56877	R.C. SHAY & CO. INC.	08/21/2025	RED CURB PAINTING	5,500.00
Total R.C. SHAY & CO. INC.:				5,500.00
REGENTS OF THE UNIVERSITY OF CALIFORNIA				
56878	REGENTS OF THE UNIVERSITY OF CALIFORNIA	08/21/2025	CA MUNICIPAL LAW HANDBOOK	671.10
Total REGENTS OF THE UNIVERSITY OF CALIFORNIA:				671.10
RENTOKIL NORTH AMERICA INC				
56851	WESTERN EXTERMINATOR COMPANY	08/14/2025	FY 25/26 EXTERMINATOR SERVICES-JULY	1,851.97
Total RENTOKIL NORTH AMERICA INC:				1,851.97
RICE TRUCKING-SOIL FARM LLC				
56822	RICE TRUCKING-SOIL FARM INC.	08/07/2025	MAINTENANCE SUPPLIES	210.96
Total RICE TRUCKING-SOIL FARM LLC:				210.96
RINCON CONSULTANTS INC.				
56845	RINCON CONSULTANTS INC.	08/14/2025	JULY-HOUSING ELEMENT CEQA	4,719.25
Total RINCON CONSULTANTS INC.:				4,719.25
ROBERT HALF				
56879	ROBERT HALF	08/21/2025	COLLETT, DIANNA 8/15/25	649.92
56907	ROBERT HALF	08/28/2025	COLLETT, DIANNA 8/22/25	588.99
56907	ROBERT HALF	08/28/2025	COLLETT, DIANNA 8/22/25	588.99

Total ROBERT HALF:			1,827.90	
ROSIBEL ACOSTA				
56823	ROSIBEL ACOSTA	08/07/2025	REFUND DEPOSIT- OAK ROOM 8/2/25	500.00
56823	ROSIBEL ACOSTA	08/07/2025	DEDUCTION FOR 4 BOTTLES OF TEQUILA	100.00-
Total ROSIBEL ACOSTA:			400.00	
SAN MATEO CO. PLANNING AND BUILDING DIV				
56908	SAN MATEO CO. PLANNING AND BUILDING DIV	08/28/2025	FY25/26 AIRPORT ROUNDTABLE MEMBERSHIP FEE	1,500.00
Total SAN MATEO CO. PLANNING AND BUILDING DIV:			1,500.00	
SCHAPER HEATING AND COOLING				
56910	SCHAPER HEATING AND COOLING	08/28/2025	HVAC WORK AT TED ADCOCK COMMUNITY CENTER, INCLUDING REMOVAL OF GAS FURNACES, INSTAL	44,552.80
Total SCHAPER HEATING AND COOLING:			44,552.80	
SEWER AUTHORITY MID-COASTSIDE				
56824	SEWER AUTHORITY MID-COASTSIDE	08/07/2025	MAY 2025 PASS THROUGH INVOICES	1,480.00
56824	SEWER AUTHORITY MID-COASTSIDE	08/07/2025	GENERAL OPERATIONS AND MAINTENANCE BUDGET FOR FY 25/26 (\$5,989,200), PLUS AN ADDITIONA	499,100.00
56824	SEWER AUTHORITY MID-COASTSIDE	08/07/2025	JULY-SEWER COLLECTION SYSTEM CLEANING, MAINTENANCE, AND RELATED SERVICES FY 25/26	19,472.08
56880	SEWER AUTHORITY MID-COASTSIDE	08/21/2025	JULY 2025 PASS THROUGH INVOICES	5,160.00
56880	SEWER AUTHORITY MID-COASTSIDE	08/21/2025	GENERAL OPERATIONS AND MAINTENANCE BUDGET FOR FY 25/26 (\$5,989,200), PLUS AN ADDITIONA	499,100.00
56880	SEWER AUTHORITY MID-COASTSIDE	08/21/2025	SEWER COLLECTION SYSTEM CLEANING, MAINTENANCE, AND RELATED SERVICES FY 25/26	19,472.08
Total SEWER AUTHORITY MID-COASTSIDE:			1,043,784.16	
SHARP ELECTRONICS CORPORATION				
56881	SHARP ELECTRONICS CORPORATION	08/21/2025	PRINTER LEASE- 48 MONTHS	791.73
56882	SHARP ELECTRONICS CORPORATION	08/21/2025	PRINTER LEASE- 48 MONTHS	1,511.56
Total SHARP ELECTRONICS CORPORATION:			2,303.29	
SHERI SAISI				
56883	SHERI SAISI	08/21/2025	REIMBURSEMENT-TRAVEL-NATIONAL NOTARY EXAM	49.25
Total SHERI SAISI:			49.25	
SHUTE MIHALY & WEINBERGER LLP				
56825	SHUTE MIHALY & WEINBERGER LLP	08/07/2025	LEGAL SERVICES	110,953.22

Total SHUTE MIHALY & WEINBERGER LLP:		110,953.22
SILVIA AMEZCUA	08/07/2025 REFUND-DEPOSIT TRAIN DEPOT 7/26/25	<u>500.00</u>
56826 SILVIA AMEZCUA		
Total SILVIA AMEZCUA:		<u>500.00</u>
STAR ELEVATOR INC	08/21/2025 AUG ELEVATOR MAINTENANCE	<u>260.00</u>
56884 STAR ELEVATOR INC		
Total STAR ELEVATOR INC:		<u>260.00</u>
STARCREEK LAND STEWARDS INC.	08/21/2025 GOAT GRAZING/VEGITATION MANAGEMENT FY 25/26	<u>29,950.00</u>
56885 STARCREEK LAND STEWARDS INC.		
Total STARCREEK LAND STEWARDS INC.:		<u>29,950.00</u>
STERICYCLE SPECIALTY WASTE SOLUTIONS INC	08/14/2025 PAPER SHREDDING	<u>220.43</u>
56847 STERICYCLE, INC.		
Total STERICYCLE SPECIALTY WASTE SOLUTIONS INC:		<u>220.43</u>
STRAIGHT WHEEL CYCLING LLC		
56886 STRAIGHT WHEEL CYCLING LLC	08/21/2025 PEDAL FOR A PURPOSE - #112	8,364.00
56886 STRAIGHT WHEEL CYCLING LLC	08/21/2025 PEDAL FOR A PURPOSE - #3888	70.87
56886 STRAIGHT WHEEL CYCLING LLC	08/21/2025 PEDAL FOR A PURPOSE - #3890	649.52
Total STRAIGHT WHEEL CYCLING LLC:		<u>9,084.39</u>
SUBURBAN PROPANE LP		
56827 SUBURBAN PROPANE LP	08/07/2025 PROPANE ACCT 1601-064098	<u>1,029.95</u>
Total SUBURBAN PROPANE LP:		<u>1,029.95</u>

SWCA INCORPORATED

56828	SWCA INCORPORATED	08/07/2025	2025 GOAT GRAZING PROJECT (VEGETATION MANAGEMENT)	6,344.00
56887	SWCA INCORPORATED	08/21/2025	FINAL-CARTER PARK IMPROVEMENTS PROJECT-BIOLOGICAL COMPLIANCE SUPPORT	3,981.75
56911	SWCA INCORPORATED	08/28/2025	JULY 2025 GOAT GRAZING PROJECT (VEGETATION MANAGEMENT)	909.50
56911	SWCA INCORPORATED	08/28/2025	JULY 2025-PILARCITOS CREEK - FENCING ENVIRONMENTAL SERVICES	1,055.75
56911	SWCA INCORPORATED	08/28/2025	JULY 2025-SMITH FIELD & WAVECREST PROJECTS	1,181.75

Total SWCA INCORPORATED:

13,472.75

THE CITIES GROUP

56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	74.10
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	26.03
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	26.54
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	65.81
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	23.54
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	7.31
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	15.16
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	38.08
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	42.35
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	95.05
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	41.80
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	51.30
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	67.07
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	11.33
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	34.33
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	8.50
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	6.11
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	.95
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	4.83
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	28.32
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	9.41
56912	THE CITIES GROUP	08/28/2025	Workers' Comp 7/1/25-12/31/25	14.61
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	237.67
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	83.50
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	85.14
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	211.08
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	75.50
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	23.45
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	48.61
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	122.13
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	135.82
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	304.85
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	134.06

56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	164.54
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	215.11
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	36.34
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	110.10
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	27.26
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	19.59
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	15.48
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	90.84
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	30.17
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	46.87
56912	THE CITIES GROUP	08/28/2025	Safety Compliance 7/1-12/31/25	3.03
Total THE CITIES GROUP:				2,913.67
THE HOME DEPOT PRO				
56836	HD SUPPLY FORMERLY HOME DEPOT PRO	08/14/2025	MAINTENANCE SUPPLIES	829.78
Total THE HOME DEPOT PRO:				829.78
TIMOTHY CONLON				
56913	TIMOTHY CONLON	08/28/2025	SHERIFF'S SUBSTATION VEHICLE GATE REPLACEMENT: REMOVE EXISTING GATE; FABRICATE NEW GATE	19,950.00
Total TIMOTHY CONLON:				19,950.00
T-MOBILE USA INC.				
56888	T-MOBILE	08/21/2025	ACCT 997385192 JULY '25	94.05
Total T-MOBILE USA INC.:				94.05
TURBO DATA SYSTEMS INC				
56848	TURBO DATA SYSTEMS	08/14/2025	CITATION PROCESSING	1,053.74
Total TURBO DATA SYSTEMS INC:				1,053.74
V. W. HOUSEN & ASSOCIATES INC.				
56914	V. W. HOUSEN & ASSOCIATES INC.	08/28/2025	JAN-FEB '25 WASTEWATER COLLECTION	11,036.00
Total V. W. HOUSEN & ASSOCIATES INC.:				11,036.00
VESTIS GROUP INC				
56829	VESTIS	08/07/2025	MATS - CITY HALL	198.99
56829	VESTIS	08/07/2025	MATS - PUBLIC LIBRARY	127.53
56829	VESTIS	08/07/2025	MATS - CITY HALL	198.99

56829	VESTIS	08/07/2025	MATS - PUBLIC LIBRARY	127.53
56849	VESTIS	08/14/2025	MATS - CITY HALL	198.99
56849	VESTIS	08/14/2025	MATS - PUBLIC LIBRARY	127.53
56889	VESTIS	08/21/2025	MATS - CITY HALL	198.99
56889	VESTIS	08/21/2025	MATS - PUBLIC LIBRARY	127.53
56889	VESTIS	08/21/2025	MATS - CITY HALL	198.99
56889	VESTIS	08/21/2025	MATS - PUBLIC LIBRARY	127.53
Total VESTIS GROUP INC:				1,632.60
VICTOR HERNANDEZ				
56819	ON POINT LANGUAGE SOLUTIONS LLC	08/07/2025	JULY'25 TRANSLATION SERVICES	2,961.25
Total VICTOR HERNANDEZ:				2,961.25
WATERWAYS CONSULTING INC				
56850	WATERWAYS CONSULTING INC	08/14/2025	24/25 STATE PARKS CULVERT PEER REVIEW PDP-21-071	475.00
56850	WATERWAYS CONSULTING INC	08/14/2025	24/25 STATE PARKS CULVERT PEER REVIEW PDP-21-071	475.00
56850	WATERWAYS CONSULTING INC	08/14/2025	24/25 STATE PARKS CULVERT PEER REVIEW PDP-21-071	475.00
Total WATERWAYS CONSULTING INC:				475.00
WELLS FARGO				
56915	WELLS FARGO	08/04/2025	CITY HALL INTERNET	356.82
56915	WELLS FARGO	08/04/2025	OFFICE SUPPLY	59.92
56915	WELLS FARGO	08/04/2025	WELCOME BREAKFAST-COFFEE	42.30
56915	WELLS FARGO	08/04/2025	OFFICE SUPPLY	97.03
56915	WELLS FARGO	08/04/2025	WELCOME BREAKFAST-FOOD	52.53
56915	WELLS FARGO	08/04/2025	EOC-INTERNET	65.00
56915	WELLS FARGO	08/04/2025	PARMA MEMBERSHIP-ROSSI	300.00
56915	WELLS FARGO	08/04/2025	STONE PINE-INTERNET	293.27
56915	WELLS FARGO	08/04/2025	TACC-INTERNET	226.23
56915	WELLS FARGO	08/04/2025	OFFICE SUPPLY	15.34
56915	WELLS FARGO	08/04/2025	OFFICE SUPPLY	30.79
56915	WELLS FARGO	08/04/2025	TRAVEL FOR TRAINING-EASTMAN	353.47
56915	WELLS FARGO	08/04/2025	TRAVEL FOR TRAINING-FRINK	353.47
56915	WELLS FARGO	08/04/2025	TRAINING	159.98
56915	WELLS FARGO	08/04/2025	CSMFO-BUDGET APPLICATION FEE	150.00
56915	WELLS FARGO	08/04/2025	IT/DOMAIN TRANSFERS	179.64
56915	WELLS FARGO	08/04/2025	FARRIS FAREWELL FOOD	15.00
56915	WELLS FARGO	08/04/2025	CORP YARD CREAMER	38.99
56915	WELLS FARGO	08/04/2025	CORP YARD TEA	26.99
56915	WELLS FARGO	08/04/2025	COMPRESSED GAS	18.99

56915	WELLS FARGO	08/04/2025	CORP YARD DRILL	136.24
56915	WELLS FARGO	08/04/2025	WELCOME BREAKFAST FOOD	338.83
56915	WELLS FARGO	08/04/2025	MOUSE & MOUSEPAD	59.29
56915	WELLS FARGO	08/04/2025	CORP YARD OFFICE SUPPLIES	52.48
56915	WELLS FARGO	08/04/2025	PRIDE EVENT FOOD	90.00
56915	WELLS FARGO	08/04/2025	NET GRADUATION FOOD	163.00
56915	WELLS FARGO	08/04/2025	COUNCIL MEETING SNACKS	81.29
56915	WELLS FARGO	08/04/2025	ZOOM-SUBSCRIPTION FOR COUNCIL MEETINGS	343.92
56915	WELLS FARGO	08/04/2025	COAT RACKS	16.47
56915	WELLS FARGO	08/04/2025	DESK FOR CITY HALL	263.69
56915	WELLS FARGO	08/04/2025	TRACTOR COOLANT	80.16
56915	WELLS FARGO	08/04/2025	SCARIFIER FOR STRIPING & CURBS	7,569.89
56915	WELLS FARGO	08/04/2025	QAC REGISTRATION-PEREZ, CAMACHO, & PINCE	960.00
56915	WELLS FARGO	08/04/2025	KEYBOARD	25.26
56915	WELLS FARGO	08/04/2025	OFFICE CHAIRS	142.83
56915	WELLS FARGO	08/04/2025	REAR VIEW MIRROR FOR BACKHOE	251.28
56915	WELLS FARGO	08/04/2025	MAINTENANCE UNIFORMS	263.61
56915	WELLS FARGO	08/04/2025	PLANTS	341.58
56915	WELLS FARGO	08/04/2025	MAINTENANCE UNIFORMS	821.89
56915	WELLS FARGO	08/04/2025	MAINTENANCE UNIFORMS	676.02
56915	WELLS FARGO	08/04/2025	MAINTENANCE HATS	1,607.81
56915	WELLS FARGO	08/04/2025	SAT. PHONE CHARGER	9.38
56915	WELLS FARGO	08/04/2025	SIGN HARDWARE	499.39
56915	WELLS FARGO	08/04/2025	BARRICADE RENTAL-4TH OF JULY	1,149.75
56915	WELLS FARGO	08/04/2025	MAINTENANCE SHIRTS	322.55
56915	WELLS FARGO	08/04/2025	FILE CABINET	103.43
56915	WELLS FARGO	08/04/2025	MAINTENANCE UNIFORMS	172.79
56915	WELLS FARGO	08/04/2025	WALL CALENDAR	8.78
56915	WELLS FARGO	08/04/2025	DOG WASTE BAGS	1,317.96
56915	WELLS FARGO	08/04/2025	IRRIGATION SERVICE	851.85
56915	WELLS FARGO	08/04/2025	CARWASH-4TH OF JULY	9.00
56915	WELLS FARGO	08/04/2025	LANDSCAPE SHEETS	37.35
56915	WELLS FARGO	08/04/2025	TRASH PICKERS	98.85
56915	WELLS FARGO	08/04/2025	GATEWAY GRAPHICS	30.00
56915	WELLS FARGO	08/04/2025	CALED CONFERENCE-DECKER	75.00
56915	WELLS FARGO	08/04/2025	CALED CONFERENCE-DECKER	174.90
56915	WELLS FARGO	08/04/2025	OCC UTILITIES	602.49
56915	WELLS FARGO	08/04/2025	CSFA COHORT TRAINING-FOOD	129.70
56915	WELLS FARGO	08/04/2025	COMMUNICATIONS	175.00
56915	WELLS FARGO	08/04/2025	COMMUNICATIONS	27.86
56915	WELLS FARGO	08/04/2025	PLANNING POSTING SUPPLIES	56.00
56915	WELLS FARGO	08/04/2025	ZOOM SUBSCRIPTION	95.97
56915	WELLS FARGO	08/04/2025	OFFICE SUPPLIES	153.77

56915	WELLS FARGO	08/04/2025	NEWSPAPER SUBSCRIPTION	.99
56915	WELLS FARGO	08/04/2025	NEWSPAPER SUBSCRIPTION	99.00
56915	WELLS FARGO	08/04/2025	OCC SUPPLIES	16.46
56915	WELLS FARGO	08/04/2025	OCC SUPPLIES	38.23
56915	WELLS FARGO	08/04/2025	OCC SUPPLIES	26.81
56915	WELLS FARGO	08/04/2025	OCC WATER SUPPLY	109.65
56915	WELLS FARGO	08/04/2025	PG&E MEETING-COFFEE	16.48
56915	WELLS FARGO	08/04/2025	PG&E MEETING-SNACKS	30.47
56915	WELLS FARGO	08/04/2025	OCC SUPPLY-WATER	125.03
56915	WELLS FARGO	08/04/2025	GIS COFERENCE TRAVEL - MAZ	196.60
56915	WELLS FARGO	08/04/2025	GIS CONFERENCE TRAVEL - MAZ	216.60
56915	WELLS FARGO	08/04/2025	CAD SUBSCRIPTION 1 MONTH	520.00
56915	WELLS FARGO	08/04/2025	RECONCILING ITEMS-CREDITS NEXT STATEMENT	876.91-
56915	WELLS FARGO	08/04/2025	SUPPLIES	109.86
56915	WELLS FARGO	08/04/2025	SUPPLIES	593.00
56915	WELLS FARGO	08/04/2025	SUPPLIES	175.79
56915	WELLS FARGO	08/04/2025	SUPPLIES	252.70
56915	WELLS FARGO	08/04/2025	AMAZON MEMBERSHIP	16.47
56915	WELLS FARGO	08/04/2025	SUPPLIES	1,345.97
56915	WELLS FARGO	08/04/2025	PRINTING SUPPLIES	91.15
56915	WELLS FARGO	08/04/2025	PLAYPASS MEMBERSHIP	19.00
56915	WELLS FARGO	08/04/2025	SUPPLIES	7.92
56915	WELLS FARGO	08/04/2025	SUPPLIES	131.83
56915	WELLS FARGO	08/04/2025	SUPPLIES	131.83
56915	WELLS FARGO	08/04/2025	SUPPLIES	34.70
56915	WELLS FARGO	08/04/2025	SUPPLIES	153.81
56915	WELLS FARGO	08/04/2025	SUPPLIES	194.16
56915	WELLS FARGO	08/04/2025	SUMMER'S END PRINTING	341.39
56915	WELLS FARGO	08/04/2025	SUPPLIES	175.72
56915	WELLS FARGO	08/04/2025	SUPPLIES	38.40
56915	WELLS FARGO	08/04/2025	SUPPLIES	30.75
56915	WELLS FARGO	08/04/2025	CANVA ADVERTISING	119.99
56915	WELLS FARGO	08/04/2025	SUPPLIES	18.34
56915	WELLS FARGO	08/04/2025	SUPPLIES	173.68
56915	WELLS FARGO	08/04/2025	FACEBOOK ADVERTISING	29.95
56915	WELLS FARGO	08/04/2025	SUPPLIES	257.06
56915	WELLS FARGO	08/04/2025	SUPPLIES	15.34
56915	WELLS FARGO	08/04/2025	SPOTIFY MEMBERSHIP	11.99
56915	WELLS FARGO	08/04/2025	EZ FACILITY MEMBERSHIP	513.00

Total WELLS FARGO:

28,726.28

WOOD CONSULTING SERVICES

56852	WOOD CONSULTING SERVICES	08/14/2025	JULY-OCC SUSTAINABILITY AND BUSINESS RESOURCE SUPPORT	4,987.50
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Total WOOD CONSULTING SERVICES:				4,987.50
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ZONES IT SOLUTIONS INC.

56830	ZONES, LLC	08/07/2025	FY 25/26 ZONES MICROSOFT 365 LICENSING	2,650.25
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56890	ZONES, LLC	08/21/2025	CIVIL 3D GOV NEW SINGLE-USER ELD ANNUAL SUBSCRIPTION	5,740.00
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56890	ZONES, LLC	08/21/2025	FY 25/26 ZONES MICROSOFT 365 LICENSING 8-12-25 to 9-12-25	1,592.28
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Total ZONES IT SOLUTIONS INC.:				9,982.53
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Grand Totals:				1,880,241.57
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Report Criteria:

Report type: GL detail

BUSINESS OF THE COUNCIL OF THE CITY OF HALF MOON BAY

AGENDA REPORT

For meeting of: **September 16, 2025**

TO: Honorable Mayor and City Council

VIA: Matthew Chidester, City Manager

FROM: Lisa Rossi, Administrative Services Director
Kenneth Stiles, Finance Manager

TITLE: **FINANCIAL REPORT FOR THE QUARTER ENDED ON JUNE 30, 2025**

RECOMMENDATION:

Accept the Financial Report for the quarter ended on June 30, 2025.

FISCAL IMPACT:

There is no fiscal impact with the acceptance of this report.

STRATEGIC ELEMENT:

This recommendation supports the *Fiscal Sustainability* and *Inclusive Governance* Elements of the Strategic Plan.

BACKGROUND:

One of the City Council strategic priorities includes planning for and implementing long-term financial stability. A key component of this goal includes preparing a quarterly financial report that would provide readers with an executive summary of the City's current financial conditions as it relates to the annual operating budget to ensure accountability and transparency in managing public funds.

DISCUSSION:

As of June 30, 2025, General Fund revenues totaled \$23.5 million or 112% of the approved budget for FY 2024-25. General Fund expenditures totaled \$24.2 million or 94% of budget. As outlined in the attached report, revenues are projected to exceed budget by \$2.6 million, driven primarily by stronger-than-expected Transient Occupancy Tax and Sales Tax performance. Expenditures are projected to come in \$1.4 million under budget, largely due to salary savings from vacant positions and less spending overall.

The City anticipates additional unassigned funds at the conclusion of the audit and delivery of the Annual Comprehensive Financial Report in December. With the information available, staff

holds no great concern for financial stability for the current fiscal year; however longer-term fiscal challenges persist.

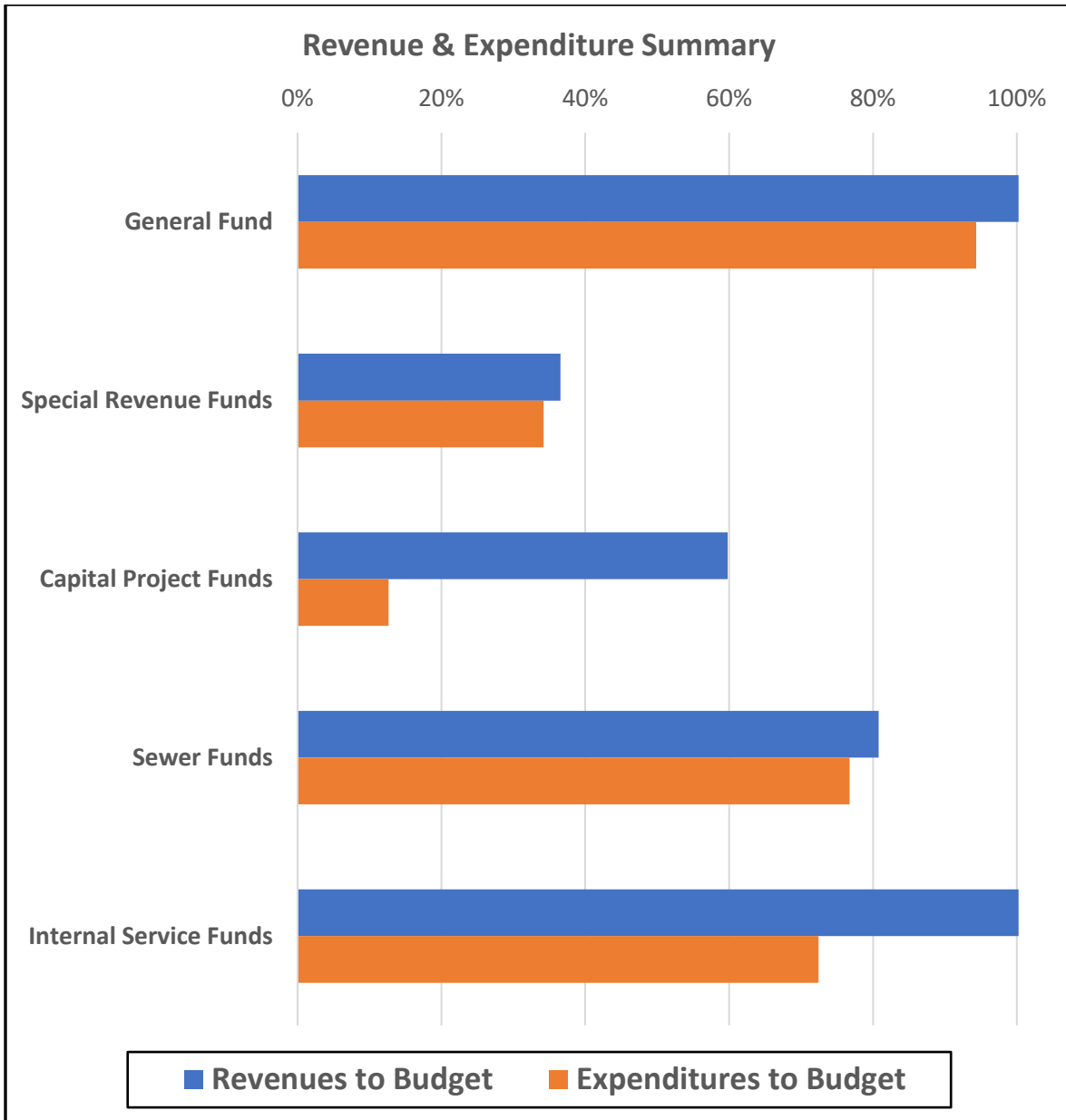
ATTACHMENT:

Financial Report for the quarter ended on June 30, 2025

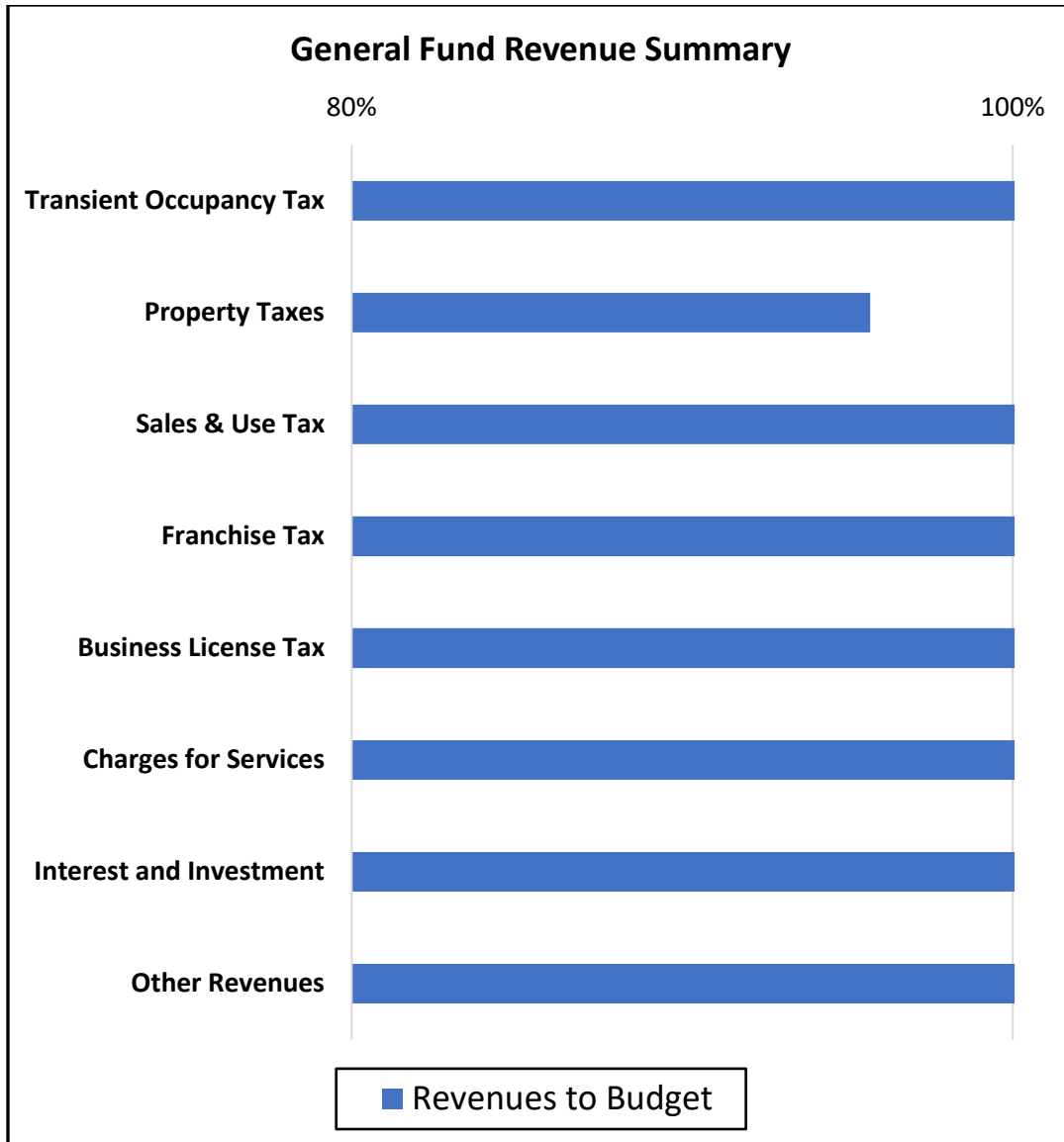
CITY OF HALF MOON BAY
Quarterly Financial Report
June 30, 2025



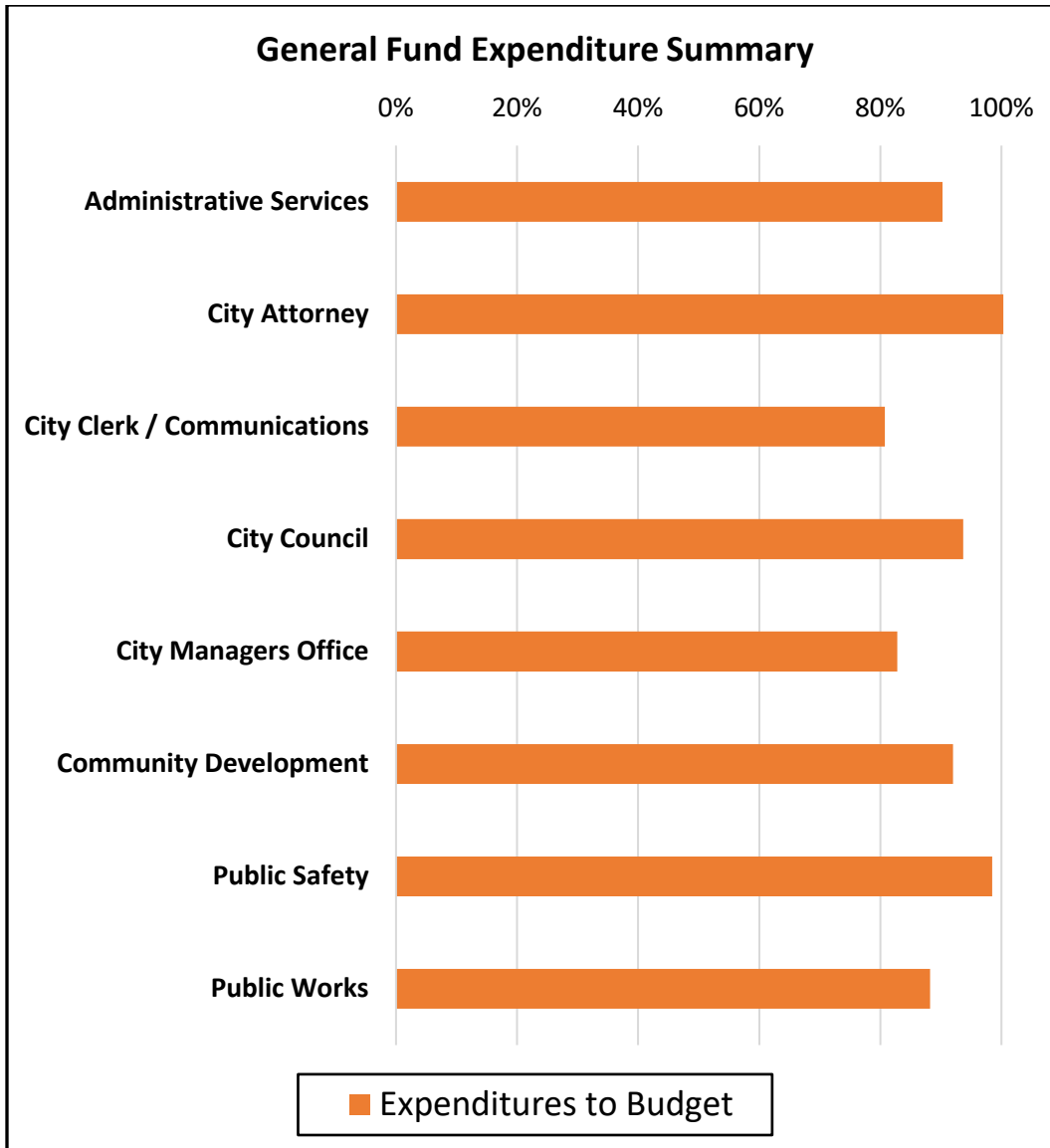
Prepared By:
Administrative Services Department



Funds	Revenues		Expenditures	
	Actual	% of Budget	Actual	% of Budget
General Fund	23,505,000	112%	24,263,601	94%
Special Revenue Funds	8,082,161	37%	8,421,800	34%
Capital Project Funds	2,345,748	60%	674,709	13%
Sewer Funds	7,589,649	81%	5,983,047	77%
Internal Service Funds	1,713,394	106%	1,267,613	72%
Pension Stabilization Fund	1,404,893	100%	1,346,432	100%
TOTAL FOR ALL FUNDS	44,640,845	75%	41,957,203	67.5%



Department	Budget	Actual	% of Budget	Variance Over / (Under)	Variance % Delta
Transient Occupancy Tax	8,343,730	9,616,592	115%	1,272,862	15%
Property Taxes	3,926,861	3,757,360	96%	(169,501)	-4%
Sales & Use Tax	2,948,414	3,634,164	123%	685,750	23%
Franchise Tax	997,341	1,032,642	104%	35,301	4%
Business License Tax	353,700	408,035	115%	54,335	15%
Charges for Services	1,990,297	2,421,671	122%	431,374	22%
Interest and Investment	480,000	706,358	147%	226,358	47%
Other Revenues	1,268,972	1,340,419	106%	71,447	6%
Transfers in	587,760	587,760	100%	-	0%
TOTAL	20,897,074	23,505,000	112%	2,607,925	12%



Department	Budget	Actual	% of Budget	Variance Over / (Under)	Variance % Delta
Administrative Services	1,377,531	1,243,492	90%	(134,038)	-10%
City Attorney	1,120,223	1,317,015	118%	196,792	18%
City Clerk / Communications	1,077,063	869,870	81%	(207,193)	-19%
City Council	228,642	214,195	94%	(14,447)	-6%
City Managers Office	3,408,624	2,822,865	83%	(585,759)	-17%
Community Development	2,239,039	2,059,998	92%	(179,040)	-8%
Public Safety	7,237,728	7,127,366	98%	(110,362)	-2%
Public Works	3,709,130	3,272,661	88%	(436,469)	-12%
Non Departmental / Debt Service	945,778	963,815	102%	18,037	2%
Transfers	4,372,323	4,372,323	100%	-	0%
TOTAL	25,716,079	24,263,601	94%	(1,452,478)	-6%

GENERAL FUND ANALYSIS:

The General Fund is the primary operating fund of the City and is used to account for most operating activities. Table 1 below provides year-to-date through the fourth quarter comparable data for the current fiscal year and the prior year.

Table 1: Fourth Quarter Budget to Actual Comparison						
	FY 2024-25			FY 2023-24		
	Revised Budget	Actuals as of 06/30/2025	% of Budget	Final Actuals	Actuals as of 06/30/2024	% of Actuals
Revenues						
Transient Occupancy Tax	8,343,730	9,616,592	115%	8,167,938	8,167,938	100%
Property Taxes	3,926,861	3,757,360	96%	4,283,590	4,283,590	100%
Sales & Use Tax	2,948,414	3,634,164	123%	3,111,521	3,111,521	100%
Franchise Tax	997,341	1,032,642	104%	992,685	992,685	100%
Business License Tax	353,700	408,035	115%	350,948	350,948	100%
Charges for Services	1,990,297	2,421,671	122%	2,107,946	2,107,946	100%
Interest and Investment	480,000	706,358	147%	804,185	804,185	100%
Other Revenues	1,268,972	1,340,419	106%	4,048,551	4,048,551	100%
Transfers in	587,760	587,760	100%	537,285	537,285	100%
Total Revenues	20,897,074	23,505,000	112%	24,404,648	24,404,648	100%
Expenditures						
Administrative Services	1,377,531	1,243,492	90%	1,256,621	1,256,621	100%
City Attorney	1,120,223	1,317,015	118%	1,336,296	1,336,296	100%
City Clerk / Communications	1,077,063	869,870	81%	922,299	922,299	100%
City Council	228,642	214,195	94%	179,922	179,922	100%
City Managers Office	3,408,624	2,822,865	83%	3,330,577	3,330,577	100%
Community Development	2,239,039	2,059,998	92%	1,797,587	1,797,587	100%
Public Safety	7,237,728	7,127,366	98%	6,242,696	6,242,696	100%
Public Works	3,709,130	3,272,661	88%	3,256,555	3,256,555	100%
Non Departmental / Debt Service	945,778	963,815	102%	3,730,332	3,730,332	100%
Operating Transfers	2,259,619	2,259,619	100%	1,753,738	1,753,738	100%
Capital Transfers	2,112,704	2,112,704	100%	2,458,000	2,458,000	100%
Total Expenditures	25,716,079	24,263,601	94%	26,264,623	26,264,623	100%

For fiscal year 2024-25, the City generated \$23.5 million in revenues, exceeding budgetary expectations, primarily due to TOT and sales tax revenue.

Expenditures for the year total \$24.2 million. At 94% of budget, the City has ended the year under budget primarily due to salary savings and less spending overall.

Revenues

Table 2 below shows a year-to-date summary of actual revenues through the fourth quarter for fiscal year 2024-25 and estimated final over/under performance of revenues

Table 2: Fourth Quarter Revenues					
	FY 2024-25			Variance	
	Revised Budget	Actuals as of 06/30/2025	% of Budget	Over / (Under)	% Delta
Revenues					
Transient Occupancy Tax	8,343,730	9,616,592	115%	1,272,862	15%
Property Taxes	3,926,861	3,757,360	96%	(169,501)	-4%
Sales & Use Tax	2,948,414	3,634,164	123%	685,750	23%
Franchise Tax	997,341	1,032,642	104%	35,301	4%
Business License Tax	353,700	408,035	115%	54,335	15%
Charges for Services	1,990,297	2,421,671	122%	431,374	22%
Interest and Investment	480,000	706,358	147%	226,358	47%
Other Revenues	1,268,972	1,340,419	106%	71,447	6%
Transfers in	587,760	587,760	100%	-	0%
Total Revenues	20,897,074	23,505,000	112%	2,607,925	12%

- Transient Occupancy Tax (TOT):** The City received \$9.6 million through the fourth quarter, exceeding the budget by \$1.2 million. This strong performance reflects monthly collections consistently outpacing prior-year levels since December. Sustained growth in TOT revenues will be an important factor in helping the City address its structural deficit.
- Property Taxes:** The City has received \$3.7 million to date which is a budget shortfall of about \$169 thousand. This shortfall is primarily due to timing differences in vehicle-in-lieu fees, which the City received in August. It should be noted that the State and the Cities of San Mateo County are currently engaged in a dispute regarding VLF allocations. Staff will continue to forecast conservatively and monitor the issue closely given its long-term implications.
- Sales & Use Taxes:** The City collected \$3.6 million in sales and use tax revenues through the fourth quarter, exceeding the budget by \$685 thousand. This positive variance reflects both the underlying growth in the sales tax base and new receipts from Measure R, the voter-approved sales tax increase that took effect on April 1, 2025. Of the total received, \$374 thousand came from Measure R. Although the measure contributed revenues for only one quarter of the fiscal year, its initial performance highlights its potential to serve as a stable, long-term revenue source for the City.

Expenditures

Table 3 below shows a summary of fourth quarter budget-to-actual revenues for FY 2024-25 and final over/under performance of expenditures.

Table 3: Fourth Quarter Expenditures					
	FY 2024-25			Variance	
	Revised Budget	Actuals as of 06/30/2025	% of Budget	Over / (Under)	% Delta
Expenditures					
Administrative Services	1,377,531	1,243,492	90%	(134,038)	-10%
City Attorney	1,120,223	1,317,015	118%	196,792	18%
City Clerk / Communications	1,077,063	869,870	81%	(207,193)	-19%
City Council	228,642	214,195	94%	(14,447)	-6%
City Managers Office	3,408,624	2,822,865	83%	(585,759)	-17%
Community Development	2,239,039	2,059,998	92%	(179,040)	-8%
Public Safety	7,237,728	7,127,366	98%	(110,362)	-2%
Public Works	3,709,130	3,272,661	88%	(436,469)	-12%
Non Departmental / Debt Service	945,778	963,815	102%	18,037	2%
Operating Transfers	2,259,619	2,259,619	100%	-	0%
Capital Transfers	2,112,704	2,112,704	100%	-	0%
Total Expenditures	25,716,079	24,263,601	94%	(1,452,478)	-6%

General Fund expenditures through the fourth quarter totaled \$23.8 million, or 93% of budget. To address the ongoing structural deficit, the City implemented cost-containment measures aimed at minimizing service impacts. These included holding certain staff vacancies open and closely monitoring departmental budgets.

As a result, total General Fund expenditures are projected to finish about \$1.4 million under budget, with the savings returned to the unassigned fund balance.

Budget Adjustments

Table 4 below shows a summary of council actions with potential budgetary effects during the third quarter not reflected in the numbers above.

Table 4: Budget Adjustments			
Item	Major Funding Source	Total Fiscal Impact	GF Impact
<i>No budgetary adjustments during this quarter</i>			\$ -
Total		\$ -	\$ -

Conclusion

Table 5 below shows an updated summary of general fund balances for the fiscal year.

Table 5: General Fund Balance Summary			
	FY 2024-25	FY 2024-25	FY 2025-26
	Budget	Est. Final Actuals*	Budget
Beginning Fund Balance	14,367,930	14,367,930	13,609,329
Revenues	20,897,074	23,505,000	23,858,488
Expenditures	<u>(25,716,079)</u>	<u>(24,263,601)</u>	<u>(25,329,607)</u>
Annual Surplus / (Deficit)	(4,819,005)	(758,601)	(1,471,119)
Ending Fund Balance	9,548,925	13,609,329	12,138,210
General Fund Reserve	(7,017,113)	(7,017,113)	(7,303,382)
Economic Uncertainty	<u>(1,634,636)</u>	<u>(1,634,636)</u>	<u>(1,530,399)</u>
Unassigned	897,176	4,957,580	3,304,429

**Numbers are unaudited. Final audited numbers are presented with the delivery of the Annual Comprehensive Financial report in December*

Due to revenues exceeding expectations and expenditures ending significantly under budget, the City anticipates an estimated \$4.9 million in unassigned fund balance as of June 30, 2025. A portion of these funds has already been designated to help balance the Fiscal Year 2025-26 budget deficit. With this use, the City projects \$3.3 million in unassigned funds remaining as of June 30, 2026.

Given the ongoing structural deficit, staff does not recommend assigning the remaining funds until a mid-year review or the next budget process. Current reserve levels provide adequate stability for the present fiscal year; however, challenges remain. Staff will continue to monitor revenue trends, expenditure savings, and reserve levels to ensure the City remains positioned to navigate long-term fiscal challenges.

BUSINESS OF THE COUNCIL OF THE CITY OF HALF MOON BAY

AGENDA REPORT

For meeting of: **September 16, 2025**

TO: Honorable Mayor and City Council

VIA: Matthew Chidester, City Manager

FROM: Karen Decker, Economic and Community Vitality Manager
Julissa Acosta, Management Analyst

TITLE: **OPPORTUNITY CENTER OF THE COASTSIDE**

RECOMMENDATION:

Adopt a resolution authorizing the City Manager to: 1) fund utilities and janitorial services at the Opportunity Center of the Coastsides through January 2026 in an amount not to exceed \$10,000, and 2) extend the professional service agreements with JobTrain, Renaissance Entrepreneurship Center, the Chamber of Commerce, and American Energy Society with a term ending January 15, 2026.

FISCAL IMPACT:

Costs to cover utilities and janitorial services at the Opportunity Center for up to four months will not exceed \$10,000, which could be funded through several different sources described below. There is no fiscal impact on the City resulting from the amendments to the professional services agreements. Any services provided during the extended period will be funded by revenue streams identified by the service providers.

STRATEGIC ELEMENT:

This recommendation supports the *Fiscal Sustainability, Healthy Communities and Public Safety, and Inclusive Governance* Elements of the Strategic Plan.

BACKGROUND:

In 2022, the San Mateo County Board of Supervisors approved a \$2,500,000 funding allocation to support the development of the Opportunity Center of the Coastsides (OCC) – a first-of-its-kind service center for job seekers, small businesses, and entrepreneurs. The funding allocation was paid for through State and Local Fiscal Recovery Funds from the federal American Rescue Plan Act (ARPA). On February 7, 2023, City Council authorized staff to accept the grant and create a new economic advancement center. That grant is scheduled to end September 30. On September 2, City Council [received an update](#) on the OCC, including a recently published formative evaluation performed by a third party (Attachment 1) and funded by the Chan Zuckerberg Initiative. Contractual agreements between the City and the service providers

(JobTrain, Renaissance Entrepreneurship Center, the Chamber of Commerce, and American Energy Society) are also set to expire September 30.

DISCUSSION:

At this time, there is no identified funding stream to continue OCC services, though a considerable philanthropic opportunity stewarded by JobTrain and Renaissance is pending. City staff submitted a proposal to San Mateo County, which is currently under review. The cities of Half Moon Bay and South San Francisco submitted a Congressionally Directed Spending request through the office of U.S. Senator Adam Schiff.

The City has a prepaid lease with HMBay Partners II, LLC that expires January 14, 2026, and the Chamber has a sublease agreement with the City to rent a portion of the facility for its operations. Lease costs are covered through the term of the lease, but utilities and janitorial services are not. Staff recommend that Council authorize no-cost contract extensions to the current service providers to allow for an additional quarter of service provision and for potential funding to be realized. Staff also recommend that Council approve \$10,000 to cover utilities and maintenance costs. Funds could be drawn from the Affordable Housing Fund (since participation in the labor market mitigates homelessness), which has an unassigned fund balance of \$1.6 million. Additional alternative sources of funding include the CSFA program where staff anticipate a cost savings in technical assistance, or from the general fund.

The funding provided through the County has been instrumental to the Coastsides, which has never had employment or entrepreneurship services that are locally accessible. Continued investment in programs that serve our most affected residents is critical to ensure a vibrant, equitable and resilient Coastsides economy.

ATTACHMENTS:

- 1) Resolution
- 2) Evaluation

RESOLUTION NO. C-2025-66

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF HALF MOON BAY AUTHORIZING FUNDING FOR UTILITIES AND JANITORIAL SERVICES AT THE OPPORTUNITY CENTER OF THE COASTSIDE NOT TO EXCEED \$10,000, AND EXTENDING PROFESSIONAL SERVICE AGREEMENTS WITH SERVICE PROVIDERS THROUGH JANUARY 14, 2026

WHEREAS, the City of Half Moon Bay (“City”) has demonstrated its commitment to supporting individuals and businesses impacted by the COVID-19 pandemic and to positioning the Coastside economy for long-term resiliency through the Coastside Recovery Initiative; and

WHEREAS, the San Mateo County Board of Supervisors allocated \$2,500,000 to support the development of the Opportunity Center of the Coastside (OCC), a first-of-its-kind service center providing workforce, small business, and entrepreneurship services; and

WHEREAS, on February 7, 2023, the City Council authorized acceptance of the County grant and the creation of the new economic advancement center with qualified service providers retained through a competitive process; and

WHEREAS, through partnerships with JobTrain, Renaissance Entrepreneurship Center, American Energy Society, and the Chamber of Commerce, the OCC delivers comprehensive services including rapid employment assistance, small business development, entrepreneurial incubation, and local business support; and

WHEREAS, the City’s agreement with San Mateo County is scheduled to expire on September 30, 2025, and all related professional service provider contracts are currently set to conclude at the same time; and

WHEREAS, the City’s pre-paid lease for the OCC premises at 633-635-637 Main Street extends through January 14, 2026, but does not include utilities and janitorial services, requiring an estimated \$10,000 in funding to maintain operations through the lease term; and

WHEREAS, extending existing service provider agreements through January 14, 2026, will provide additional time to secure future funding, allow services to be scaled, and support continuity for residents and businesses reliant on the OCC.

NOW, THEREFORE, BE IT RESOLVED THAT THE CITY COUNCIL OF HALF MOON BAY AUTHORIZES THE CITY MANAGER TO:

1. Fund utilities and janitorial services at the Opportunity Center of the Coastsides through January 2026 in an amount not to exceed \$10,000; and
2. Amend contract terms by extending professional service agreements with JobTrain, Renaissance Entrepreneurship Center, the Chamber of Commerce, and American Energy Society with a term ending January 14, 2026.

I, the undersigned, hereby certify that the foregoing Resolution was duly passed and adopted on the 16th day of September 2025, by the City Council of Half Moon Bay by the following vote:

AYES, Councilmembers:
NOES, Councilmembers:
ABSENT, Councilmembers:
ABSTAIN, Councilmembers:

ATTEST:

APPROVED:

Maggie Rodriguez, Assistant City Clerk

Robert Brownstone, Mayor

Final Report on the Formative Evaluation of Three Economic Advancement Centers in San Mateo County

August 15, 2025

Prepared by:

Steven LaFrance and Sarah Illing, [Head+Heart Advisory](#)



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I. EXECUTIVE SUMMARY

About this Report

This formative evaluation report summarizes learnings from three San Mateo County Economic Advancement Centers (EACs or “the Centers”) which opened at different timepoints starting in 2021 in three communities: South San Francisco (2021), North Fair Oaks (2023), and Half Moon Bay (2024).

The Centers were opened to respond to community needs, namely: high unemployment rates during the COVID-19 public health crisis and the growing divide between the County’s booming industries and small businesses (often owned by immigrants and families).

Head and Heart Advisory, a professional consulting firm, conducted this formative study using a multi-method evaluation design drawing on a range of quantitative and qualitative data sources. The study was conducted in the early stages of the Centers' developmental life cycle to inform learning across, and improvement within, the three EACs regarding effectiveness of implementation, what could be strengthened, and what outcomes they are achieving for their clients and communities.

Community Contexts

The three EACs are situated in racially and ethnically diverse communities which include some of the most economically stressed residents of San Mateo County whose earnings are far outpaced by the high cost of living. Prior to the opening of the EACs, these three communities had relatively limited social services readily available and shared the common need for more economic opportunity for local residents.

Interviewees consistently shared that the EACs fill deep and persistent gaps in local workforce and economic development systems. The EACs introduced walk-in, multilingual, culturally competent service hubs that address a range of needs – job placement, skills training, entrepreneurship and small business support, housing and food access, and legal aid – under one roof. Moreover, community leaders and subject matter experts consistently expressed that EACs contribute to broader economic and community development goals.

Client-Level Outcomes

JobTrain helps participants gain skills and connections needed to gain employment. Focus group participants said that JobTrain helped them learn to be proactive and communicate during job searches, prepare for interviews, develop their resumes, cover letters and references. Additionally, JobTrain helped clients to access unemployment benefits, seek practical support (like gift cards), and prepare for opportunities to acquire certifications.

Across all three EACs, JobTrain clients received a total of 778 job placements. Clients' job placement hourly wage was generally around \$22/hour, with typical hours around 35/hours week. (For comparison, a living wage for **two adults and two children** in San Mateo County is \$46.95/hour, according to MIT's 2025 living wage calculator, and thus the average wage for a single worker placed in a job through the EACs is not far from the living-wage bar.) Multiple clients expressed gratitude for the differences that JobTrain made in their lives.

Renaissance Entrepreneurship Center provides a cornerstone for entrepreneurial activity, delivering essential resources to help business owners start, stabilize, and scale their enterprises. According to quarterly client surveys, Renaissance clients grow

existing businesses, launched new businesses, improved their pre-existing websites, launched new websites, and invested into their businesses (see table below). Note that, because survey completion rates are low, the numbers reported only reflect a sample of Renaissance clients. In the table below, the number of unique (non-blank and non-zero) survey responses and the number of unique quarterly survey respondents are noted.

What difference has JobTrain made in clients' lives by helping them find work?

"JobTrain helped me find this job... and I'm making double. Hell yeah, it's greatly increased my salary, and I'm extremely thankful for that."

– JobTrain Client

"Now, I'm working with the County. I have health insurance.... I have a steady job, a good salary, and I can provide to my family."

– JobTrain Client

Renaissance Quarterly Survey Respondents' Revenue, Profits, Employees, and Investments

Renaissance Entrepreneurship Center: Revenue, Profits, Employees, and Investments			
	EAC-SSF (n=34 unique respondents in 47 total quarterly surveys submitted between 2021 Q2 and 2025 Q1)	EEC-NFO (n=29 unique respondents in 38 total quarterly surveys between 2024 Q1 and 2025 Q1)	OCC (n=11 unique respondents in 16 total quarterly surveys submitted between 2024 Q1 and 2025 Q1)
Gross Revenue/Sales (Quarterly)	Total gross revenue reported: \$539,181 (26 unique respondents in 33 total quarterly surveys)	Total gross revenue reported: \$437,521 (19 unique respondents in 25 total quarterly surveys)	Total gross revenue reported: \$15,935 (5 unique respondents in 6 total quarterly surveys)
Profit / Losses	Net profit: \$97,720 (19 unique respondents in 26 total quarterly surveys)	Net profit: \$93,656 (18 unique respondents in 20 total quarterly surveys)	Net profit: \$3,371 (3 unique respondents in 4 total quarterly surveys)
Number of Part-Time Employees	10 part-time employees (7 unique respondents in 7 total quarterly surveys)	13 part-time employees (8 unique respondents in 9 total quarterly surveys)	3 part-time employees (2 unique respondents in 2 total quarterly surveys)

Renaissance Quarterly Survey Respondents' Revenue, Profits, Employees, and Investments

Renaissance Entrepreneurship Center: Revenue, Profits, Employees, and Investments			
	EAC-SSF (n=34 unique respondents in 47 total quarterly surveys submitted between 2021 Q2 and 2025 Q1)	EEC-NFO (n=29 unique respondents in 38 total quarterly surveys between 2024 Q1 and 2025 Q1)	OCC (n=11 unique respondents in 16 total quarterly surveys submitted between 2024 Q1 and 2025 Q1)
Number of Full-Time Employees	10 full-time employees (9 unique respondents in 9 total quarterly surveys)	9 full-time employees (8 unique respondents in 8 total quarterly surveys)	2 full-time employees (2 unique respondents in 2 total quarterly surveys)
Amount You Invested in Your Business	Total invested: \$340,311 (25 unique respondents in 32 total quarterly surveys)	Total invested: \$258,200 (22 unique respondents in 28 total quarterly surveys)	Total invested: \$24,679 (9 unique respondents in 13 total quarterly surveys)

Through interviews, Renaissance clients shared overwhelmingly positive feedback, and they reported that they made impactful changes to their business practices as a result of what they learned. Key examples of changes made include: obtaining business licenses, expanding their businesses through improved marketing, formalizing their businesses (e.g., using contracts and paying payroll taxes), and adjusting prices to increase profitability.

Community-Level Outcomes and Impacts of the EACs

The EACs contribute uniquely to local economies by offering co-located, community-centered, and culturally competent services. Their physical presence in neighborhoods, emphasis on collaboration, and client-centered models are distinct advantages. Providers described ways in which the EACs have helped families access multiple forms of support and to develop a plan to reach their economic and career goals. The EACs contribute to building a diverse business ecosystem by promoting equitable access to resources such as capital, mentorship, and technology.

The EACs also reach and engage the segments of San Mateo County with the highest barriers to employment and economic advancement opportunities. ARPA (American Rescue Plan Act) dollars that became available in the early years of the COVID-19 pandemic provided the initial seed and launch funding for the EACs. ARPA funding was intended to support economic stability, opportunity, and advancement among the most vulnerable and at-risk community residents. The findings of this study certainly uphold that the funding has gone to serve and support the intended target population. High percentages of job-seeking clients have limited English proficiency (between 58% of OCC clients and 65% of both EAC-SSF and EEC-NFO clients), are unemployed at intake (59% of OCC clients, 66% of EAC-SFF clients, and 68% of EEC-NFO clients), and have only completed high school, high school equivalent, or less than a

high school education (62% of EAC-SFF clients, 70% of EEC-NFO clients, and 72% of OCC clients). Similarly, the vast majority (92% of EAC-SSF clients, 95% of EEC-NFO clients, and 95% of OCC clients) of entrepreneurs seeking assistance starting, sustaining, or building their small businesses report their household income as extremely low to moderate under the HUD income bands, meaning their income is 120% of Area Median Income (AMI) or less. The EACs also serve clients who are primarily people of color with only 4-12% of JobTrain clients identifying as non-Hispanic white.

Furthermore, while the EACs strengthen resilience and economic mobility among the most marginalized community members they are more cost effective compared to similar programs. For example, this study finds the per-participant cost of serving clients at the EACs is lower than the typical range for federal WIOA (Workforce Innovation and Opportunity Act) workforce development programs as well as the typical range for philanthropy-funded programs.

Lastly, and importantly, communities benefit greatly, in many ways, from residents' participation in the labor market and economy through employment and entrepreneurship. These benefits include greater purchasing, local spending power, and local economic multiplier effects; community members employed; increased tax revenue; increased retail vibrancy and service availability; reduced stress among community members and other community protective factors including enhanced social cohesion, civic participation, and potential community stabilization; and reduced public expenditures. Head and Heart conducted exploratory research in the categories of potential governmental cost savings that these EACs could be contributing to their communities and to federal funding sources. Specifically, this study explored potential savings in public benefits costs (CalFresh, Medi-Cal, General Assistance, housing assistance, and Unemployment Insurance) resulting from a client who was unemployed at the time of intake at the EAC-SSF and then got a job earning \$22/hour. This study found a total estimated cost savings of \$20,000 to \$60,000 per year per person, depending on previous use of public assistance and experience of risk factors.

Conclusion

This formative evaluation study points to clear early successes with the EACs in terms of client- and community-level outcomes. It also highlights opportunities to prepare for and build data capacity to enable a future summative impact study.

The study also explores the importance of economic advancement strategies as a lever toward dismantling structural barriers to opportunities and well-being (e.g., poor health, education, and civic outcomes are associated with economic inequity) and how investments in these strategies can unlock economic growth, resilience, and innovation in marginalized communities.

II. INTRODUCTION AND BACKGROUND

This report summarizes findings from a formative evaluation of the three economic advancement centers (EACs) which opened at different timepoints starting in 2021 in three communities: South San Francisco (2021), North Fair Oaks (2023), and Half Moon Bay (2024). These economic advancement centers (collectively referred to as “the Centers”) were opened in response to identified needs for services and supports among job seekers, and emerging and established small business owners, during the COVID-19 pandemic lockdown and public health crisis. While the three Centers are in different stages of development and operation, each was interested in harnessing learning from their respective and collective experiences to inform their programmatic strategy and optimize their long-term financial sustainability by understanding and communicating the value they deliver to their communities and how they can be most effective and relevant moving forward. The architects and implementers of the Centers engaged a professional third-party evaluation consultancy, Head and Heart Advisory, to design and conduct this study.

Background: Origins of the Economic Advancement Centers (EACs)

The **Economic Advancement Center in South San Francisco (EAC-SSF)** was the first to open its doors (virtually in July 2021 and then officially in February 2022) in response to high unemployment rates at the peak of COVID and the growing divide between the city’s booming biotech sector and small family, immigrant-owned businesses.¹ Located in one of the city’s lowest income census tracts, the EAC-SSF offers rapid job placement services and career pathway programs along with the city’s workforce development program, as well as small business and entrepreneurship support services to residents and existing small business owners of South San Francisco and throughout North San Mateo County. The City of South San Francisco is partnering with Renaissance Entrepreneurship Center and JobTrain to deliver these services. The services have since been expanded to some social services system navigation staff provided under the City of South San Francisco’s Promotores Program. Clients are referred to housing, food security, and health care services. The YMCA and County Health also have a presence in the space on a weekly basis. The EAC-SSF has grown to a more holistic collage of economic mobility services than initially envisioned. Moreover, early results exceeded initial goals in terms of clients served, and there is ongoing high demand for services as reflected in wait lists for services and program offerings. Historically, South San Francisco and North San Mateo County have been described as resource deserts where people had to travel outside of the area for needed services and support, contributing to low engagement with services among residents in the past.

¹ Proposal to Evaluate Implementation of Economic Advancement Centers in Three San Mateo County communities submitted to Chan Zuckerberg Initiative on August 30, 2022.

In March 2021, the County entered into an MOU with SSF for \$200,000 – half for operations and half for small business support services – framed at the time as a “pilot program.” Given the early successes of the EAC-SSF, the San Mateo County Board of Supervisors then allocated \$5 million to develop two additional centers, one in Half Moon Bay and one in the unincorporated area of North Fair Oaks.

In July 2023, the **Economic and Employment Center (EEC)** opened in the unincorporated area of North Fair Oaks (NFO). One of the EEC’s core partners (also working with the EAC in South San Francisco and the OCC in Half Moon Bay), Renaissance Entrepreneurship Center, conducted a feasibility study in planning for the EEC that found strong interest among businesses, local leaders, and residents for an array of supports. Based on the study findings, the EEC provides employment support services to job seekers as well as entrepreneurship training and supports to small businesses including consulting, networking, workshops, training, and access to capital. Through its programming, the EEC aims to empower individuals in the NFO community and to transform lives through employment and entrepreneurship.

In January 2024, the City of Half Moon Bay opened the **Opportunity Center of the Coastsides (OCC)** as part of a larger comprehensive economic effort to address COVID-19 recovery needs and pave the way for a more sustainable and resilient future, as laid out in the 2022 Coastsides Recovery Report entitled, “[Building a More Equitable, Vibrant, and Resilient Coastsides Economy.](#)” The Coastsides region is uniquely vulnerable due its geographic isolation, lack of economic diversity and job growth, income inequality, high cost of housing, and lack of services and infrastructure. Co-located with the Coastsides Chamber of Commerce, the OCC houses workforce development programming, small business support, and a business incubator to harness the Coastsides’s unique industries and assets, build entrepreneurship capacity, and support business and job growth. The OCC brings together multiple nonprofits dedicated to helping the Coastsides work, providing classes, programs, and mentoring services for entrepreneurs, business owners, and those looking for work or new skills.

About Head and Heart Advisory

Head and Heart Advisory is a professional consulting firm that works with public agencies, philanthropic foundations, and nonprofit organizations in developing strategy, understanding outcomes, and building the culture and practice of reflection and learning to achieve more equitable outcomes for communities and a sustainable future for the planet. Head and Heart’s specific service offerings include:

- **Evaluation and Learning:** Articulate the role of data and learning in programmatic and organizational strategies, develop strategic learning frameworks, and understand the centrality of embedding equity in culture and practice of learning to unlock potential for achieving better, more equitable outcomes.
- **Strategy:** Move beyond conventional strategic planning processes by defining the imperatives for planning at any given time, understanding the organization’s

developmental stage and the ecosystem within which an organization operates, to right-size the planning process and approach accordingly.

- **Building Skills and Organizational Strength:** Take organizational and programmatic skillsets and ability to the next level to achieve better, more equitable outcomes by learning and integrating new approaches and frameworks that center principles of equity into culture and practice.

Purposes of the Evaluation

Given how early in the Centers' developmental lifecycle stage this formative study was conducted, the study's primary purpose is to inform learning about and improvement at the EACs – i.e., how well they are functioning, what could be improved, and what they are achieving for clients who use their services. The study also sought to surface recommendations for programmatic strategy moving forward, including what data are needed at the local level to continue to track processes, outcomes, and learning on an ongoing basis.

Once the EACs have more time and experience under their belts, including implementing the recommendations from this study (particularly around client-level data collection), it will be appropriate to conduct a summative evaluation (i.e., one that is primarily focused on outcomes and can draw more definitive conclusions regarding client impacts through a quasi-experimental research design). As part of a summative evaluation, with the required data in hand (as per the recommendations in this report), a formal cost-benefit analysis can be conducted (whereas at this time only estimates can be calculated given limitations in data availability).

The following questions – organized by type – guided the current study.

Process and Implementation Evaluation and Learning Questions

- What are the characteristics of program participants in each community?
- How well do the array of programs and services at each Center function in concert with each other? Are there programs and services that are not working well in the mix? Are there programs and services that are missing?
- What are the key learnings to date regarding what it takes to design and operate effective economic advancement centers in these communities? What was common to each community and what was different?
- How well have the various partnerships in place for operating the Centers and delivering programs and services been functioning? What has been working well and what could be improved?
- How have the centers been funded to date, what are the current funding constraints / realities today (as COVID relief funds dry up), and what efforts are underway and needed to ensure financial sustainability? What is a sustainable funding model moving forward?

- What are considered best practices and top priorities among funders and in the research for workforce development and community economic development centers and to what extent do the EAC-SFF, EEC-NFO, and OCC implement these best practices?

Outcome Evaluation and Learning Questions

- What are the early outcomes and results of the services provided at the EAC-SFF, EEC-NFO, and OCC among program participants?
- What stories and testimonials speak to the value of the Centers for residents and the community as a whole?
- What factors facilitate or inhibit achievement of progress and outcomes for program participants?
- What was available for job seekers, small businesses, and entrepreneurs in the three communities before the Centers were opened? How did – and do – the landscape in these communities, in San Mateo County more broadly, and in other California Counties compare? What gaps did the Centers fill in each of the three communities?
- What unique contributions do the EAC-SFF, EEC-NFO, and OCC make to the local workforce development systems in their respective communities?
- What is an estimate of programmatic costs per program participant and what do those costs return to those participants – and the community? How do these costs compare with known standards?

The next chapter of the report describes the evaluation methods used to address these questions.

III. EVALUATION METHODS

To explore the process-, implementation-, and outcome-related questions in the previous chapter, Head and Heart used a multi-method evaluation design, drawing upon a range of quantitative and qualitative data sources.

Quantitative Data Sources and Analysis

All three Centers provided data files which aggregate the information they have collected since their opening. The timeframes for these data files are as follows:

- **EAC-SSF:** 7/1/21 - 4/30/25
- **EEC-NFO:** 7/10/23 - 4/30/25
- **OCC:** 1/1/24 - 4/30/25

Head and Heart analyzed these data files and worked with Center staff to understand which data points are most reliable and relevant for evaluation purposes. In particular, the evaluation team focused on synthesizing data related to: client demographics, program participation, service delivery (e.g., number and types of services), and individual-level outcome measures.

Head and Heart also reviewed and mined the Centers' quarterly reports, which contain both quantitative and qualitative data, and analyzed operating and program delivery costs for the Centers to estimate per-client expenses.

Qualitative Data Sources and Analysis

Through interviews and focus groups with clients, Head and Heart learned about clients' satisfaction and experiences with the Centers' programs and services, what served them well, and what could be improved. A total of nine (9) Renaissance Entrepreneurship clients participated in one-on-one interviews. A total of 24 JobTrain clients participated in three focus groups in May 2025. Two focus groups were conducted in English (with some simultaneous Spanish-English interpretation), and one focus group was conducted in Spanish.

As mentioned above, Head and Heart reviewed Centers' quarterly reports which contain qualitative data (e.g., client testimonies), in addition to quantitative data. To learn about systems- and community-level outcomes, Head and Heart conducted 10 interviews with funders and community leaders and subject matter experts who hold the broader perspective of how the economic advancement centers fit within the local workforce and economic development systems. Head and Heart also conducted 12 provider interviews with representatives of Renaissance, JobTrain, and other partners (e.g., YMCA, Coastside Venture Studio, Chamber of Commerce). Lastly, Head and Heart reviewed available literature in order to ground and contextualize the inquiry around: local community contexts (including services available before EACs opened); workforce development program costs; and cost savings to public agencies from job placement programs.

Strengths and Limitations

The primary strength of the multi-modal methods employed for this evaluation is the broad array and diversity of data, from both quantitative (e.g., client data records, quarterly reports) and qualitative (e.g., provider and client interviews, client focus groups) sources. This mix of methods provides the opportunity to triangulate findings by examining a research question from multiple angles to enhance the validity and credibility of conclusions.

Head and Heart provided each participant in Renaissance interviews and JobTrain focus groups with a \$50 gift card to recognize the importance of clients' perspectives and to value their time concretely and equitably. The Head and Heart team is grateful to JobTrain and Renaissance staff who made the interviews and focus groups possible by reaching out to clients and (in the case of JobTrain focus groups), creating a welcoming physical space and following up with participants to deliver their gift cards after the focus groups.

The evaluation also draws strength from multi-stakeholder collaboration and partnerships. Throughout the process, Head and Heart met with Center stakeholders to shape the evaluation approach, interpret preliminary findings, and inform the interview questions. Head and Heart also engaged in a collaborative meaning-making process before finalizing the report.

The primary limitation of this evaluation are the gaps in available client data. The EACs opened during (or close to) the time of the COVID-19 pandemic lockdown which was both chaotic and disorienting for people and organizations. Fortunately, this study surfaced the opportunities for strengthening client-level data collection; recommendations are included in this report.

Through focus groups and interviews, Head and Heart spoke to a sample of JobTrain and Renaissance clients. It is possible that self-selection bias was at play with clients who chose to participate in focus groups and interviews. Head and Heart did not speak to a subset of clients who dropped out or who likely did not find the services provided by the Centers useful. That said, the purpose of this study was to explore outcomes and surface learning for program improvement, rather than to make definitive conclusions about program impacts.

Another important caveat is that data collection happened early in clients' engagement with Renaissance Entrepreneurship Center. According to experts in small business entrepreneurship, it can often take up to three years for small businesses to hit their stride, meaning that some of Renaissance's potential impacts may not yet be realized, particularly for clients served in the more recently opened EACs in North Fair Oaks (EEC-NFO) and Half Moon Bay (OCC).

Lastly, beyond JobTrain and Renaissance, Head and Heart did not have quantitative client-level information to work with for this report for other partner providers at the EACs (e.g., YMCA, Promotores) other than what was included in quarterly reports. That said, Head and Heart did interview representatives of partner providers and in this way included their perspectives.

IV. THE COMMUNITY CONTEXTS FOR EACH OF THE THREE EACs

Why Community Context Matters

Taking community context into account when designing and evaluating workforce development and economic advancement programs is essential for ensuring that the programs are relevant and effective – and that any study of them is appropriate, equitable, and useful. Below are key reasons why community context matters for these EACs and this study evaluating services in three different San Mateo County communities, all sharing in common the need for supporting economic opportunity for local residents.

1. **Context Shapes Barriers and Opportunities.** Each community has distinct economic conditions, cultural norms, demographics, infrastructure, and social dynamics that influence how residents experience barriers to employment and economic mobility. For example, in communities with a high percentage of non-English speakers, standard outreach or training materials may fail to engage potential participants without translation or cultural adaptation.
2. **Programs Must Be Responsive to Local Needs.** Understanding the local context is crucial for ensuring the program is aligned with the actual needs and priorities of the target population.
3. **Equity and Inclusion Require Contextual Understanding.** Community context often includes historical and structural inequities, such as systemic racism, disinvestment, or discriminatory practices, that shape residents' economic opportunities.
4. **Community Trust and Engagement Are Crucial.** Programs often depend on community trust, partnerships, and local knowledge to reach and retain participants.
5. **Sustainability and Scalability Depend on Fit.** The local context of other available programs and services factors heavily into the determination of whether a unique need is being met, which can significantly impact program sustainability and scalability.

Given these factors, the following section describes the three communities in which the EACs operate.

South San Francisco

South San Francisco is a diverse community in San Mateo County. The following provides an overview of the City's local economic drivers and its demographic profile.²



Local Economic Drivers

- **Key Industries:**
 - **Biotechnology:** South San Francisco is known as the "Birthplace of Biotechnology," housing over 250 biotech companies, including Genentech, Amgen, and Verily Life Sciences.³
 - **Healthcare and Social Assistance:** Employs approximately 5,696 residents.⁴
 - **Professional, Scientific, and Technical Services:** Employs around 4,550 residents.⁵
 - **Retail Trade:** Employs about 4,111 residents.⁶
- **Top Employers:**
 - Genentech: 8,632 employees
 - Kaiser Permanente: 1,000–4,999 employees
 - AbbVie: 1,000 employees

² Many of the data points in this chapter are based on US Census data, which is the most comprehensive publicly available data source. It is important to note that Census data may be inaccurate due to inequities in the Census method which cause some groups to be undercounted. Advocates and policymakers alike recognize that President Trump's restrictive immigration policies and attempts to "weaponize" the Census (including an unsuccessful push to include a citizenship question) might have had a "chilling effect," discouraging Hispanic/Latinx people from completing surveys in 2020.

³ [Biotech in SSF - City of South San Francisco web page](#).

⁴ 2023 American Community Survey 5-Year Estimate, as cited in [Data USA](#).

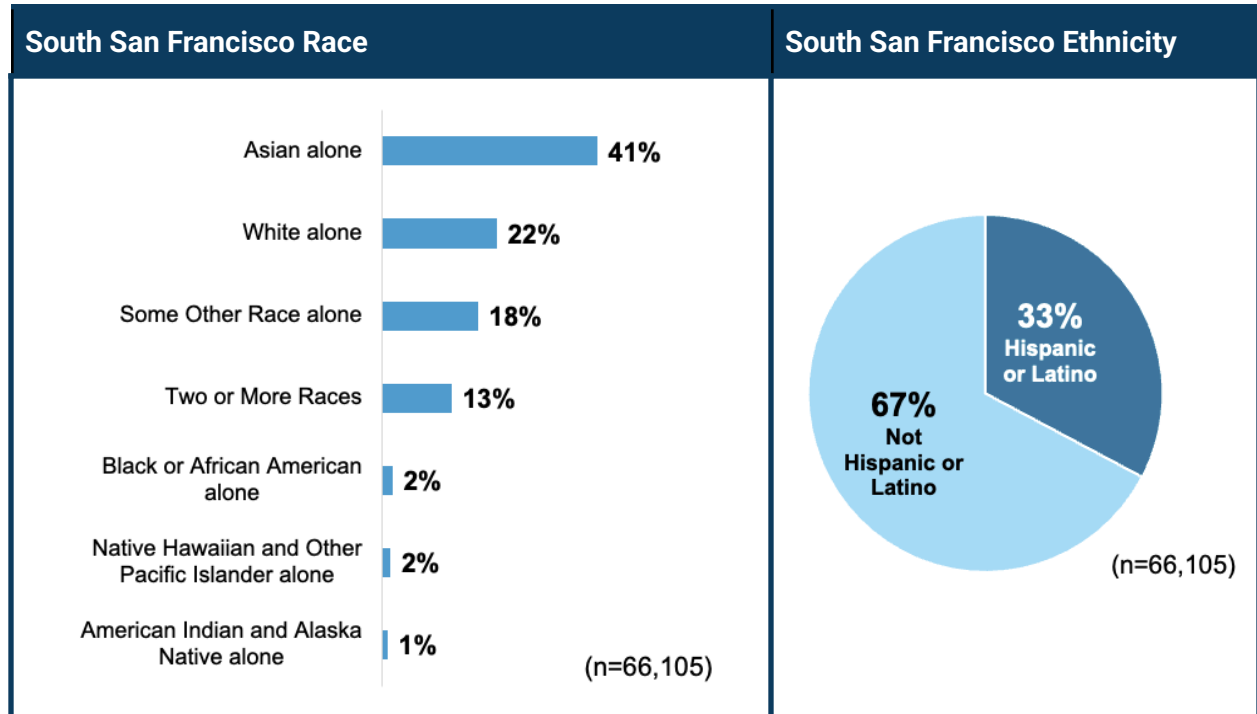
⁵ 2023 American Community Survey 5-Year Estimate, as cited in [Data USA](#).

⁶ 2023 American Community Survey 5-Year Estimate, as cited in [Data USA](#).

Demographic Characteristics

- **Population:** Approximately 64,487 residents as of 2023.⁷
- **Racial/Ethnic Composition:** As shown in Chart 1 below, the largest racial group in South San Francisco is Asian alone (41%), followed by White alone (22%). Approximately one-third (33%) of South San Francisco residents identify as Hispanic or Latino.⁸

Charts 1-2: South San Francisco Race and Ethnicity
(US Census Bureau, 2020 Census Demographic and Housing Characteristics File)



- **Foreign-Born Residents:** Approximately 40% of the population is foreign-born, significantly higher than the national average of 14%.⁹
- **Highest Level of Education Achieved.** According to the 2023 American Community Survey 5-year estimates (ACS), 86% of adults have at least a high school diploma or equivalent and 40% have a bachelor's degree or higher.¹⁰
- **Median Property Value:** \$1.16M in 2023, with 61% home ownership.¹¹
- **Median Household Income:** \$135,909, with a 7% poverty rate¹² and 3.3% unemployment rate.¹³ Note that the poverty rate is highest among Hispanic women (19%).¹⁴
- **Median Age:** 42 years.¹⁵

⁷ 2023 American Community Survey, as cited in [Point2Homes](#).

⁸ See 2020 Decennial Census, [P8 RACE file](#) and [P9 ETHNICITY file](#).

⁹ 2023 American Community Survey 5-Year Estimate, as cited in [Data USA](#).

¹⁰ U.S. Census Bureau (2023). American Community Survey 5-year estimates. Retrieved from Census Reporter Profile page for South San Francisco, CA <<http://censusreporter.org/profiles/16000US0673262-south-san-francisco-ca/>>

¹¹ 2023 American Community Survey 5-Year Estimate, as cited in [Data USA](#).

¹² 2023 American Community Survey 5-Year Estimate, as cited in [Data USA](#).

¹³ Bureau of Labor Statistics, as cited in [Y Charts](#).

¹⁴ 2023 American Community Survey 5-Year Estimate, as cited in [Data USA](#).

¹⁵ 2023 American Community Survey 5-Year Estimates. [US Census Bureau](#).

In addition to the Economic Advancement Center (EAC), South San Francisco offers a range of programs and services to assist low-income residents with employment, entrepreneurship, and meeting basic needs.

Employment Assistance

- **JobsNOW! Program.** This free employment initiative matches job seekers with employers and subsidizes salaries for up to six months, facilitating quicker hiring and skill development.
- **Mission Hiring Hall.** A nonprofit offering free counseling, training, and placement services, including vocational training in construction trades, project administration, security services, and hospitality job readiness.

Small Business Support

- **Small Business Support Programs.** The city offers various programs, including the Commercial Storefront Vandalism Relief Grant, providing up to \$1,000 per incident to businesses affected by vandalism.¹⁶
- **Business Resources.** South San Francisco collaborates with the Small Business Development Center (SBDC), hosted by Renaissance Entrepreneurship Center as part of their programmatic offerings, to offer no-cost expert advising and low-cost training for current and prospective small business owners.¹⁷
- **Green Business Program.** As articulated in the 2040 Shape South San Francisco Plan, SSF “encourages existing businesses and industries to participate in the San Mateo County Green Business Program,” which offers technical assistance and resources to small and medium-sized businesses aiming to become certified green businesses. Benefits include cost savings through energy and water conservation and waste minimization.

Basic Needs Assistance

- **YMCA Community Resource Center (CRC)** offers emergency support services, including crisis intervention and referrals, to stabilize living situations.
- **Rental Assistance.** The YMCA CRC provides rental assistance to eligible residents.
- **Core Service Agencies.** San Mateo County's Core Service Agencies offer safety net services such as food, emergency housing assistance, and utility assistance to residents in need.¹⁸

¹⁶ City of SSF: [Small Business Support Programs](#)

¹⁷ City of SSF: [Business Resources](#)

¹⁸ San Mateo County: [Core Service Agencies - Emergency Safety Net Assistance](#)

North Fair Oaks

North Fair Oaks is a diverse and predominantly Hispanic/Latino community with a young median age. The economy is supported by various industries, including administrative services, professional sectors, and retail trade.



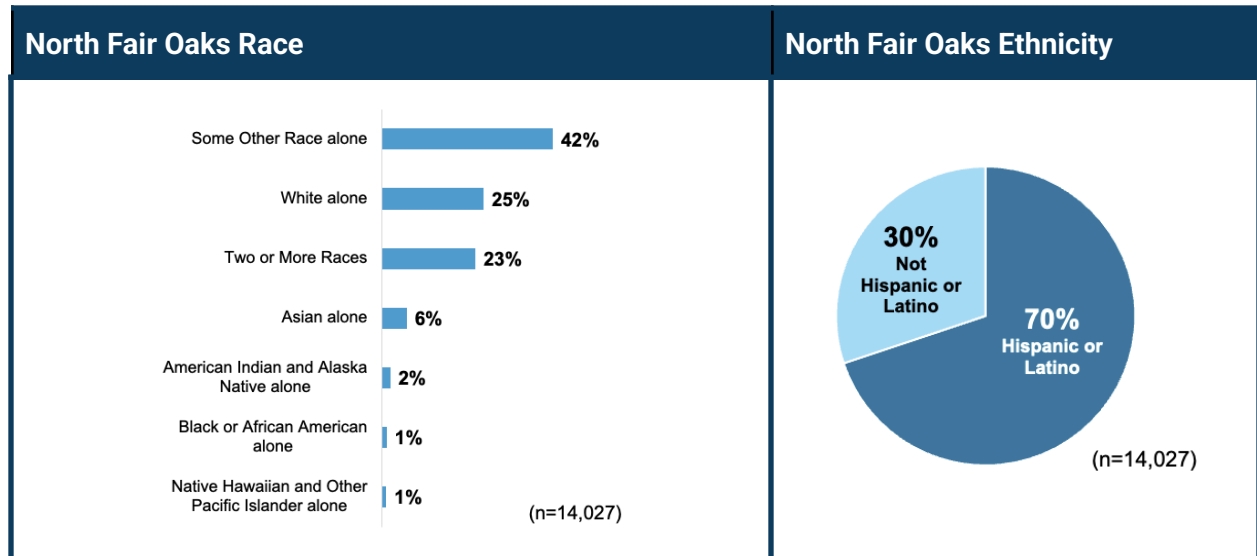
Local Economic Drivers

- **Key Industries:**¹⁹
 - Administrative & Support & Waste Management Services: 820 employees.
 - Professional, Scientific, & Technical Services: 670 employees.
 - Retail Trade: 613 employees.

Demographic Characteristics

- **Population:** Approximately 13,327 residents as of 2023.²⁰
- **Racial/Ethnic Composition:** As shown in Chart 3 below, the largest racial group in North Fair Oaks is some other race (42%), followed by white alone (25%). Seventy percent (70%) of North Fair Oaks residents identify as Hispanic or Latino.²¹

Charts 3-4: North Fair Oaks Race and Ethnicity
(US Census Bureau, 2020 Census Demographic and Housing Characteristics File)



- **Foreign-Born Residents:** Approximately 39% of residents were born outside the United States.²²

¹⁹ 2023 American Community Survey 5-Year Estimate, as cited in [Data USA](#).

²⁰ 2023 American Community Survey 5-Year Estimate, as cited in [Data USA](#).

²¹ See 2020 Decennial Census, [P8 RACE file](#) and [P9 ETHNICITY file](#).

²² 2023 American Community Survey 5-Year Estimate, as cited in [Data USA](#).

- **Highest Level of Education Achieved.** According to the 2023 American Community Survey 5-year estimates (ACS), 71% of adults have at least a high school diploma or equivalent and 27% have a bachelor's degree or higher.²³
- **Median Property Value:** \$1.21M in 2023, with 52% home ownership.²⁴
- **Median Household Income:** \$106,690, with a 13% poverty rate. Note that the poverty rate is highest among Hispanic women (26%).²⁵
- **Median Age:** 33 years, indicating a relatively young population.

In addition to the Economic and Employment Center (EEC), the following programs and services are available to low-income residents of North Fair Oaks with employment, entrepreneurship, and basic needs.

Employment Assistance

- **[San Mateo County Employment Services](#).** The County offers specialized training, job search workshops, computer and fax access, and individual support to assist residents in finding employment.

Small Business Support

- **[San Mateo Small Business Development Center \(SBDC\)](#).** The SBDC, hosted by Renaissance Entrepreneurship Center as part of their programmatic offerings, supports local entrepreneurs and small businesses with tools and insights to start and grow their ventures. Services include business planning, financial management, and marketing strategies.²⁶ **Middlefield Road Small Business Assistance Program.** In response to the Middlefield Road Improvement Project, the County allocated \$985,000 to fund a grant program for eligible small businesses in North Fair Oaks negatively impacted by the project.²⁷
- **[Green Business Program](#).** San Mateo County, which governs North Fair Oaks, supports and provides technical assistance and certification through the Green Business Program. Businesses and community-based organizations in North Fair Oaks are fully eligible and encouraged to participate.

²³ U.S. Census Bureau (2023). American Community Survey 5-year estimates. Retrieved from Census Reporter Profile page for North Fair Oaks, CA <<http://censusreporter.org/profiles/16000US0651840-north-fair-oaks-ca/>>

²⁴ 2023 American Community Survey 5-Year Estimate, as cited in [Data USA](#).

²⁵ 2023 American Community Survey 5-Year Estimate, as cited in [Data USA](#).

²⁶ Governor's Office of Business and Economic Development: [Place-based strategies](#).

²⁷ See Board of Supervisors resolution about the Middlefield Road Small Business Assistance Program [here](#).

Basic Needs Assistance

- [Fair Oaks Community Center](#) provides services including:²⁸
 - Food assistance
 - Housing assistance
 - Emergency and social services
- [San Mateo County Public Assistance Programs](#). The County offers programs to help residents obtain health care, shelter, food, and other resources through services like Medi-Cal, CalFresh, and CalWORKs. While these programs are available to all County residents, practically speaking, Center participants in Half Moon Bay and South San Francisco shared that the geographic distance to travel from their communities to the Core Service Agencies makes them inaccessible.
- [El Concilio of San Mateo County](#) provides a comprehensive range of programs, including safety net navigation, individual support services, consumer protection, outreach and education, and environmental advocacy.

Half Moon Bay / Coastside

Half Moon Bay and the Coastside communities present a unique blend of affluent demographics, high living costs, and a strong reliance on both traditional industries like agriculture and fishing, as well as modern sectors such as professional services and tourism. While the area boasts high median incomes, the elevated cost of living poses challenges, particularly for lower-income residents.



Local Economic Drivers

- **Key Industries:**²⁹
 - **Professional, Scientific, and Technical Services:** Employs approximately 1,105 residents.
 - **Educational Services:** Employs around 706 residents.
 - **Retail Trade:** Employs about 551 residents.
- **Traditional Sectors:** Agriculture and fishing remain integral to the local economy, with local farms and the historic Pillar Point Harbor playing vital roles (as reported in [Business View](#) magazine).
- **Tourism:** A significant economic driver, bolstered by the region's coastal vistas, redwood forests, and agricultural areas (as reported in [Business View](#) magazine).

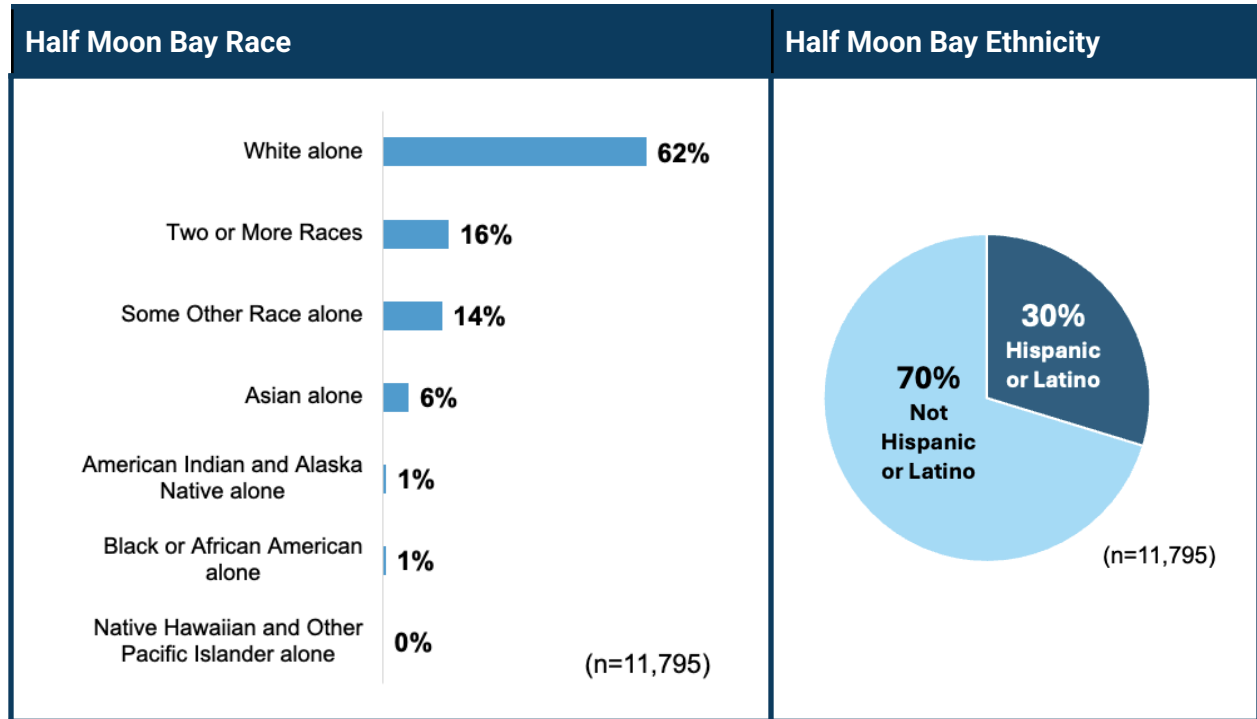
²⁸ To learn more, refer to Fair Oaks Community Center Information and Referral Program: <https://www.redwoodcity.org/departments/parks-recreation-and-community-services/do-you-need-help/information-referral>

²⁹ 2023 American Community Survey 5-Year Estimate, as cited in [Data USA](#).

Demographic Characteristics

- **Population:** Approximately 11,454 residents as of 2023.³⁰
- **Racial/Ethnic Composition:** As shown in Charts 5-6 below, the majority of Half Moon Bay residents identify their race as white alone (62%) and their ethnicity as “not Hispanic or Latino” (70%).³¹

Charts 5-6: Half Moon Bay Race and Ethnicity
(US Census Bureau, 2020 Census Demographic and Housing Characteristics File)



- **Foreign-Born Residents:** Approximately 21% of Half Moon Bay's residents are foreign-born, according to the most recent U.S. Census Bureau estimates for 2019–2023.³²
- **Highest Level of Education Achieved:** Per the 2023 American Community Survey 5-year estimates (ACS), 91% of adults have at least a high school diploma or equivalent and 53% have a bachelor's degree or higher.³³
- **Median Property Value:** \$1.47M in 2023, with 73% home ownership.³⁴
- **Median Household Income:** \$153,199, with a 6% poverty rate. The largest demographic living in poverty are Females 55 - 64.³⁵

³⁰ 2023 American Community Survey 5-Year Estimate, as cited in [Data USA](#).

³¹ See 2020 Decennial Census, [P8 RACE file](#) and [P9 ETHNICITY](#) file.

³² 2023 American Community Survey 5-Year Estimate, as cited in [Data USA](#).

³³ U.S. Census Bureau (2023). American Community Survey 5-year estimates. Retrieved from Census Reporter Profile page for Half Moon Bay, CA <<http://censusreporter.org/profiles/16000US0631708-half-moon-bay-ca/>>

³⁴ 2023 American Community Survey 5-Year Estimate, as cited in [Data USA](#).

³⁵ 2023 American Community Survey 5-Year Estimate, as cited in [Data USA](#).

- **Median Age:** 47 years, which is notably higher than both the California state median (38 years) and the San Francisco Bay Area median (40 years).³⁶

In addition to the Opportunity Center of the Coastsides (OCC), Half Moon Bay and the broader Coastsides region in San Mateo County offer a variety of programs and services to assist low-income residents with employment, entrepreneurship, and basic needs.

Employment Assistance

- **[Abundant Grace Coastsides Worker](#)**. This nonprofit offers job-readiness training programs for individuals experiencing homelessness, including: Farm Work Days, Farm Apprenticeship, and Conservation Crew.

Small Business Support

- **[Coastsides Venture Studio \(CSVs\)](#)**. Co-located at the OCC, and founded in 2024, CSVs is an incubator and accelerator program dedicated to supporting startups focused on resiliency technologies. It aims to foster scalable companies that contribute to an equitable and thriving Coastsides community.
- **[San Mateo Small Business Development Center \(SBDC\)](#)**. The SBDC, hosted by Renaissance Entrepreneurship Center as part of their programmatic offerings, supports local entrepreneurs and small businesses with tools and insights to start and grow their ventures. Services include business planning, financial management, and marketing strategies.³⁷
- **[Green Business Program](#)**. The City of Half Moon Bay supports the San Mateo County Green Business Program, which offers technical assistance and resources to small and medium-sized businesses aiming to become certified green businesses. Benefits include cost savings through energy and water conservation and waste minimization.

Basic Needs Assistance

- **[Coastsides Hope](#)** offers the following services:
 - Emergency & Supplemental Food Pantry
 - Rental & utility assistance
 - Shelter referrals
 - Immigration & citizenship services
 - Tax preparation assistance
 - Digital Navigator Program for technology skills

Coastsides Hope also functions as a Core Service Agency for the County, providing emergency safety net assistance including food, housing, and utility assistance.

³⁶ 2023 American Community Survey 5-Year Estimate, as cited in [Data USA](#).

³⁷ Governor's Office of Business and Economic Development: [Place-based strategies](#).

Importance of these Economic Advancement Centers in the Context of these Three Communities

As described above, these communities are racially / ethnically diverse and include some of the most economically stressed residents of San Mateo County whose earnings are far outpaced by the high cost of living. Moreover, prior to the opening of the EACs, these three communities had relatively limited social services readily available within them.

Community leaders and subject matter experts interviewed for this evaluation emphasized and lifted up these points as a means of underscoring the value of the EACs. Despite broader recovery trends, interviewees described the EAC communities as still economically vulnerable and at risk of being left behind:

- **South San Francisco** was described as lively and diverse, but still recovering from the pandemic with shuttered businesses and growing pressures from gentrification and industry shifts.
- **Half Moon Bay / Coastside** features a high degree of small, independent businesses and farmworker populations but is still challenged by a lack of formal business infrastructure and career pathways.
- **North Fair Oaks** was characterized by “pockets of low-income, historically underserved folks” and limited infrastructure, yet with the potential for revitalization through corridor improvements and local investment.

Within these communities’ contexts, interviewees consistently shared that the EACs fill deep and persistent gaps in the local workforce and economic development systems. Before the EACs were launched, all three communities faced significant structural barriers to accessing career development, small business support, and integrated services. Existing programs were described as fragmented, remote, inaccessible or non-existent—especially for low-income and immigrant residents. The EACs introduced walk-in, multilingual, culturally competent service hubs that address a range of needs – job placement, skills training, entrepreneurship support, housing and food access, and legal aid – under one roof.

Moreover, community leaders and subject matter experts consistently expressed that, from their perspective, the EACs contribute to broader economic and community development goals. The Centers play a visible role in revitalizing downtown corridors, countering commercial blight, and spurring microenterprise growth. In South San Francisco, the EAC turned an abandoned bank building into a vibrant community asset that has become a cornerstone of downtown redevelopment. Additionally, the Centers are positioned to contribute to emerging growth sectors such as biotech, hospitality, healthcare, and value-added agriculture – especially if workforce training programs evolve to align with these sectors.

V. PROCESS AND IMPLEMENTATION EVALUATION FINDINGS

This chapter summarizes program process and implementation-related findings, including the clients served at the EACs and the types of services they received from JobTrain and Renaissance Entrepreneurship Center. It also highlights the ways in which EAC providers have engaged in their communities to ensure services are promoted and accessible. The chapter concludes with a discussion of the factors contributing to early program success. Areas for program and service improvements are provided in the Recommendations chapter.

The client and business information highlighted in this section is based on data files provided by JobTrain and Renaissance Entrepreneurship Center. Note that the data file timeframes for each site (EAC-SSF, EEC-NFO, and OCC) differ based on how long each site has been open.

- **EAC-SSF:** 7/1/21 - 4/30/25
- **EEC-NFO:** 7/10/23 - 4/30/25
- **OCC:** 1/1/24 - 4/30/25

It is important to bear in mind that each of the three Centers first opened virtually to respond to community needs as promptly as possible during the COVID-19 lockdown. Services continued remotely while the Centers' physical facilities were prepared for opening. The following provides the schedule of service roll-out for each Center:

EAC-South San Francisco

- Remote services began July 2021
- Physical site opened January 2022

EEC-North Fair Oaks

- Remote services began July 2023
- Physical site opened June 2024

OCC-Half Moon Bay / Coastside

- Remote services began January 2024
- Physical site opened late March 2024

The Theory of Change for these Centers leans heavily on the assumption that on-site in-center engagement will serve the most community members most effectively. It is indeed the case that, with the opening of the physical Center facilities, client volume, and thus opportunity for impact, increased with dedicated space for drop-in hours, on-site classes, cross-agency referrals, and one-on-one appointments.

It is important to note that the tables below present data as shared by JobTrain and Renaissance Entrepreneurship Center; therefore, there may be inconsistencies in how some information is presented (e.g., “Latino/Hispanic” vs. “Hispanic or Latino”). Additionally, Tables 1 and 3 report the total number of clients served by JobTrain and Renaissance, based on demographic files prepared by each site. Note that subsequent tables might have a different “N” (sample size of clients) due to missing data.

Clients Served

JobTrain’s key services include: resume development, interview practice, job placement services, career exploration, job readiness workshops, supportive services, and onsite technology access. Table 1 summarizes the total number of clients served by service category at each site.

Table 1: JobTrain Clients Served

	JobTrain Clients Served		
	EAC-SSF (7/1/21-4/30/25)	EEC-NFO (7/10/23-4/30/25)	OCC (1/1/24-4/30/25)
TOTAL Clients Served (client list: Intake Center)	1775 clients	612 clients	203 clients
Services Received (subset of TOTAL clients served) (job readiness service list)	1684 clients received job readiness services. On average, clients received 5.9 job readiness services per person (range = 1-91)	521 clients received job readiness services. On average, clients received 5.6 job readiness services per person (range = 1-27)	216 people received job readiness services. ³⁸ On average, clients received 4 job readiness services per person (range = 1-21)
Resume complete (subset of clients in Services Received above) (indicates if client is active job seeker ready for hire)	857 clients	329 clients	50 clients

See below for JobTrain’s menu of job readiness services, which are organized into three phases. Additionally, JobTrain connects clients with a range of supportive services to meet their basic needs and promote their ability to work towards career goals.

³⁸ 216 is the number of people who received job readiness services in Half Moon Bay (“Service Created Center”), based on Client ID. Above, 203 refers to the number of unique clients who *completed their intake* at Half Moon Bay.

Table 2: JobTrain Job Readiness Services³⁹

JobTrain: Job Readiness Services by Phase			
Phase 1	Phase 2	Phase 3	Supportive Services
1. First Contact 2. Intake Assessment 3. JobTrain Edge 4. Career Coaching	5. Resume Complete 6. Cover Letter 7. Job Search 8. Mock Interview 9. JobTrain Edge 10. Internal Upskill 11. Career Training Referral 12. External Upskill	13. Placement Support	✓ Food ✓ Housing ✓ Medical ✓ Mental Health ✓ Clothing ✓ Transportation ✓ Other

On the following page, Table 3 describes the total number of Renaissance clients who were served overall, in addition to the number of clients who accessed training and consultation services.

Training: Renaissance’s training program includes intensive training classes, such as Start Smart and Business Prep, in addition to skill-building workshops on topics such as marketing, finance, food business compliance, business plan development, tax preparation, QuickBooks, and early-stage childcare enterprise development.

Consulting: Renaissance clients can access customized 1:1 consulting sessions to receive guidance on a range of topics, such as: business models, registering for permits, branding, digital marketing, time management, setting growth strategies, finance and access to capital. Clients leverage these individualized sessions to deepen their learning and apply knowledge from group settings to their specific business goals.⁴⁰

³⁹ Source: Job Readiness Service Definitions. Revised 7/3/23.

⁴⁰ Q3 Coastside Renaissance Report April-June 2025

Table 3: Renaissance Entrepreneurship Center Clients Served

Renaissance Entrepreneurship Center Clients Served			
	EAC-SSF (7/1/21-4/30/25)	EEC-NFO (7/10/23-4/30/25)	OCC (1/1/24-4/30/25)
TOTAL Clients Served	416 clients	317 clients	142 clients
Training Services Received	347 clients received an average of 18hrs of training (Range: 1-136 hrs)	239 clients received an average of 18hrs of training (Range: 1-89 hrs)	135 clients received an average of 16hrs of training (Range: 1-93 hrs)
Consultation Services Received	235 clients received an average of 3.5 consultation sessions (or 4.4 hrs of consultation) (Range = 1-28 sessions or 0.5-45 hrs)	100 clients received an average of 2.2 consultation sessions (or 3.6 hrs of consultation) (Range = 1-12 sessions or 0.25-29 hrs)	40 clients received an average of 2.6 consultation sessions (or 3.4 hrs of consultation) (Range = 1-17 sessions or 0.5-37 hrs)

Client Demographics

This section summarizes client demographic information, as provided by JobTrain and Renaissance Entrepreneurship Center. Where applicable, comparisons are noted between the EACs’ client demographics and the South San Francisco, North Fair Oaks, and Half Moon Bay community demographics as a whole.

Gender

As shown below (Table 4), JobTrain clients are roughly split between male and female (with a relatively greater percentage of males at OCC, compared to EAC-SSF and EEC-NFO). However, Renaissance Entrepreneurship Center clients predominantly identify as female – at all three sites, at least 70% of clients are female, which Renaissance Center leadership shared is common across all of the sites they operate within.

Table 4: EAC Clients’ Gender

	EAC-SSF		EEC-NFO		OCC	
	JobTrain (n=1526)	Ren Center (n=405)	JobTrain (n=587)	Ren Center (n=308)	JobTrain (n=192)	Ren Center (n=138)
Female	50%	74%	51%	73%	44%	70%
Male	46%	25%	48%	26%	56%	28%

Table 4: EAC Clients' Gender

	EAC-SSF		EEC-NFO		OCC	
	JobTrain (n=1526)	Ren Center (n=405)	JobTrain (n=587)	Ren Center (n=308)	JobTrain (n=192)	Ren Center (n=138)
Transgender	–	0%	–	0%	–	1%
Decline to Answer (JT); Prefer Not to Say (REC)	3%	0%	0%	0%	0%	1%
Gender Non-Binary	0%	–	0%	–	0%	–
Queer	–	0%	–	0%	–	0%
Other	–	0%	–	0%	–	0%
# MISSING:	249	11	25	9	11	4

Race and Ethnicity

Across all three JobTrain sites, the vast majority of clients describe their ethnicity as “Hispanic or Latino,” as shown in Table 5 below. Compared to other sites, JobTrain at EAC-SSF had a relatively greater proportion of Asian participants (10%), while OCC had a relatively greater proportion of white (non-Hispanic) participants (12%).

Within all three EAC sites, there is a much larger portion of Hispanic or Latino EAC clients. For example, EAC-SSF reports 76% of clients are Hispanic or Latino (vs. 33% of South San Francisco); EEC-NFO reports 91% of clients are Hispanic or Latino (vs. 70% of North Fair Oaks); and OCC reports 85% Hispanic or Latino (compared to 30% Half Moon Bay).⁴¹ (Note that JobTrain collects a single variable for race/ethnicity (see Table 5 below), while Renaissance reported race [Table 6] and ethnicity [Table 7] separately).

⁴¹ Demographic data for SSF, NFO, and HMB is drawn from 2020 Census data.

Table 5: JobTrain Clients' Ethnicity

JobTrain Clients' Ethnicity			
	EAC-SSF (n=1591)	EEC-NFO (n=590)	OCC (n=196)
Hispanic or Latino	76%	91%	85%
Asian	10%	1%	1%
White (non-Hispanic)	8%	4%	12%
Black - African-American	3%	1%	1%
Middle Eastern or North African	1%	1%	0%
Multi-Racial	1%	1%	0%
Pacific Islander	1%	1%	0%
Decline to Answer	0%	0%	1%
American Indian/Alaskan Native	0%	0%	0%
# MISSING:	184	22	7

As shown in Table 6 below, Renaissance Entrepreneurship Center clients most commonly report their race as “Other.” The majority of clients who report their race as “Other” also report their ethnicity as Latino/Hispanic. (Renaissance clients’ ethnicity is reported in Table 7.)

As shown below, all three Renaissance EAC sites report 11% Black or African American clients, which is much higher than the Black or African American population reported by JobTrain sites (between 1-3%, see Table 5 above).

Table 6: Renaissance Entrepreneurship Center Clients' Race

Renaissance Entrepreneurship Center Clients' Race			
	EAC-SSF (n=398)	EEC-NFO (n=293)	OCC (n=120)
Other	49%	61%	50%
White	20%	16%	23%
Asian	13%	8%	5%
Black or African American	11%	11%	11%
Multiracial	3%	1%	4%
Native American or Alaska Native	2%	1%	2%
Native Hawaiian / Other Pacific Islander	1%	0%	1%
Middle Eastern	1%	0%	0%
Prefer Not to Say	1%	2%	4%
Prefer to Self-Describe	0%	0%	1%
# MISSING:	18	24	22

NOTES:

- The original question was "check-all-that-apply." Data for participants who selected more than 2 races was recoded as "multiracial."
- The vast majority (97%) of clients who described their race as "Other" also reported their ethnicity as "Latino/Hispanic."

At all three sites, the majority of Renaissance clients identify as Latino/Hispanic (see Table 7 below). Among all Renaissance clients who identify their ethnicity as "Latino/Hispanic," the vast majority identify their race as "Other" (79%), followed by white (14%), Native American or Alaska Native (2%), Black or African American (1%), Multiracial (1%), and "Prefer not to say" (1%).

As shown in Table 7 below, EEC-NFO has a relatively higher percentage of clients who identify as Latino/Hispanic than the other two sites. Over three-quarters (76%) of EEC-NFO clients identify as Latino/Hispanic, compared to 60% of EAC-SSF clients and 68% of OCC clients.

Table 7: Renaissance Entrepreneurship Center Clients' Ethnicity

Renaissance Entrepreneurship Center Clients' Ethnicity			
	EAC-SSF (n=403)	EEC-NFO (n=293)	OCC (n=138)
Latino/Hispanic - "Yes"	60%	76%	68%
Latino/Hispanic - "No"	39%	24%	30%
Prefer Not to Say	0%	0%	1%
# MISSING:	13	24	4

Age

Table 8 below shows EAC clients' average, minimum, and maximum age. It appears that OCC clients may be somewhat younger than clients at the EEC-NFO and EAC-SSF.

At the EAC-SSF and OCC, clients' median ages (listed in Table 8 below) are somewhat comparable to the median ages in their larger communities: 42 years old in South San Francisco and 47 years old in Half Moon Bay (OCC). However, clients' median age at the EEC-NFO is higher than the median age in North Fair Oaks (33 years old).

Table 8: EAC Clients' Age

	EAC-SSF		EEC-NFO		OCC	
	JobTrain (n=1567)	Ren Center (n=384)	JobTrain (n=566)	Ren Center (n=294)	JobTrain (n=171)	Ren Center (n=133)
Average Age	41	46	41	46	38	42
Minimum Age	17	20	18	20	15	18
Maximum Age	86	79	83	81	78	76
# MISSING:	208	32	46	23	32	9

Highest Level of Education Completed

Table 9 below describes JobTrain clients' highest level of education completed. The majority of clients at all three sites have a high school education or less. When comparing community-level trends to JobTrain's client demographics, it becomes clear that JobTrain explicitly focuses on supporting community members with limited formal education and high employment barriers.

Table 9: JobTrain Clients' Highest Level of Education Completed

JobTrain Clients' Highest Level of Education Completed			
	EAC-SSF (n=1208)	EEC-NFO (n=399)	OCC (n=134)
Less than a high school degree or HSE	24%	19%	41%
High School or HSE	38%	51%	31%
Some college or tech school	17%	13%	11%
Two-year degree (Associates)	6%	5%	5%
Four-year degree (Bachelors)	12%	8%	8%
Graduate degree	3%	5%	4%
PhD	0%	0%	0%
# MISSING:	567	213	69

Income Level

Table 10 (on the following page) summarizes' Renaissance clients' U.S. Department of Housing and Urban Development (HUD) income level at intake. These income limits are relevant because they often determine eligibility for affordable housing programs for residents who meet other eligibility criteria. As shown below, the vast majority of EAC clients live below 50% of the AMI in their local communities.

For reference, a living wage for two adults and two children in San Mateo County is \$46.95/hr, according to MIT's 2025 living wage calculator. This calculates to \$97,656 per year (assuming the standard full-time equivalent of 2,080 working hours per year).

Table 10: Renaissance Entrepreneurship Center Clients' HUD Income Level

Renaissance Entrepreneurship Center Clients' HUD Income Level			
HUD Income Band <i>[How HUD Income Band Would be Defined in San Mateo County in 2024 for a Family of 4]</i>	EAC-SSF (n=362)	EEC-NFO (n=284)	OCC (n=134)
Extremely Low <i>[30% of AMI - \$58,750]</i>	47%	57%	57%

Table 10: Renaissance Entrepreneurship Center Clients' HUD Income Level

Renaissance Entrepreneurship Center Clients' HUD Income Level			
HUD Income Band <i>[How HUD Income Band Would be Defined in San Mateo County in 2024 for a Family of 4]</i>	EAC-SSF (n=362)	EEC-NFO (n=284)	OCC (n=134)
Very Low <i>[50% of AMI - \$97,900]</i>	23%	25%	16%
Low <i>[80% AMI - \$156,650]</i>	12%	11%	15%
Median <i>[AMI - \$186,600]</i>	7%	3%	6%
Moderate <i>[120% AMI - \$223,900]</i>	2%	0%	1%
Above Moderate	8%	5%	5%
# MISSING:	54	33	8

English Proficiency

As shown below, the majority of clients have limited English proficiency across all three JobTrain sites. According to 2023 American Community Survey data for San Mateo County overall, 17% of residents are Limited English Proficient (LEP).⁴² While English proficiency data was not available at the community level (SSF, NFO, and Half Moon Bay), it appears that JobTrain clients have much higher rates of limited English proficiency than their surrounding community populations.

Table 11: JobTrain Clients' English Proficiency

JobTrain Clients' English Proficiency			
	EAC-SSF (n=1283)	EEC-NFO (n=558)	OCC (n=152)
Limited English proficiency	65%	65%	58%
Does NOT have limited English proficiency	35%	35%	42%
# MISSING:	492	54	51

Table 12 below describes the prevalence of monolingual Spanish speakers at each Renaissance site. However, it is important to note that the number of clients with missing data is high. Also

⁴² <https://www.smcgov.org/ceo/san-mateo-county-demographics-0>

note that this table does not include Spanish-speaking clients who can speak and understand English, but prefer to receive services in Spanish.

Table 12: Renaissance Entrepreneurship Center Monolingual Spanish Speakers

Renaissance Entrepreneurship Center: Monolingual Spanish Speakers			
	EAC-SSF (n=224)	EEC-NFO (n=193)	OCC (n=107)
Yes (Monolingual Spanish speaker)	24%	43%	49%
No	76%	57%	51%
# MISSING:	192	124	35

A significant number of EAC clients (particularly those with language barriers) are immigrants. In addition to language barriers, immigrant clients often face increased employment barriers due to language, cultural, educational, and/or legal barriers. EACs do not formally collect information on clients' immigration status.

About JobTrain Clients' Employment Status

As shown in Table 13 below, the majority of clients were unemployed at intake across all three sites, compared to just a [3% unemployment rate in San Mateo County overall in April 2025](#), reinforcing that the EACs are serving folks in need of their programming.

Table 13: JobTrain Clients' Employment Status at Intake

JobTrain Clients' Employment Status at Intake			
	EAC-SSF (n=888)	EEC-NFO (n=532)	OCC (n=111)
Unemployed	66%	68%	59%
Employed Full-Time	10%	8%	16%
Ineligible to Work	8%	0%	0%
Part-Time (20 hrs/week or more)	8%	11%	11%
Part-Time (less than 20 hrs/week)	5%	10%	11%
Not in Labor Force	2%	0%	2%
Never Employed	1%	1%	1%

Table 13: JobTrain Clients' Employment Status at Intake

JobTrain Clients' Employment Status at Intake			
	EAC-SSF (n=888)	EEC-NFO (n=532)	OCC (n=111)
Seasonal	1%	1%	1%
Employed (from ONE)	0%	0%	0%
Retired	0%	1%	0%
Self-Employed	0%	0%	0%
# MISSING:	887	80	92

See below for JobTrain clients' most recent hourly wage (Table 14). Note that a significant portion of clients' most recent hourly wage is missing (86% of EAC-SSF and 92% of OCC clients are missing hourly wage data, compared to 44% of EEC-NFO clients).

Table 14: JobTrain Clients' Most Recent Hourly Wage

JobTrain Clients' Most Recent Hourly Wage			
	EAC-SSF (n=246)	EEC-NFO (n=340)	OCC (n=16)
Average Hourly Wage	\$22.17	\$21.56	\$23.76
Median Hourly Wage	\$20.00	\$20.00	\$20.50
Minimum Hourly Wage	\$4	\$8	\$17
Maximum Hourly Wage	\$75	\$130	\$42.69
# MISSING:	1529	272	187

During intake, JobTrain requested clients' current or most recent job title. EEC-NFO was much more likely than the other two sites to record clients' current or most recent job title: at EEC-NFO, 67% of clients (409 of 612) have their current or most recent job title listed, compared to 22% of clients at OCC and 14% of EAC-SSF clients. Overall, clients' current or most recent job title is missing for 73% of clients (1883 of 2590 clients). Among clients who reported their current or most recent job titles, clients have worked in a wide range of sectors, such as: facilities and cleaning, food service, childcare and caregiving, retail and sales, transportation, healthcare, and construction.

About Renaissance Entrepreneurship Center Clients' Businesses

Table 15 below shows Renaissance clients' business status at intake. Clients are more likely to join Renaissance in the "idea" phase ("I have ideas and want to start one") at the OCC site, compared to EAC-SSF and EEC-NFO. EAC-SSF has the highest percentage of clients who already own a business and want to grow it, perhaps because the SSF site has been in operation longer than the other two sites.

Table 15: Renaissance Clients' Business Status

Renaissance Entrepreneurship Center Clients' Business Status			
	EAC-SSF (n=375)	EEC-NFO (n=279)	OCC (n=140)
I already own a business and want to grow it	37%	32%	18%
I have ideas and want to start one	30%	34%	49%
I have taken concrete steps and am committed to starting one	20%	17%	18%
I already own a business and want help sustaining it	11%	14%	11%
I already own a business and I'm here to start another business	2%	0%	1%
I do not intend to start or own a business	0%	2%	3%
# MISSING:	41	38	2

Table 16 shows clients' business stage at intake. Compared to other sites, EAC-SSF is more likely to serve clients with existing/ongoing businesses (48%) in this community with a relatively more diverse economy, while OCC is most likely to serve clients whose business is "pre-startup" in this community with a relatively narrower economy (64%).

Table 16: Renaissance Center Clients' Business Stage

Renaissance Entrepreneurship Center Clients' Business Stage			
	EAC-SSF (n=257)	EEC-NFO (n=182)	OCC (n=72)
Pre-startup	39%	47%	64%
Existing/Ongoing	48%	37%	25%
Startup	13%	15%	11%
Closed Temporarily	0%	1%	0%
# MISSING:	159	135	70

Renaissance entrepreneurs operate businesses in a wide range of industries, such as food services, beauty, cleaning and maintenance, childcare, and professional services. Within Renaissance’s dataset, approximately one-third of businesses have been assigned a North American Industry Classification System (NAICS) code (286 of 875 listed businesses, or 33%). Among these businesses (n=286), the most frequently reported NAICS codes are:

- Other Services (23%)
- Retail Trade (15%)
- Educational Services (14%)
- Accommodation and Food Services (12%)
- Health Care and Social Assistance (7%)

Community Engagement and Outreach

EAC providers continually engage in a wide range of community engagement and outreach to make sure that potential clients and employer partners are aware of and can access their services. Within this section, Head and Heart summarizes a small selection of the outreach and engagement activities that EACs have engaged in.

Partnerships with Employers to Build Workforce Pipelines

JobTrain seeks to build workforce pipelines for clients by engaging with potential employers. For example, JobTrain staff connected chip manufacturers to certified graduates from their advanced manufacturing training program.⁴³ Staff also organize Employer Spotlight Events, where a particular employer (e.g., Cintas, AbilityPath, Stangenes Manufacturing) is showcased and all Employment Specialists attend, in order to enhance staff's ability to place job seekers in suitable positions.⁴⁴ Additionally, JobTrain has organized client field trips to potential employers and led interview practice workshops in collaboration with partners such as Meta Community Hub.⁴⁵

“Through ongoing networking and outreach efforts, [JobTrain Employment Specialists] are building strong relationships with job seekers in South San Francisco and establishing meaningful connections within the broader business community.”

– **JobTrain April 2025 Progress Update**

Career Fairs

JobTrain leads various career fairs throughout the County to help connect community members to employment opportunities. These career fairs often include employers ready to interview and/or hire onsite.⁴⁶

Community Outreach Events

The EACs also lead extensive networking and outreach events to make more potential clients aware of their services. Multiple EAC partners⁴⁷ described engaging with community members, such as:

⁴³ JobTrain Progress Report - May 2025

⁴⁴ Q4 FY25 North Fair Oaks Career Center Quarterly Performance

⁴⁵ Q4 FY25 North Fair Oaks Career Center Quarterly Performance

⁴⁶ JobTrain Progress Report - May 2025

⁴⁷ Sources: JobTrain April 2025 Progress Update, CSVS Q2 2025 Progress Report

- Local elected officials, including City Council members and San Mateo County Board of Supervisors
- Youth, including high school students (e.g., Jefferson Union High School District) and members of Boys & Girls Clubs
- Adult schools (e.g., Sequoia Adult School)
- Colleges, such as College of San Mateo and Skyline College
- Attendees at large community cultural events, such as SSF Lunar New Year Night Market, NFO Festival Del Niño y la Niña, a Cinco de Mayo parade, Arab American Heritage Month celebrations, and a Día de Guadalupe Event at St. Anthony's Catholic Church
- Community spaces, such as the Half Moon Bay public library, grocery stores, and food distribution centers



OCC Fair in May 2025

Additionally, Coastside Venture Studio led multiple outreach events with subject matter experts, startups, industry leaders, business incubators, and investors.⁴⁸

To expand and deepen their impact, JobTrain also engages with diverse partner organizations with expertise in a range of areas, such as:

- Life skills training for intellectually disabled adults
- Digital equity and accessibility
- Banking – Tri Counties bank has spoken with EAC participants about topics such as banking tools, loan readiness, and small business empowerment⁴⁹

EACs also lead ongoing marketing activities, such as tabling, distributing flyers, and hosting events, as part of their lasting commitment to building partnerships and increasing community engagement.

⁴⁸ CSVS Q2 2025 Progress Report

⁴⁹ Q3 Coastside Renaissance Report April-June 2025

Accessible Facilities for the Community

Coastside Chamber makes their rooms (including a meeting room, tech room, and classroom) available to local businesses, groups, and nonprofits. Staff report that word is spreading in the community about the facility offerings – the Chamber has received increased inquiries to use the space.⁵⁰

“More than 75 people for various reasons have toured the Tech studio and have all been very complimentary on the setup and the professional quality of the equipment.”

– *Coastside Chamber Q2 2025 report*

Opportunities for Entrepreneurs to Increase their Visibility

In collaboration with JobTrain and the Coastside Chamber, Renaissance co-hosted the Coastside Community Fair, which brought together over 80 attendees, five resource partners, and five employers. Two Renaissance entrepreneurs showcased their products.

In May 2025, the Mama Bonita Marketplace featured eight Renaissance businesses. The event was designed to give the community a space to shop for meaningful gifts ahead of Mother’s Day while supporting local entrepreneurs. Vendors offered a beautiful variety of products, including hair accessories, candles, flowers, personalized cups, and other handcrafted gifts. In preparation for the event, all participating vendors received marketing, pop-up, and sales training, which helped them build confidence, refine their displays, and improve their customer engagement.⁵¹

“Cuando hay ferias, ellos agarran a toda la gente que se graduó y los ponen ahí en la feria ya a presentar su negocio. Está muy lindo.”

...

Translation:

“When there are fairs, they reach out to the graduates and put them there to present their businesses. It's really nice.”

– *Renaissance Client*

Digital Engagement

EACs practice the digital engagement and social media marketing techniques which they teach their clients. For example, the Coastside Chamber promotes all classes, events, and services through various channels. In Q2 2025, they reported, “We are currently rebranding the Coastside365 social channels and website to Coastside411 to better connect with locals.”⁵²

⁵⁰ Coastside Chamber Q2 2025 Progress Report

⁵¹ SOUTH SMC-NFO_ APR-JUNE, 2025

⁵² Coastside Chamber Q2 2025 Progress Report

Clients as Ambassadors for EAC Programming

In addition to the robust outreach efforts by EAC staff, EAC clients are spreading the word about EACs' services. Multiple Renaissance clients reported during interviews that: 1) they learned about the program from other participants, and 2) they continue to pay it forward by spreading the word and recommending classes to small business owners who could benefit from Renaissance services.

See below for a satisfied Renaissance client sharing how she spreads the word to fellow business owners in her community:

"Es genial. Todo el que me encuentro que tiene el negocio pequeño le digo hey, ¿Tú ya conoces Renaissance? ... Bueno, ahí te enseñan de tu negocio... ya mejor si tus habilidades... Han llegado gente que hacen pasteles de su casa. Uno de ellos ya abrió la pastelería.... O la mujer de raspado de la esquina de la iglesia católica ahí en South San Francisco, que está ahí vendiendo su mangonada y le digo tú eres negocio pequeño, tú eres de buscar ayuda. Aquí en esta ciudad hay ayuda para nosotros. Y así lo voy invocando a Renaissance porque la verdad es que sí es un lugar que le ayuda mucho a la ciudad."

...

Translation:

"It's great. Everyone I meet who has a small business, I say, "Hey, have you heard about Renaissance? Well, they teach you about your business... it's better if you can master your skills." ... People have come here who make cakes from their homes. One of them even opened a bakery Or the woman who sells shaved ice on the corner of the Catholic church in South San Francisco, who's there selling her mangonada (frozen dessert), and I tell her, 'You're a small business, you should look for help. There's help for us here in this city.' And so I keep invoking Renaissance because the truth is, it's a place that helps the city a lot."

– Renaissance Client

What is Working Well and Facilitators of Success

The EACs fill systems-level gaps in that they provide community members with a comprehensive and coordinated range of services to support economic advancement. Community leaders universally recognize the EACs as vital innovations that fill long standing service gaps in their respective communities. Furthermore, they offer integrated, community-specific, and culturally competent services not previously available. Prior to the establishment of the EACs, services were described as sparse, inconsistent, and often inaccessible – particularly for low-income, immigrant, and monolingual Spanish-speaking residents in addition to clients who live far from Redwood City (the County seat which has a greater concentration of social services than other areas of the County).

“The EAC really from the get-go filled significant gaps in our community... it delivered immediately.”

– *Community Leader*

“There really is nothing on the South Coast. People would take advantage of the Chamber of Commerce once in a while ... but no consistent services.”

– *Community Leader*

“The gap they [the three EACs] fill is being co-located, providing hot (not warm) handoffs directly to other community-based providers, operating with culturally competent staff, and providing a completely different type of support and environment that a City or the County of San Mateo can provide on its own.”

– *Local Workforce Development System Expert*

Community leaders also praised ways in which the EACs uphold best practices for workforce and economic development. Best practices reflected in the EACs’ model include: co-location with safety net services, in-person programming, community engagement, feedback loops, and alignment with broader policy and regulatory environments. In particular, interviewees uplift the following characteristics of the EACs:

- **“One-stop shop”:** The co-location of services with organizations that share a common purpose around economic mobility for community members most in need means people experience the EACs like a “one-stop shop.”
- **Linguistic and cultural responsiveness:** Bilingual staff hired from the local communities are often able to build trusting relationships with clients more easily than staff who are not culturally congruent with clients. **Emphasis on in-person**

“The benefit has been ... to have the opportunity to have the range of services we have access to for clients through our partnerships. It has been awesome to join forces and do something together. We all make sense together, help each other out, and also can be our own entities.”

– *Provider*

services: While clients appreciate a mix of virtual and in-person services (e.g., the ability to complete business training through Zoom), we heard that in-person services are particularly important, due to many clients' limited digital literacy and tech savviness.

- **Coordination across programs:** Communication and coordination across programs and services within each site makes for smooth operations. **Visibility for entrepreneurs:** EAC events create opportunities for entrepreneurs to sell their products and increase their visibility and engagement within their local communities.

Furthermore, these EACs uniquely offer a wide range of comprehensive, walk-in supports that are largely not available elsewhere. Multiple clients and community leaders affirmed the importance of centralized, walk-in access to a range of supports – including workforce training, small business advising, job placement, and wraparound services such as housing and legal support. As one community leader explained, “You lose people if they can’t get everything they need in one place.”

“The reason that the EAC was such an intriguing model is that it included everything from job seeking to business supports, which is extremely important – the whole picture!”

– **Community Leader**

Clients particularly benefit from being able to access personalized, individual support from EAC staff. Through the EACs, clients can access Employment Specialists (from JobTrain) and 1:1 consultation (through Renaissance) in order to navigate their own unique goals and challenges.

“Yo sé un montón de cosas nuevas que yo dije, ‘Wow, ¿Cuántos errores hubiera cometido si ellos no me hubieran orientado bien?’ Además, las profesoras son accesibles y todas las preguntas que tú haces ahí ... si en el momento no te la contestan, en privado, te la contestan. Eso es muy importante. Y otra cosa es [que] te dan atención personal porque como un grupo que tal vez sean de de 18 a 20 personas, entonces les permite hacer citas para atenderte individualmente en dónde está tu problema para no sufrir, [para] mejorar en tu negocio.”

Translation: “I know a lot of new things, and I said, ‘Wow, how many mistakes would I have made if they hadn't guided me properly?’ Plus, the teachers are accessible, and if they don't answer any questions you ask at the moment, then they answer them privately [later]. That's very important. And another thing is that they give you personal attention because, as a group of maybe 18 to 20 people, it allows them to schedule appointments to see you individually, focusing on where your problem lies, so you don't suffer, so you can improve your business.”

– **Renaissance Client**

Trust is key. The EACs successfully build trust with clients by offering culturally and linguistically responsive services for immigrant communities.

Multiple clients and community leaders emphasized the importance of culturally and linguistically responsive services. In particular, multiple clients voiced appreciation for Spanish-language classes – and this appreciation was not limited to monolingual Spanish speakers as some clients who fluidly joined interviews or focus groups in English expressed that they prefer to receive EACs’ training content in Spanish. See the client quote below:

“It is very important that people can go to the Center in their community, see people like themselves, and get multiple services in one location.”

– **Community Leader**

“The good thing for us, it was like they have classes in Spanish and in English. And that was very interesting, because it was a little hard for us to understand in the English. So it was very good that they have classes in Spanish so we can understand much better the terms we are, small business owner, like I said before.”

– **Renaissance Client**

The EACs have done an excellent job in serving community members who are most vulnerable due to historic marginalization, and thus most are in need of economic advancement. This means that clients require a high-level of investment of staff support and a diverse array of services and programmatic interventions. Many clients face intersecting barriers and injustices which can prevent them from accessing employment. As described in the spotlight below, JobTrain staff helped a client who experienced multiple barriers (such as homelessness and incarceration) to secure a job placement.

JobTrain Client Spotlight: Mr. R from North Fair Oaks⁵³

“Mr. R came to us through a referral by Mrs. Lisa Moody. He has gone through a lot in the past couple of years. He is a formerly incarcerated individual who has experienced homelessness and gone through the lengthy and tedious expungement process. He struggled to find a job for over eight months after finishing a warehouse apprenticeship program in early 2023. Even with the help of a case manager, he found today’s job market daunting, and as a person who is older and not very tech-savvy, he found it hard to stay on top of communication involving job leads and applications. We met two times that week and created a new email for job searching and communications. We landed him a good-paying job at UPS that he was happy with within that same week. Allen is very happy to be working at UPS. He has been approached with the opportunity to eventually be full-time and receive benefits and is even excited to join the union when he has the chance.”

⁵³ Q4 FY25 North Fair Oaks Career Center Quarterly Performance

The EACs respond to structural inequities by seeking to create opportunities for clients to not only generate income, but to increase their own sense of power, agency, and belonging and create assets for future generations. EACs emphasize the importance of choice, community-rooted wealth-building models, and long-term sustainability. For example, Renaissance’s Legacy Builders Initiative in SSF is empowering a new wave of entrepreneurs with the skills and knowledge needed to grow their businesses and build sustainable legacies for themselves, their families, and communities. This cohort-based program offers a comprehensive curriculum designed to support diverse business needs and help local entrepreneurs thrive in an ever-changing economic landscape.⁵⁴ Participants have gained practical skills, such as integrating AI tools into their operations, strengthening their financial literacy, navigating government contracting opportunities, and identifying new markets. Additionally, Legacy Builders participants have access to consulting sessions to dive deeper into business-specific challenges, such as pricing strategies, brand development, and funding readiness.⁵⁵

“Getting households and residents to be in the position of developing generational wealth... beyond traditional workforce development.”
– **Funder**

“Gané mejor porque es la satisfacción que sientes de que es algo tuyo. Al final del día, [si] trabajaste igual cuando se le trabaja [para] otro jefe ... pero es tuyo. Es tu resultado. Son tus ideas, son tus habilidades, las que se desarrollaron ahí. Y esa es la satisfacción más grande que uno puede tener. Cuando tiene un negocio y tiene una pasión por un negocio.”

Translation:

“I earned more because it's the satisfaction you feel knowing it's yours. At the end of the day, you worked the same way when you work for another boss... but it's yours. It's your result. It's your ideas, it's your skills, the ones you developed there. And that's the greatest satisfaction you can have. When you have a business and you have a passion for it.”

– **Renaissance Client**

Clients expressed gratitude for how “low barrier” and accessible EAC services are. Examples of a “low barrier” client experience include:

- Clients are able to talk to someone right away (with no appointment required).
- The intake process is fast.
- Clients can receive a Chromebook (if needed) to access virtual classes.
- Services are free of cost to clients.

⁵⁴ Q2 Renaissance NSMC Quarter Report Jan-Mar 2025

⁵⁵ Renaissance NSMC Quarter Reporting - Apr-Jun FY 24-25

- Staff check in with clients frequently (e.g., through phone calls and messages) to share updates, such as new training offerings.
- The EACs are welcoming to multiple generations – one client described how the benefit of working with older and younger generations goes “hand in hand,” offering experience and inspiration.

“Tienen mucha comunicación con nosotros. Tienen un grupo de WhatsApp e incluso te hacen llamadas. Es realmente fácil [acceder a las clases].”

Translation:

“They communicate a lot with us. They have a WhatsApp group and even call you. It’s really easy [to access classes].”

– Renaissance Client

Below, one client describes how valuable it was for JobTrain to remove financial barriers to her education:

“I’m a single mom, so school could be really expensive. I wasn’t looking to go to school right now at the moment, but finding out the programs that they offer and how they’re basically free, it helped me to go back. So I’m excited for that, [to do] something that I didn’t think I was going to do.”

– JobTrain Client

Below, two providers explain ways in which EACs prioritize accessibility by offering a drop-in model and having more flexible, lower-barrier-to-access eligibility criteria, compared to the Workforce Innovation and Opportunity Act (WIOA) model.

“Prior to our site in SSF, which is charged with serving North County communities, there were other services, but it was a drop-in model. Our course facilitators would drop into partner sites and offer courses. The libraries in Daly City, community centers, etc. We would do outreach at different events, but there wasn’t a place to just drop in any time and ask questions. There also isn’t the same intentional partnership with JobTrain – the referrals and relationship with JobTrain were not the same numbers as they are now in North County. It was still on the clients to find us. Now, it is like, come to the EAC, we will be there, whenever it works for you. We have never served the number of clients we are serving now in North County.”

– Provider

“It’s a great program and an excellent model. The use of funding to provide employment services to the community is very similar to the WIOA model, but they have criteria in a way that qualifies or disqualifies folks. This is more flexible. We say, ‘Come on in! We want to help you!’ We try to find what work they can do and where there are job openings that could meet their needs. The model is a good one. I worked under the WIOA contract for years and it was very restrictive, not allowing people to access services. JobTrain provides training at no cost and we can give supportive services to offset transportation costs, etc.”

– **Provider**

Additionally, clients praised how caring and supportive EAC staff are – they greatly appreciate the ways in which staff help participants to learn and take things “step by step” with patience. Clients described EAC staff as visible, well-known, and trusted among their local communities, which supports EACs’ ability to support and attract more clients.

“And I feel like they really care about you. You know, you’re not just like any other person. I feel like they really deeply care about everybody.”

– **JobTrain Client**

“[The teachers] were all so nice. And, you know, I’m not that kind of person that likes to talk... but they make you feel comfortable, and [it was a] really, really good class.”

– **Renaissance Client, Growing at Home class for childcare providers**

“JobTrain has encouraged me to work [as an older person]... to stop going out to pasture. I still have enough energy. I’m still lucid. I believe that I can go back to work for myself.”

– **JobTrain Client**

“Entonces encontraste una familia ... en Renaissance, sí encuentras la familia que necesitas para orientarte si quieres hacer un negocio.”

Translation:

“So you found a family... at Renaissance, you do find the family you need to guide you if you want to build a business.”

– **Renaissance Client**

Please see the Recommendations chapter for areas of opportunity for strengthening programming at the EACs.

VI. CLIENT-LEVEL OUTCOMES EVALUATION FINDINGS

This chapter summarizes outcome-related findings for clients served by the EACs (primarily JobTrain and Renaissance Entrepreneurship Center). Clients included job seekers, small business owners, and entrepreneurs.

Outcomes for Job Seekers

This section describes JobTrain clients' participation in job readiness services, increased job readiness skills, and job placements.

Participation in Job Readiness Services

Table 18 summarizes JobTrain clients' participation in job readiness services. The sample size ("n") in the first row of the table refers to the number of unique clients (by "Service Created Center") who received any job readiness services at all. The first row, "resume complete," indicates whether clients have completed a resume and are considered active job seekers ready for hire. The following rows list the number of unique clients (by "service created center") who received the job readiness service listed in the first column, such as "external upskill."

Table 18: JobTrain Clients' Participation in Job Readiness Services

JobTrain: Job Readiness Service Participation Count			
	EAC-SSF (n=1684)	EEC-NFO (n=521)	OCC (n=215)
Resume Complete (indicates if client is active job seeker ready for hire)	857 (51% of clients who participated in any job readiness services)	329 (63% of clients who participated in any job readiness services)	50 (23% of clients who participated in any job readiness services)
Job Search	740	304	92
Career Coaching	609	388	90
Internal Upskill	252	116	31
External Upskill	118	12	5
Placement Support	116	25	4
Career Training Referral	86	20	14
Mock Interview	62	45	4
Cover Letter	59	25	17

Job Readiness Skills

During focus groups, clients shared deep appreciation for ways that JobTrain helped them gain skills and connections to gain employment. Below are key skills that focus group participants said they learned through JobTrain:

- Learning to be proactive and communicate during job searches
- Interview preparation (e.g., learning to “structure my answers better” instead of rambling)
- Resume development
- Computer and technology training
- Job-specific training, such as advanced manufacturing, building maintenance, and medical assisting
- Support with cover letters and reference

“I worked very closely with [JobTrain staff] – she was wonderful, helped me prep for interviews and know what to say and what not to say. We have to be proactive, we have to be one on one, we need to reach out – we need to be there.”

– **JobTrain Client**

Additionally, JobTrain supported clients to:

- Transition to another field due to market changes or temporary disability
- Access unemployment benefits
- Access practical support, like non-slip shoes, Clipper cards, gift cards, or a used bike for transportation to work
- Prepare for opportunities to acquire certifications

“I would not have been able to get my unemployment benefits without the assistance of [JobTrain staff]. I was floored by the wonderful support I got from both of them. It was very difficult to do online.”

– **JobTrain Client**

See below for a client’s testimonial about how finding a job has helped her increase her happiness and self-esteem:

“Estoy muy contenta porque me siento que estoy haciendo algo útil.... La verdad, me han ayudado mucho. Pues, finalmente encontré trabajo gracias al nuevo currículum que me ayudaron a hacer.... Se los agradezco mucho porque me salvaron mi forma de ser porque yo sentía que no servía para nada, que nunca iba a encontrar trabajo. Ahora siento bien importante que puedo hacer cualquier cosa.”

Translation:

“I’m very happy because I feel like I’m doing something useful... Honestly, they’ve helped me a lot. Well, I finally found a job thanks to the new resume they helped me create... I’m so grateful to them because they saved my way of being, because I felt like I was useless, like I’d never find a job. Now I feel really important and can do anything.”

– **JobTrain Client**

During a focus group, a JobTrain participant shared his very positive experience in the Advanced Manufacturing course:

“I recently took the Advanced Manufacturing course at JobTrain, and that was a very positive experience, in my opinion. It was two weeks of intense training; we came here from 9:30AM every morning for two weeks, and went until 4PM. They provided us with computers, with breakfast, with lunch, and ... I got taught different skills in [different] ideas and topics. They even helped me with resume building. So it was a very comprehensive course.”

– *JobTrain Client*

This two-week Advanced Manufacturing workshop (offered in partnership with the Semi Foundation) allowed students to gain skills and training in the semi-conductor field for Fabricator, Technician, and Machinist jobs. JobTrain provided breakfast and lunch while students received a \$500 stipend upon completion.⁵⁶ See image below, which features 14 of the 17 participants from Spring 2025:



Job Placement

Across all three JobTrain sites, clients received a total of 778 job placements. See below for the number of placements and number of clients by site (note that some clients received multiple placements at different points in time).

- **EAC-SSF: 533 job placements** among **452 EAC-SSF clients** who received placements
- **EEC-NFO: 185 job placements** among **159 EEC-NFO clients** who received placements
- **OCC: 60 job placements** among **52 OCC clients** who received placements

The following three tables show clients’ job placement hourly wage (typically around \$22/hr), their job placements’ average hours per week (typically around 35hrs/week), and job placement position type (the vast majority is “regular”). The sample sizes (“n’s”) in the three tables below

⁵⁶ JobTrain Progress Report - April 2025

refer to the *number of job placements*, not the number of individuals who received job placements.

Table 19: JobTrain Clients' Job Placement Hourly Wage

JobTrain Clients' Job Placements: Hourly Wage			
	EAC-SSF (n=530)	EEC-NFO (n=182)	OCC (n=55)
Average Hourly Wage	\$22.73	\$21.84	\$21.92
Median Hourly Wage	\$21.25	\$20.13	\$20.00
Minimum Hourly Wage	\$15	\$16	\$16
Maximum Hourly Wage	\$81.73	\$64	\$53.85

Table 20: JobTrain Clients' Job Placement Average Hours Per Week

JobTrain Clients' Job Placements: Average Hours Per Week			
	EAC-SSF (n=467)	EEC-NFO (n=181)	OCC (n=57)
Average Hours Per Week	36.2	34.4	35.1
Minimum Hours Per Week	7	6	15
Maximum Hours Per Week	45	80	48

Table 21: JobTrain Clients' Job Placement Position Type

JobTrain Clients' Job Placements: Position Type			
	EAC-SSF (n=469)	EEC-NFO (n=174)	OCC (n=58)
Regular	90%	80%	93%
Temporary	5%	16%	7%
Self-employed	4%	3%	0%
Internship	1%	0%	0%
Promotion	0%	1%	0%

In the quotes below, JobTrain clients describe positive changes they've experienced since finding a job:

In Clients' Own Words:

What difference has JobTrain made in clients' lives by helping them find work?

"Everything that I've accomplished is because of JobTrain.... [without them, I would] likely still be in the street. I wouldn't have found this amazing job here at [employer] as [executive sous chef]. Transportation, clothing, vouchers for food, even counseling. Just them being friendly... receiving me with open arms and asking how's my day going, how's my child, things like that. It's more than I could have asked for."

....

"JobTrain helped me find this job... and I'm making double. Hell yeah, it's greatly increased my salary, and I'm extremely thankful for that."

...

"Now, I'm working with the County. I have health insurance.... I have a steady job, a good salary, and I can provide to my family."

Additionally, below are JobTrain client spotlights on job placement successes of two clients.

JobTrain Client Spotlight: Wallace from South San Francisco⁵⁷

"After being laid off from his job at a law firm and running out of his EDD benefits, Wallace found himself struggling to make ends meet, burdened by bills and growing credit card debt. In desperate need, he made a commitment to meet with Edmund Lee by making weekly appointments, receiving career coaching, and diligently following up with employers after submitting job applications. Wallace's perseverance paid off and just one month into his job search, Wallace landed a position as an office administrator at SFID Design Build, an interior design company."

JobTrain Client Spotlight: Ms. M from North Fair Oaks⁵⁸

"Ms. M came to us initially interested in taking the IT class to further her earning potential. She had been working as a case manager at a housing Nonprofit in Palo Alto but was looking for something closer to home to work and help the members of her community. She also wanted more flexibility to return to her studies at San Jose State University. We helped her edit and update her resume and supplied her with the new skills and tips that would be helpful for her to continue her job search and for future use. When we sent her the case manager lead at our partners at El Concilio, she was excited and hopeful. She applied for a cover letter for a

⁵⁷ JobTrain Progress Report - April 2025

⁵⁸ Q4 FY25 North Fair Oaks Career Center Quarterly Performance

couple of different jobs. After several interviews, she received two offers, which she said had never happened before. Hence, she needed some placement support, so she sat with our team to go over her options and help her draft an acceptance email and a polite rejection email. She was ecstatic to start at El Concilio in early November and has hit the ground running! We have run into her in the community a couple of times at the local coffee shop, and when we have gone to drop off flyers and inform our partners of any new updates and workshops, she is still over the moon almost two months after starting. She loves that she gets to walk to work every morning and help her community. She also really enjoys the people she works with and their support.”

Outcomes for Small Business Owners and Entrepreneurs

Renaissance Entrepreneurship Center provides a cornerstone for entrepreneurial activity, delivering essential resources to help business owners start, stabilize, and scale their enterprises. As San Mateo County communities navigate the lasting impacts of the pandemic, Renaissance seeks to promote equitable access to knowledge, networks, and opportunities that foster long-term financial resilience.⁵⁹

The available quantitative data related to Renaissance’s outcomes is limited for multiple reasons. First, Head and Heart received minimal (and incomplete) information about Renaissance clients’ businesses’ finances and staffing. Renaissance administers quarterly surveys to clients asking about information such as gross revenue and staffing; however, clients’ quarterly survey response rates are low (around ~10%). Secondly, this formative evaluation happened early in the lifecycle of the EACs, and it can often take up to three years for small businesses to hit their stride. Thus, some of Renaissance’s potential impacts may not yet have occurred, particularly for clients served in the more recently opened EACs in North Fair Oaks (EEC-NFO) and Half Moon Bay (OCC).

The above notwithstanding, based on the data from client interviews and Renaissance’s quarterly reports, it is clear that Renaissance is contributing towards positive impacts for clients, their businesses, their families, and their larger communities. Through Renaissance, clients successfully gained access to myriad training and consulting services to strengthen their businesses.



*Renaissance Business Prep Class (SSF),
Graduation 2024*

⁵⁹ Renaissance NSMC Quarter Reporting - Apr-Jun FY 24-25

Below is a selection of the types of training and workshops that they received:

- **Small business intensive training classes, such as:**
 - Start Smart
 - Business Prep
- **Skill-building workshops on topics, such as:**
 - Marketing (e.g. social networks, Canva, and digital marketing)
 - Business websites
 - Finance
 - Legal and regulations
 - “Soft” business skills
 - Business plan development
 - Starting a home kitchen business
 - Canva and graphic designPricing products and services
 - Building your business credit
 - Creating pop-up displays
 - Vision and mindset **Industry-specific workshop for childcare businesses**
- **Customized one-on-one consulting**
- **Access to capital, markets, and networking**

One of Renaissance’s signature programs is Start Smart/Comienza con Confianza, a four-week class which guides aspiring entrepreneurs through the foundational steps of launching a business. Participants define their vision, craft a clear mission statement, assess their skills and available resources, and develop a tailored business strategy. The program also includes practical exercises to test products and services, helping entrepreneurs validate their ideas and build a strong roadmap for success.⁶⁰ See below for a Client Spotlight about how one Renaissance participant is using these learnings to turn her cooking talents into a business.

⁶⁰ Q2 Renaissance NSMC Quarter Report Jan-Mar 2025

Renaissance Client Spotlight: Sandra Zeledón⁶¹

“Sandra Zeledón, a proud mother of three and keeper of her Nicaraguan household traditions, is embracing a new chapter as she turns her lifelong passion for cooking into a business. With her children now grown, Sandra feels ready to take on something that both challenges and enriches her life. After hearing about Renaissance from friends, she joined our orientation eager to learn. She quickly enrolled in Comienza con Confianza, our foundational Spanish-language course designed to help entrepreneurs bring their ideas to life through the Business Model Canvas. In this course, Sandra identified her target clients, value proposition, startup needs, and revenue streams, laying the groundwork for her future business.

Today, Sandra is continuing her journey alongside her two daughters in Plan de Negocios, our Spanish-language business planning course. Her daughters bring valuable experience from working in local restaurants, and together they make a passionate team committed to building a mission-driven business that enriches both their lives and their community.

Sandra’s vision is to add to North San Mateo County’s rich culinary landscape with food that tastes like home away from home, where the heart of Nicaragua comes through in every bite. More than a business, it is her way of honoring her culture, sharing her story, and creating a table where everyone is welcome.”

Business Outcomes Reported by Clients in Quarterly Surveys

To learn more about clients’ outcomes, Renaissance administers quarterly surveys to clients about their business growth, profit/loss, and number of employees. Overall, the volume of quarterly responses is low; still, responses received indicate that entrepreneurs have benefitted from Renaissance services.

Table 22 below summarizes the number of clients who grew their business in any quarter (by site) and the number of unique clients who launched their business in any quarter.

Table 22: Quarterly Survey Respondents’ Reported Business Growth and Business Launch

Renaissance Entrepreneurship Center: Business Growth and Business Launch			
	EAC-SSF (n=34 unique respondents)	EEC-NFO (n=29 unique respondents)	OCC (n=11 unique respondents)
Number of unique clients who reported they grew their business (in any quarterly survey)	13	19	2

⁶¹ Q2 Renaissance NSMC Quarter Report Jan-Mar 2025

Table 22: Quarterly Survey Respondents' Reported Business Growth and Business Launch

Renaissance Entrepreneurship Center: Business Growth and Business Launch			
	EAC-SSF (n=34 unique respondents)	EEC-NFO (n=29 unique respondents)	OCC (n=11 unique respondents)
Number of unique clients who reported they launched their business (in any quarterly survey)	9	3	5

Table 23 describes how many Renaissance clients 1) improved their pre-existing website and 2) launched a new website.

Table 23: Quarterly Survey Respondents' Website Improvement and Website Launch

Renaissance Entrepreneurship Center: Website Improvement and Website Launch			
	EAC-SSF (n=34 unique respondents)	EEC-NFO (n=29 unique respondents)	OCC (n=11 unique respondents)
Number of unique clients who reported they improved their pre-existing website (in any quarterly survey)	12	9	2
Number of unique clients who reported they launched a new website (in any quarterly survey)	7	3	4

Table 24 summarizes several indicators of businesses' overall health: their gross revenue/sales, profits/losses, number of employees, and level of personal investment. These indicators reflect some of these businesses' contributions to their local economies and local communities.

Table 24: Quarterly Survey Respondents' Revenue, Profits, Employees, and Investments

Renaissance Entrepreneurship Center: Revenue, Profits, Employees, and Investments				
		EAC-SSF	EEC-NFO	OCC
Gross Revenue/Sales (Quarterly)	Total gross revenue reported: \$539,181. 33 survey responses (among 26 unique clients) reported gross revenue/sales > 0. Among these 33 responses: Average = \$16,339 Range = \$1-120,000 Median = \$3000	Total gross revenue reported: \$437,521. 25 survey responses (among 19 unique clients) reported gross revenue/sales > 0. Among these 25 responses: Average = \$17,501 Range = \$774-100,000 Median = \$8000	Total gross revenue reported: \$15,935. 6 survey responses (among 5 unique clients) reported gross revenue/sales > 0. Among these 6 responses: Average = \$2,656 Range = \$400-7000 Median = \$975	
	Net profit: \$97,720. 23 survey responses reported profit > 0. Total profit: \$107,920. Three survey responses reported losses (profit < 0). Total losses: \$10,200. Among these 26 survey responses reporting profit or loss (not equal to zero): Average = \$3758 Range = \$8000 loss (min) to \$33,000 profit Median = \$1775	Net profit: \$93,656. 19 survey responses (among 17 unique clients) reported profit > 0. Total profit: \$94,856. One client reported a \$1200 loss. Among 20 survey responses reporting either a profit or loss (not equal to zero): Average = \$4683 Range = \$1200 loss (min) to \$27,000 profit Median = \$2250	Net profit: \$3,371. Four survey responses (among 3 unique clients) reported profit > 0. Total profit: \$3371. No clients reported losses. Among these 4 responses reporting a profit: Average = \$843. Range = \$65-\$2206 Median = \$550	
Profit / Losses	Number of Part-Time Employees	7 responses (among 7 unique respondents) indicated they have at least 1 part-time employee. Total: 10 part-time employees. Average = 1.4 part-time employees Range = 1-3 part-time employees Median = 1	9 responses (among 8 unique respondents) indicated they have at least 1 part-time employee. Total: 13 part-time employees. Average = 1.4 part-time employees Range = 1-3 Median = 1	Two responses (among 2 unique respondents) indicated they have at least 1 part-time employee. Total: 3 part-time employees. Average = 1.5 part-time employees Range = 1-2 Median = 1.5
	Number of Part-Time Employees	7 responses (among 7 unique respondents) indicated they have at least 1 part-time employee. Total: 10 part-time employees. Average = 1.4 part-time employees Range = 1-3 part-time employees Median = 1	9 responses (among 8 unique respondents) indicated they have at least 1 part-time employee. Total: 13 part-time employees. Average = 1.4 part-time employees Range = 1-3 Median = 1	Two responses (among 2 unique respondents) indicated they have at least 1 part-time employee. Total: 3 part-time employees. Average = 1.5 part-time employees Range = 1-2 Median = 1.5

Table 24: Quarterly Survey Respondents' Revenue, Profits, Employees, and Investments

Renaissance Entrepreneurship Center: Revenue, Profits, Employees, and Investments			
	EAC-SSF	EEC-NFO	OCC
Number of Full-Time Employees	<p>9 responses (among 9 unique respondents) indicated they have at least 1 full-time employee (FTE). Total: 10 full-time employees.</p> <p>Average = 1.1 full-time employees Range = 1-2 Median = 1</p>	<p>8 responses (among 8 unique respondents) indicated they have at least 1 full-time employee (FTE). Total: 9 full-time employees.</p> <p>Average = 1.1 full-time employees Range = 1-2 Median = 1</p>	<p>Two responses (among 2 unique respondents) indicated they have 1 full-time employee. Total: 2 full-time employees.</p>
Amount You Invested in Your Business	<p>Total invested: \$340,311.</p> <p>32 responses (among 26 unique respondents) indicate that they have invested (more than \$0) toward their business.</p> <p>Among 32 responses: Average = \$10,635 Range = \$200-\$99,999 Median = \$2750</p>	<p>Total invested: \$258,200.</p> <p>28 responses (among 22 unique respondents) indicate that they have invested (more than \$0) toward their business.</p> <p>Among 28 responses: Average = \$9221 Range = \$200-99,999.99 Median = \$1750</p>	<p>Total invested: \$24,679.</p> <p>13 responses (among 9 unique respondents) indicate that they have invested (more than \$0) toward their business.</p> <p>Among 13 responses: Average = \$1898 Range = \$140-5000 Median = \$1500</p>

Themes from Renaissance Client Interviews

As part of this formative evaluation, nine Renaissance clients were interviewed about their experiences with the program. Clients shared overwhelmingly positive feedback, and they reported that they made impactful changes to their business practices as a result of what they learned. Below are some key examples and highlights.

Multiple clients obtained business licenses thanks to working with Renaissance. Before Renaissance, many clients did not understand the process and steps needed to obtain a business license. Staff helped clients to resolve their questions and address challenges related to obtaining a license.

Renaissance helped many clients to expand their businesses through improved online and physical marketing.

- One client who owns a cleaning business described how Renaissance taught him to market his services in multiple ways – he learned to set up a Google page, create and distribute flyers, engage in social media marketing, and even how to take photos that

best showcase the quality of his work. This client emphasized that Renaissance staff “saben de lo que están hablando” (know what they are talking about) – “cuando uno lo implementa, sí ve un cambio” (when you implement it, you do see a change). Before, this client paid someone else to manage his social media pages, and now, the client manages his social media marketing himself with better results.

- Another client described how improved marketing has brought increased customers to her coffee shop – marketing was the “number one thing” where she “saw a difference” in helping attract more customers. The client shared that she learned how to look at her business “from the other side” (customers’ perspective) to improve her marketing – “Are the pictures clear to customers? Better quality pictures help the customer see the business as more attractive.” She estimates that her revenue increased by ~10% after working with Renaissance.
- According to an entrepreneur who owns a small jewelry business: her improved social media strategies helped increase her jewelry sales by about 40%.
- For entrepreneur Aracelly Picado, Renaissance staff helped her improve her marketing and create a Youtube video ([Renaissance celebrates Aracelly Picado - Cacao Nicoya](#)) which shares the story of her business. Cacao Nicoya’s unique value proposition includes selling meals to workers at construction sites – unlike fast food establishments, she offers a variety of hot, homemade foods, such as tilapia, Nicaraguan “gallo pinto” (red beans and rice), plantains, and champurrado (a hot beverage made with corn and chocolate).

See below for a Client Spotlight about how Renaissance helped one client to showcase her custom bridal and dress alteration business.

Renaissance Client Spotlight: Mary Obico Velasco⁶²

“Mary Obico Velasco is the creative force behind Mary O Maker, a custom bridal and dress alteration business dedicated to helping clients look and feel their best on their most special occasions. With a keen eye for detail and a passion for design, Mary transforms gowns and garments into perfectly tailored pieces, delivering craftsmanship and confidence to her clients.

After participating in a 10-week Business Prep course, Mary refined her vision for Mary O Maker and built a more precise roadmap for growth. She also participated in Renaissance’s Website Program, where she worked one-on-one with experts to develop a beautiful and functional website: www.maryomaker.com. The new site showcases her services, highlights her portfolio, and makes it easier for clients to connect with her directly. Additionally, Mary has participated in a wide range of ongoing learning opportunities to strengthen her visibility, protect her business, improve customer engagement, and promote client retention.”

⁶² Renaissance NSMC Quarter Reporting - Apr-Jun FY 24-25. NOTE: This spotlight is shortened – the success story in the quarterly report contains more detail.

Renaissance supported clients to formalize their businesses in various ways, such as using contracts and paying payroll taxes. For example, one client who is a childcare provider shared that Renaissance taught her about the importance of formalizing her agreements with families via contracts. As a result of what she learned, she now uses contracts which articulate policies such as drop-off and pick-up times, sick policies (to avoid spreading illness among children), and holiday and vacation pay. Another client shared that, after working with Renaissance, he was able to increase his business revenue enough to take on the increased expenses of formalizing his business, such as paying for payroll taxes and insurance.

Renaissance clients learned how to improve their businesses' financial health and organization. Clients described how Renaissance helped them learn how to understand profit and loss, create a budget, and save money for taxes. As one client described, "everything you earn isn't for you" – and Renaissance taught him to set aside money to meet his goals.

Additionally, some clients shared how they learned to adjust prices to increase the profitability of their businesses. For example, one client described raising her rates because she had been undercharging. However, another client talked about how he learned to lower his prices (during slower times) for his business's financial health. In periods of lower demand, he learned to respond by offering "specials" or lower prices on the plants he sold – even if there wouldn't be a profit, he could recoup some money so that there wouldn't be a loss. Increasing his sales during the slower months helped increase his overall revenue. The owner of this plant business estimates he increased his revenue by ~5-10%.

See below for testimonies from two food-related entrepreneurs about how Renaissance helped them increase their businesses' financial health. The first testimony below also explains how Renaissance helps entrepreneurs to learn about food safety.

"Me ayudaron mucho a poner nombre a los platos, a los precios de los platos, porque como no sabes... tú tienes ganas de hacer un negocio, pero ¿Qué precio le pones al plato de comida? ¿Cuánto es lo que inviertes? ¿Cuánto es la ganancia?"

"Otra cosa que aprendimos es lo que no debemos de vender en la calle. Por ejemplo, los mariscos, no puede vender cosas como leche que se pueden arruinar ya mientras no tuvo un refrigerador."

Translation:

"They helped me a lot with naming and pricing dishes, because you don't know what you're looking for, and you want to make a business out of it. But what price do you put on a plate of food? How much do you invest? How much is the profit?"

"Another thing we learned is what we shouldn't sell on the street. For example, things like milk and seafood can't be sold, which can spoil if you don't have a refrigerator."

– Renaissance Client

“To be honest, my experience with Renaissance was great. I learned a lot, and the way that some of the things I was doing in my business weren't exactly accurate. I did have to check my profits and losses. I made sure my website was up to date. I added different kinds of pictures. They also helped us out to get more people to come into the bakery.”

– *Renaissance Client*

Clients gained value through networking and community-building in Renaissance programming. They shared that it was beneficial to meet and learn from other business owners. See below for a testimony from a client who enjoyed learning from other entrepreneurs' class presentations:

“Y después, al final de cada curso, tú tienes que presentar un ejemplo o un algo que tú aprendiste y cómo lo puedes interpretar a los demás. Eso es muy bonito porque entre todos vemos las cualidades, las habilidades diferentes que cada uno tiene, todos nos apoyamos. Fue fantástico.”

Translation:

“And then, at the end of each course, you have to present an example or something you learned and how you can explain it to others. That's really nice because together we see the qualities, the different skills each of us has, and we all support each other. It was fantastic.”

– *Renaissance Client*

The group learning environment also helped clients feel accountable to make progress. As one client described: “When I was taking the class, they kept me accountable for the things. Like, it was a group of us each week, so I felt like the homework that they did give us, it made me make sure I did it. Like it held me accountable.”

Thanks to Renaissance, clients had support in navigating and bouncing back from challenges. For example, Coastside staff supported a client who had fallen victim to a scam involving a fraudulent Small Business Administration (SBA) representative. With support from staff, the client reported the incident, regained confidence, and re-started her efforts to seek funding to enhance her daycare business. The client later applied for and was awarded a \$1000 grant from Renaissance, which will support program improvement (e.g., expanding outdoor play options) while making her business more competitive among local childcare providers.⁶³ (Note that all participants in the Growing at Home (Creciendo en el Hogar) for childcare business owners are eligible to apply for a \$1000 grant to strengthen and grow their operations.⁶⁴ Through interviews and EAC quarterly reports, Head and Heart also learned that Growing at Home clients received grants to purchase critical items such as a fridge and air conditioning for their businesses.)

⁶³ Q3 Coastside Renaissance Report April-June 2025

⁶⁴ Renaissance NSMC Quarter Reporting - Apr-Jun FY 24-25

As another example, the Beyond the Kitchen program supports clients in navigating a wide array of industry challenges, including kitchen operations, sustainability, compliance, licensing, and scaling from home kitchens to commercial spaces. Moving forward, the program will focus on strengthening partnerships and resources to help more food businesses formalize and scale, advancing Renaissance’s mission to create inclusive and sustainable economic opportunities through food entrepreneurship.⁶⁵

Finally, multiple clients shared ways that they created “ripple effects” within their local communities after completing Renaissance programs. Clients encouraged other small business owners to formalize their business and seek training and/or consultation from Renaissance. And in fact, multiple clients interviewed shared that they learned about Renaissance from other entrepreneurs in their community.

Clients also inspired their loved ones (including their children and/or employees) to start their own small businesses, or in some cases, they took Renaissance classes together with their loved ones to work on their shared small business. One client shared how her young children were inspired by watching her entrepreneurship journey and started businesses themselves – her young daughter started selling products to young people (such as glitter slime which she makes herself), while her son started selling lemonade (which he labels and bottles himself) with a temporary food license.

Lastly, Renaissance also helped clients to form more relationships within their community. Clients increased their visibility and engagement within the community by attending local events (such as pop-up markets) and meeting other entrepreneurs. One client (who creates custom artwork) shared happily that he had gained a local government client, which had been a long-time goal of his, as a result of his increased visibility.

⁶⁵ Renaissance NSMC Quarter Reporting - Apr-Jun FY 24-25

VII. COMMUNITY-LEVEL OUTCOMES AND IMPACTS OF THE EACs

This chapter discusses community-level outcomes, implications of the service population for the Centers' delivery model and the associated cost of serving the population effectively, and potential cost-savings to public agencies per client experiencing outcomes.

Community-Level Outcomes

Community leaders and subject matter experts described how the EACs are strengthening resilience and economic mobility among marginalized community members. They described tangible results from EAC programming, such as:

- Entrepreneurs launching food trucks and pop-up shops
 - Job seekers receiving digital literacy and employment support
 - Community members connecting to mental health, childcare, and legal services
- Furthermore, the EACs contribute to building a resilient and diverse business ecosystem by promoting equitable access to resources such as capital, mentorship, and technology.

Below are examples of ways that the OCC promotes local economic growth:

- The co-location of [Coastside Venture Studio](#) (CSVS) at the OCC is an intentional strategy to diversify the local economy, creating new industry and job opportunities harnessing the unique natural assets of the Coastside community. CSVS benefits the coastside economy by fostering startups dedicated to solving urgent resiliency challenges in a changing world. It is the only incubator-through-accelerator program in the nation dedicated entirely to resiliency tech or "res-tech."⁶⁶ In mid-2025, CSVS reported that multiple companies were considering and/or recently signed agreements to join CSVS; these companies bring expertise in a range of innovative areas such as: mushroom mycelium for building materials; low-cost seabed robotics for critical minerals; AI water assessment; and eDNA to monitor the impact of animals, fungi, plants and bacteria on land or in water.⁶⁷ It is hoped that some of the job opportunities created by businesses incubated by CSVS will provide meaningful employment for clients of the OCC.
- The [Coastside Business Resource Center](#), a program of the Coastside Chamber, helps catalyze business growth with the Coastside by offering businesses a wide range of workshops, one-on-one consulting, and opportunities to participate in business cohorts. Co-located with the OCC, the Chamber plays an important and central connective role at the Center – an aspect of the OCC that differentiates its model from that of the EAC-SSF and the EEC-NFO.

⁶⁶ <https://csvs.energysociety.org/about-csvs.html>

⁶⁷ CSVS Q2 2025 Progress Report

Furthermore, the EACs fill historic gaps in services and challenges to access. Before the establishment of the EACs, residents in all three communities—South San Francisco, the Coastside, and North Fair Oaks—faced systemic challenges in accessing workforce and small business support services. Services were either non-existent or scattered, difficult to access without transportation, or not designed to support high-barrier, low-income and immigrant communities.

The EACs contribute uniquely to local economies by offering co-located, community-centered, and culturally competent services. Their physical presence in neighborhoods, emphasis on collaboration, and client-centered models are distinct advantages. Providers described ways in which the EACs have helped families access multiple forms of support and develop a plan to reach their economic and career goals.

“There is a clear recognition that this was needed and it is a relief that it does exist now because there is somewhere to send folks who need this support.”
– **Funder**

“In August, we had a family come in that recently arrived from Mexico. They arrived documented with work permits. A mom, father, and two teenagers who had studied in their country and wanted to continue their education, but didn’t realize it wouldn’t be exactly the same. They had to take some classes over and were OK with taking jobs in the interim. One of them wants to be a doctor. They have met with the College of San Mateo (CSM) to figure out what they need to do. We told them when to come to talk to CSM and learn what classes they need to take for Pre-med and 4-year college. We hooked them up with a counselor and easily could make the connections to the different needs they had.”
– **Provider**



Implications of Service Population for the Delivery Model and Cost Associated with Effectively Serving the Population

Fundamental to assessing the impact of the EACs is taking stock of the population that the Centers serve and considering the implications for the program model and associated expenses related to delivering the model effectively. By all measures, the EACs reach and engage the segments of San Mateo County with the highest barriers to employment and economic advancement opportunities. High percentages of job-seeking clients have limited English proficiency (between 58% of OCC clients and 65% of both EAC-SSF and EEC-NFO clients), are

unemployed at intake (59% of OCC clients, 66% of EAC-SFF clients, and 68% of EEC-NFO clients), and have only completed high school, high school equivalent, or less than high school high school education (62% of EAC-SFF clients, 70% of EEC-NFO clients, and 72% of OCC clients). Similarly, the vast majority (92% of EAC-SSF clients, 95% of EEC-NFO clients, and 95% of OCC clients) of entrepreneurs seeking assistance starting, sustaining, or building their small businesses report their household income as extremely low to moderate under the HUD income bands, meaning their income is 120% AMI or less. Reflective of the larger community, the residents of which primarily identify as people of color, the EACs serve primarily people of color clients with only 4-12% of JobTrain clients at the three EACs identifying as non-Hispanic white.

Effectively achieving economic-related outcomes – increasing personal and family income from jobs and small business entrepreneurship – with high-barrier clients requires the type of robust, wraparound, low-barrier program model that these Centers provide. Personal and family economic precarity can become a vicious cycle for community members struggling with meeting basic needs (including food and shelter) and access to the type of functioning technology that today's job-search and business environments require. By offering the array of services that the EAC clients need to meet basic needs, build digital literacy and acquire access to technology, and upskill in employment and entrepreneurship capacities, these Centers give program participants a reasonable chance of economic advancement.

Of course, the more intensive the program model, the greater the expense is to deliver it. Serving this highest-barrier segment of the community with employment, entrepreneurship, and other economic opportunity services, together with wraparound services, indeed results in a costly model at face value. A rudimentary per-participant cost of running each of the three EACs, based on hard annual operating costs (excluding in-kind services) provided by each of the three Centers, results in the following:

- The per-participant cost of operating the **EAC-SSF** is around **\$2,500** per client;
- The per-participant cost of operating the **EEC-NFO** is around **\$3,600** per client; and
- The per-participant cost of operating the **OCC** is around **\$4,000** per client.

This analysis is based on dividing the annual operating costs of each Center by the average count of clients for a single 12-month period. Because the operating cost figures used for this calculation do not include in-kind services, these per-client costs estimates are likely slight over-estimates.

While the annual operating cost of each of the three Centers is quite comparable, variations in per-participant cost are accounted for by the number of clients served each year, with the EAC-SSF and EEC-NFO serving relatively larger numbers of clients per year than the OCC (as they are also relatively larger communities and have been in operation longer than the OCC).

Comparing these per-participant costs to industry benchmarks is instructive. Pulling out relevant comparisons from the research and analysis conducted for this study ([summarized here](#)), the \$2,500-\$4,000 per-participant costs of these three Centers is on the low end of the typical range of \$2,000 to \$10,000 per-participant cost of federal WIOA (Workforce Innovation and Opportunity Act) workforce development programs as well as the typical range of \$3,000 to \$12,000 per participant for programs funded by local and national philanthropic organizations (with variations depending on the provision of wraparound services like career coaching, transportation, and childcare). Additionally, the per-participant cost of serving clients at these Centers is significantly less than the range of \$10,000 to \$30,000 per participant, depending on program intensity, reported as typical for community-based workforce programs by the California Workforce Development Board.

Potential Cost Savings to Public Agencies Per Client Experiencing Outcome

Communities benefit greatly, in many ways, from residents' participation in the labor market and economy through entrepreneurship. These benefits include greater purchasing, local spending power, and local economic multiplier effects; community members employed; increased tax revenue; increased retail vibrancy and service availability; reduced stress among community members and other community protective factors including enhanced social cohesion, civic participation, and potential community stabilization; and reduced public expenditures. While the scope of this formative evaluation was unable to explore all of these benefits of the EACs, taking this first step on an impact evaluation journey positions these EACs to be able to undertake a broader and deeper study that could consider this range of potential impacts in 2-3 years from now, particularly if client-level data collection is enhanced in ways discussed in the Recommendations chapter below.

"Aumenté mis ingresos. Sí, pero ahora pagamos payroll, ahora pagamos aseguranzas, ahora tenemos otros tipos de gastos. Yo podría decir que pues sigo ... sigo igual, pero ahora con una con un negocio establecido real."

Translation: "Yes, I increased my income. But now we pay payroll [taxes], now we pay insurance, now we have other types of expenses. I could say that I'm still... still the same [income-wise], but now with a real, established business."

– *Renaissance Client*

The above notwithstanding, Head and Heart conducted research in the categories of potential governmental cost savings that these EACs could be contributing to their communities and to federal funding sources. Specifically, this study explored potential savings in public benefits costs (CalFresh, Medi-Cal, General Assistance, housing assistance, and Unemployment Insurance) resulting from a client who was unemployed at the time of intake at the EAC-SSF and then got a job earning \$22/hour. This study found a total estimated cost savings of \$20,000 to \$60,000 per year per person, depending on previous use of public assistance and experience

of risk factors. For a detailed explanation of how these cost-saving estimates were calculated, please refer to Appendix G. While the \$20,000-\$60,000 cost-savings range per person over-estimates cost savings to San Mateo County specifically, it does speak powerfully to the overall potential savings in public benefits costs at multiple levels of government from local to state to federal.

Moreover, the high-need, economically precarious population served by these three EACs could be, and very well could likely be, at high risk of homelessness given the extremely high cost of housing in San Mateo County coupled with the dearth of affordable housing. A single person experiencing homelessness imposes significant financial costs on local governments (often far exceeding the cost of providing housing). Based on national and regional research—and with extrapolations specific to San Mateo County—the implications can be summarized as follows:

Estimated Annual Cost per Person Experiencing Homelessness

National and California-based studies provide a consistent range:

- **\$30,000–\$50,000 per person annually**

This includes:

- Emergency room visits and hospital stays
- Law enforcement and jail time
- Emergency shelters
- Outreach, case management, and social services

Additionally, a Central Florida study estimated ~\$31,000 per year per homeless person in emergency public costs—while supportive housing cost ~\$10,000 annually. Moreover, and much closer geographically to the community of these EACs, [Destination: Home](#) (in Santa Clara County, adjacent to the south of San Mateo County) found that \$3 billion in services were provided to homeless residents in the six-year period of the study (from 2007 to 2012). Annualized, the cost of homelessness-related services cost Santa Clara County \$520 million each year and, more specifically, the population defined as “persistently homeless” cost the County \$83,000 per person per year (and these figures very likely have gone up since the time of the study).

Implications for San Mateo County

While San Mateo County does not publish a public per-person estimate of the cost of homeless to public agencies and services, the following factors apply:

Healthcare & Emergency Services

- Unhoused individuals often rely on emergency care, which is the most expensive and least efficient form of medical service.

- San Mateo County’s Health System and local hospitals bear unreimbursed costs of treating uninsured, unhoused residents.

Law Enforcement & Public Safety

- Police often serve as frontline responders to homelessness.
- Arrests, incarceration (e.g., for trespassing or loitering), and legal processing add to the per-person cost.
- The San Mateo County Sheriff’s Office and correctional facilities see repeated interaction with the unhoused population, increasing operational costs.

Shelter & Outreach

- County-supported shelters cost **thousands of dollars per person per month**, especially for high-needs individuals.
- Outreach programs (often funded through **Measure K**) add caseworker and transportation costs.

Below is the story of Salvador, a JobTrain client on the verge of homelessness who persisted in the program until he found a job. He now works as a cook at Saint Dominic Church in San Francisco and as a prep cook for the Bon Appétit Company.

JobTrain Client Spotlight: Salvador from South San Francisco⁶⁸

“Salvador had been out of work for over three years and was on the verge of homelessness when he first started working with me back in January. He came with a strong background in cooking, including previous experience as a supervisor—but a criminal record made it difficult for him to get hired. Still, he was fully committed to the process, showing up to every appointment, staying in close contact, and working hard to apply to countless jobs and write tailored cover letters. With ongoing support, including transportation assistance during the first two weeks of his new job, Salvador is now employed as a cook at Saint Dominic Church in San Francisco and works as a prep cook for the Bon Appétit Company.”

Moving forward, it is imperative that data on income from all sources, including employment and public benefits, for individuals and their families served by the EACs be collected consistently in addition to other factors, such as history of homelessness and risk of housing instability, to ensure the necessary data are available for a future impact study of these three EACs.

⁶⁸ JobTrain Progress Report - May 2025

VIII. RECOMMENDATIONS

In this chapter, Head and Heart offers a few recommendations to further strengthen data practices, programming, and make the case for ongoing funding and support of the EACs. These three domains are both foundational and inter-related. Strong data practices should drive ongoing program reflection and improvements, both of which are essential for securing ongoing funding to ensure sustainability.

Ongoing Data Collection

As stated earlier, there are opportunities to strengthen and bring consistency to JobTrain’s and Renaissance’s data collection and reporting in support of next steps on the evaluation journey.

For both providers, multiple data fields are incomplete and/or inconsistently tracked, which makes it difficult (if not impossible) to comprehensively answer foundational questions such as:

- At baseline (program intake), what barriers to employment and challenges to small business success are clients experiencing? Consider:
 - Housing stability
 - English language fluency
 - Highest level of education achieved
 - Digital literacy
 - Criminal / juvenile justice system involvement
 - Veteran status
 - Disability status
- At baseline (program intake), what is client’s current personal and family income from all sources, including employment, small business revenue, and public benefits? Public benefits on which data should be collected include:
 - CalFresh
 - Medi-Cal
 - General Assistance
 - Housing Assistance (Section 8 vouchers and emergency rental programs)
 - Unemployment Insurance
- How do clients’ personal and family income change (if at all) from all sources, including employment, business revenue, and public benefits after participating in JobTrain and/or Renaissance programs? To what extent are the EACs reducing reliance on public benefits and contributing financially to the tax base for these communities?

- To what extent are clients served by the EACs truly a unique service population that otherwise would fall through the cracks, as differentiated from clients eligible to receive public benefits provided by San Mateo County Core Services Agencies?

Providers should review the data that is currently being collected with an eye for prioritizing collecting what is most important and remove fields that are not actionable nor contribute directly to the potential for an impact study. One example of fields to remove are “legacy fields” with information that programs either no longer collect (such as country of origin) or have switched to collecting in a different format (e.g., income eligibility limits). Moreover, to enhance the response rate to Renaissance’s client survey, it is strongly encouraged that every client receive an incentive for completion, such as a \$100 gift card (rather than entering clients into a raffle for a single or a few larger dollar amount prizes).

It also appears that there is some variation in data collection processes across sites (e.g., supportive services tracking for JobTrain) that would benefit from cross-site training to elevate the consistency with which data-tracking happens across sites.

Additionally, improved data collection and reporting could help EAC providers to better understand and increase their impact. Examples of issues to address (some of which are mentioned above) include:

- JobTrain’s data fields which have very low response rates (disabled, veteran, justice involvement, food stamps, other public assistance, substance use, literacy challenge)
- JobTrain clients’ employment retention data (e.g., employment status at 6 months after the position start date). Many clients were lost to follow-up or refused to answer, according to JobTrain’s quarterly reports.
- Renaissance clients’ business revenue, profits, and other indicators of business health. Quarterly survey responses were low (the Head and Heart evaluation team and members of the Renaissance team are discussing strategies to increase the response rate).

Furthermore, to the extent that Renaissance clients better understand their own businesses’ outlook (including revenue, expenses, profit), they will be better positioned to seek outside support and investment. One client requested more guidance from Renaissance on how to find grants and scholarships for their startup businesses – a “step by step on how to find grants or scholarships to win.” This client explains:

“If there was something to elevate my business to where I would need to take a course, [then Renaissance] would have that money in place to allow me to even take that class.... they could maybe [make] it easier for us to feel comfortable, to go in those spaces, because, you know, when you don't have the funding, it's kind of intimidating to go to a class and it's like, 'Well, you don't really belong here...’”

– Renaissance Client

Services and Programming

This section summarizes potential ways that EACs can strengthen and improve their outcomes. In addition to articulating successes of the EACs, several interviewees noted operational challenges and opportunities to strengthen EACs' internal operations. These areas include:

- Staff turnover (an endemic issue in the nonprofit sector, particularly in high-cost-of-living areas)
- Staff desire for additional training on best practices in workforce development and entrepreneurship
- Inconsistencies in data collection and reporting, including the need for additional variables to be collected for an in-depth impact evaluation (as mentioned previously)

In focus groups, JobTrain clients offered a few suggestions for program improvement, including:

- Promote offerings more widely to increase community awareness
- Offer different types of job placement options as part of job search services (e.g., restaurants instead of construction)
- Provide more basic needs supports to stabilize during transition (food, temporary rental assistance), especially when there are delays in the hiring process
- Increase transportation options for evening programs
- Consider offering monthly passes for the Clipper card, so that clients aren't required to go into the JobTrain office for transit support
- Help clients connect to legal services if facing previous unfair labor practices
- Provide childcare so that parents can attend more easily (this could also create job opportunities for EAC clients who offer childcare)

Some participants recommended ways in which EAC staff might help increase community engagement through outreach.

A Renaissance client explained how Latinos are "sometimes scared to ask City Hall," so they don't know about EAC services. However, she encourages Renaissance to lean more on the capital and trust that staff have already built locally – this client suggests that Renaissance staff should personally publish on their Facebook or social media pages to encourage more to come seek services, due to the trust they've established within their local communities.

Referring to an EAC staff person, this client said that the Director is known by everyone, gives a

"[A program on managing money] ... how to save, or the best place to save, or, you know, just like a money program like to help, like, younger audiences, save their money, and maybe like buying a house or buying a car. Like, what do you need? How to build your credit score?"

– Renaissance Client

lot of “confianza” (trust) and is very “amable” (friendly). As the client explains, many people are very interested in having their own business, but they don’t know where or how to get started.

Another Renaissance client echoed the call for the EACs to help small businesses gain more access to capital. One client suggested that a grant in the range of \$5,000-10,000 could help accelerate her business by helping to cover upfront costs needed to scale, such as renting a commercial kitchen with multiple burners, paying people to help her prepare products, and purchasing materials.

Ongoing Funding and Sustainability

ARPA dollars that became available in the early years of the COVID-19 pandemic provided the initial seed and launch funding for the EACs. ARPA funding was intended to support economic stability, opportunity, and advancement among the most vulnerable and at-risk community residents. The findings of this study certainly uphold that the funding has gone to serve and support the intended target population.

Now, the EACs are confronted with the question of ongoing funding for long-term sustainability. Of course, in the current federal climate, in which vast swaths of public services are being defunded and dismantled, state and local budgets will become increasingly saddled with the cost of providing equitable opportunities for community members, particularly those who experience the disadvantages of systemic oppression. While the State of California will continue to have some level of funding for workforce development and small business entrepreneurship, overall dollars will likely be reduced as a result of increasing competition and need for state-level resources – a dynamic which then gets passed down, to some extent to the county and city levels.

Within this context, and while public funding sources absolutely should still be pursued at every opportunity, it is likely that there will be (and is now) an increasing responsibility for private philanthropy (institutional and individual) to step in to support economic advancement programs like these three EACs. Making the case for private – especially philanthropic – investment in community economic development and resident economic advancement is greatly aided by the following:

- Having a clearly articulated Theory of Change (see Appendix)
- Meeting a significant and unmet need
- Demonstration of meeting that need, with high demand for programming
- Capacity to measure and report on client-level outcomes
- Progress on the journey towards, and accomplishment of, an impact study
- Demonstration of program scalability

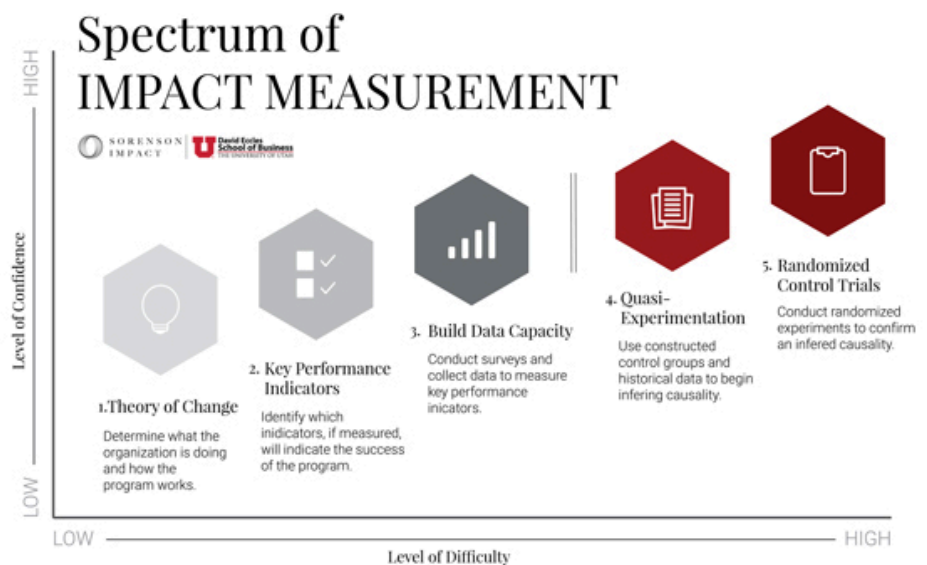
This formative evaluation supports all of these requirements and intentions, as described in more detail in the Conclusions chapter below. The core recommendation regarding ongoing funding and sustainability is that the EACs continue on the pathway of evidence-building that this study formally launched.

IX. CONCLUSION

This chapter provides the head and Heart team’s conclusions based on the findings and learning from this formative evaluation.

A Crucial and Valuable First Step on the Journey to Demonstrating *Measurable* Impact

This formative study was a crucial and immensely important first step on a longer-term evidence-building journey for these three EACs. The Spectrum of Impact Measurement graphic shown below (from “A Playbook for Designing Social Impact Measurement” published in Stanford Social Innovation Review in December 2018) highlights several key steps on the continuum of readiness for an impact evaluation, which in the case of the EACs, would most likely entail a quasi-experimental study using data on clients on program wait lists. Other similar paradigms depicting steps on the pathway to impact evaluation underscore the value and importance of undertaking a formative evaluation study, such as this one, to prepare for and guide building data capacity strategically to enable an impact study.



The previous chapter highlighted specific questions around which to organize data-related capacity-building. The foundational questions provided there can help drive a Learning Agenda and Evidence-Building Plan that help demonstrate the significant value of the EACs with greater rigor.

Creating Economic Opportunities for Marginalized Communities is Essential to Racial and Gender Equity

Creating economic opportunities for marginalized communities is not just an essential step toward racial and gender equity—it is foundational. Data consistently shows that systemic disparities in income, wealth, employment, and access to capital are core drivers of persistent racial and gender inequities. Advancing economic opportunity is a powerful lever for dismantling these structural barriers and addressing:

- The vast and persistent income and wealth inequity grounded in [race](#) and [gender](#);
- The prime [driver of upward mobility](#) as investments in skills training, entrepreneurship, infrastructure, and small business support in marginalized communities can yield outsized returns in employment and income mobility; and
- Poor [health](#), [education](#), and [civic](#) outcomes associated with economic inequity;

Plainly, economic opportunity is not a downstream benefit of racial and gender equity—it is a *prerequisite*. Systemic barriers to employment, wealth-building, and entrepreneurship are central to the persistence of inequity. Data shows that strategic investments in marginalized communities not only advance justice—they also unlock economic growth, resilience, and innovation for the entire society.

In the context of challenging budgetary choices and tradeoffs, public agencies, foundations, corporations, and high-net-worth individuals who care about San Mateo County communities would do very well to invest in these Economic Advancement Centers.

Filling a Gap in Local Systems and Meeting Unmet Needs

While greater and more rigorous evidence can and should be collected to demonstrate the systemic gaps that the EACs are filling, Head and Heart firmly concludes that these Centers are filling a local systemic gap and they are meeting unmet needs among some of the most vulnerable members of some of the most diverse and disadvantaged communities in San Mateo County. Based on review of the vast array of data sources included in this study, the evaluation team is confident that the EACs fill systems-level gaps, particularly inasmuch as they provide community members with a comprehensive and coordinated range of services to advance economically.

Moreover, the EACs uphold best practices for workforce and economic development, including co-location with safety net services, in-person programming, community engagement, feedback loops, and alignment with broader policy and regulatory environments. The EACs are indeed linguistically and culturally responsive “one-stop shops” providing in-person services with a high level of coordination across programs offering a wide range of comprehensive, walk-in supports that are largely not available elsewhere. Program participants enjoy personalized, individual support from EAC staff who build trust to effectively serve community members who are most vulnerable due to historic marginalization, and thus most are in need of economic advancement.

These EACs, located in highly diverse and high need communities in San Mateo County were not only an excellent idea emerging from the economic crisis of the COVID-19 pandemic, they remain, today, vital assets to the local workforce development and small business entrepreneurship ecosystems that deserve ongoing investment and study.

X. APPENDICES

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A. Evaluation Plan

Evaluation Plan: San Mateo County Economic Advancement Centers

Introduction and Context

The following outlines the plan for conducting a formative evaluation of the economic advancement centers opened within the past three years – an epoch dominated by the tectonic effects of the absolute lockdown necessitated by the COVID-19 pandemic and public health crisis – in three San Mateo County communities: South San Francisco, Half Moon Bay, and North Fair Oaks. These economic advancement centers (collectively referred to as “the Centers”) were opened in response to identified needs for services and supports among job seekers, small businesses, and entrepreneurs. While the three Centers are in different stages of development and operation, each is interested in harnessing learning from their respective and collective experiences to date to inform their programmatic strategy and optimize their long-term financial sustainability by understanding and communicating the value they deliver to their communities and how they can be most effective and relevant moving forward. Thus, the core architects and implementers of the Centers engaged a professional third-party evaluation consultant, Steven LaFrance of Head and Heart Advisory, to design and conduct the evaluation study described herein.

The Economic Advancement Center in South San Francisco (EAC-SSF) was the first to open its doors (virtually in July 2021 and then officially in February 2022) in response to high unemployment rates at the peak of COVID and the growing divide between the city’s booming biotech sector and small family, immigrant-owned businesses.^[1] Located in one of the city’s lowest income census tracts, the EAC-SSF offers rapid job placement services and career pathway programs along with the city’s workforce development program as well as small business and entrepreneurship support services to residents and existing small business owners of South San Francisco and throughout North San Mateo County. The City of South San Francisco is partnering with Renaissance Entrepreneurship Center and JobTrain to deliver these services. The services have since been expanded to some social services system navigation staff provided under the City of South San Francisco’s Promotores Program. Clients are referred to housing, food security, and health care services. The YMCA and County Health also have a presence in the space on a weekly basis. The EAC-SSF has grown to a more holistic collage of economic mobility services that were not initially envisioned. Moreover, early results exceeded initial goals in terms of clients served and there is ongoing high demand for services as reflected in wait lists for services and program offerings. Historically, South San Francisco and North San Mateo County have been described as resource deserts where people had to travel outside of the area for needed services and support, contributing to low engagement with services among residents in the past.

In March 2021, the County entered into an MOU with SSF for \$200,000 – half for operations and half for small business support services – framed at the time as a “pilot program.” Given the early successes of the EAC-SSF, the San Mateo County Board of Supervisors then allocated \$5 million to develop two additional centers, one in Half Moon Bay and one in the unincorporated area of North Fair Oaks. In January 2024, the City of Half Moon Bay opened the Opportunity Center of the Coastside (OCC) as part of a larger comprehensive economic recovery effort to address COVID-19 recovery needs and pave the way for a more sustainable and resilient future, as laid out in the 2022 Coastside Recovery Report entitled, “[Building a More Equitable, Vibrant, and Resilient Coastside Economy](#).” The Coastside region is uniquely vulnerable due its geographic isolation, lack of economic diversity and job growth, income inequality, high cost of housing, and lack of services and infrastructure. The OCC houses workforce development programming, small business support, and a business incubator to harness the Coastside’s unique industries and assets, build entrepreneurship capacity, and support business and job growth. The OCC brings together multiple nonprofits dedicated to helping the Coastside work, providing classes, programs, and mentoring services for entrepreneurs, business owners, and those looking for work or new skills.

In 2023, the Economic and Employment Center (EEC) opened in the unincorporated area of North Fair Oaks (NFO). One of the EEC’s core partners (also working with the EAC in South San Francisco and the OCC in Half Moon Bay), Renaissance Entrepreneurship Center, conducted a feasibility study in planning for the EEC that found strong interest among businesses, local leaders, and residents for an array of supports. Based on the study findings, the EEC provides employment support services to job seekers as well as entrepreneurship training and supports to small businesses including consulting, networking, workshops, training, and access to capital. Through its programming, the EEC aims to empower individuals in the NFO community and to transform lives through employment and entrepreneurship.

Evaluation and Learning Questions

The evaluation is designed to answer the following questions – organized by type – to the extent possible given the availability of relevant data. The evaluation methods to address these questions are described in the final section of this document.

Process and Implementation Evaluation and Learning Questions

The evaluation will address these questions regarding how the Centers were designed and how they have been implemented to date:

- What were the implementation goals of each center and to what extent did each community reach these goals?
- What contextual factors facilitated or inhibited implementation?
- What services were offered at each center and to whom? What are the characteristics of program participants in each community?

- What accommodations do the Centers offer to ensure that programs and services are accessible and relevant for the populations and communities they serve?
- How well do the array of programs and services at each Center function in concert with each other? Are there programs and services that are not working well in the mix? Are there programs and services that are missing?
- What are the key learnings to date regarding what it takes to design and operate effective economic advancement centers in these communities? What was common to each community and what was different?
- How well have the various partnerships in place for operating the Centers and delivering programs and services been functioning? What has been working well and what could be improved?
- What is the current state of the community contexts in South San Francisco, Half Moon Bay, and North Fair Oaks, particularly with respect to economic recovery from the effects of the COVID-19 lockdown years? What has transpired in these communities in the past three years that could either accelerate or slow recovery and future growth?
- What macroeconomic trends could affect the Centers and how do they, or how should they, best address arising shifts and new needs / issues?
- What are the potential implications of the current state of the community contexts for the programs and services the Centers offer, particularly with respect to small business supports?
- What are the emerging growth industries in each of the respective Centers' local economies today and in the foreseeable future? What are the gaps and where are the opportunities?
- How have the centers been funded to date, what are the current funding constraints / realities today (as COVID relief funds dry up), and what efforts are underway and needed to ensure financial sustainability? What is a sustainable funding model moving forward?
- What are considered best practices and top priorities among funders and in the research for workforce development and community economic development centers and to what extent do the EAC-SFF, OCC, and EEC implement these best practices? Are there opportunities for the Centers to better align with and implement best practices?

Outcome Evaluation and Learning Questions

The evaluation will address these questions regarding the extent to which the Centers have achieved outcomes at the levels of individual service recipients and program participants, the local workforce and economic development systems, and the local communities within which they operate:

- What are the early outcomes and results of the services provided at the EAC-SFF, OCC, and EEC-NFO among program participants? How do outcomes differ among meaningful subgroups of the population reached by programs and services?
- What stories and testimonials speak to the value of the Centers for residents and the community as a whole?
- What factors facilitate or inhibit achievement of progress and outcomes for program participants?
- What was available for job seekers, small businesses, and entrepreneurs in the three communities before the Centers were opened? How did – and do – the landscape in these communities, in San Mateo County more broadly, and in other California Counties compare? What gaps did the Centers fill in each of the three communities?
- What unique contributions do the EAC-SFF, OCC, and EEC-NFO make to the local workforce development systems in their respective communities?
- How do the architects and implementers of the Centers view what economic development for a community means and entails, based on their experience and learning in the context of an evolving economy? How have their experiences with the Centers impacted these views?
- What, if any, have been the unanticipated benefits of the Centers? What, if any, have been the unanticipated negative consequences of the Centers?
- What is an estimate of programmatic costs per program participant and what do those costs return to those participants – and the community? How do these costs compare with known standards?

Evaluation Methods, Data Sources, and Levels of Analysis

The evaluation design is multi-method including quantitative and qualitative measures to explore and examine the process- and outcome-related questions above. Quantitative data on service delivery and program participation collected by providers will be summarized for each of the three Centers based on the data they have been collecting since opening. To the extent possible, data will be aggregated across the three Centers. Process measures including number and type of services provided as well as the number and characteristics of service recipients and program participants will be analyzed. Qualitative data on satisfaction and experiences with the Centers' programs and services, what served participants well and what could be improved, will be collected via interviews and focus groups.

Quantitative data on outcome measures at the individual service recipient and program participant level will be collected from the three Centers and summarized for the evaluation. Indicators such as skills built, jobs attainment, and businesses launched will be analyzed. Service and program delivery costs also will be summarized. Additionally, qualitative data on outcomes at the individual level will be collected via interviews and focus groups with sponsors of the Centers, service providers, and participants. Data on systems- and community-level

outcomes will be collected primarily via interviews with stakeholder who hold the broader perspective of how the economic advancement centers fit within the local workforce and economic development systems.

Given that funding and operating the Centers involves multi-stakeholder collaboration and partnerships, the evaluation will be implemented through an inclusive, learning-oriented approach. Stakeholders will be convened three times over the course of the evaluation at the following meaningful junctures in the process:

- **Early Design and Pre-implementation Phase** – Before data collection begins for the evaluation, Center stakeholders will be brought together to discuss the questions framing the study and the methods to answer these questions. Through the initial convening, stakeholder input will inform and shape the focus and approach to the evaluation.
- **Mid-implementation Phase** – With an initial round of quantitative data analysis conducted and a first of two planned rounds of interviews completed, Center stakeholders will be brought together once again to engage in collaborative meaning-making of the preliminary findings. Stakeholders also will have the opportunity to co-create the focus of the remainder of the data collection and analyses that will be conducted through the end of the study, including the second planned round of interviews.
- **Final Reporting Phase** – Once a final round of analysis of quantitative data is completed and content analysis procedures are conducted on all interview data, a final report will be prepared for review and input across all stakeholders, once again to engage in a collaborative meaning-making process. A third and final convening of stakeholders will be held for this purpose as the evaluation study comes to a close in May-June 2025.

Ultimately, the evaluation will summarize achievement of process and implementation-related goals, early progress and outcomes, and recommendations for strategy moving forward, including what data are needed at the local level to continue to track processes, outcomes, and learning on an ongoing basis.

^[1] Source: Proposal to Evaluate Implementation of Economic Advancement Centers in Three San Mateo County communities submitted to Chan Zuckerberg Initiative on August 30, 2022.

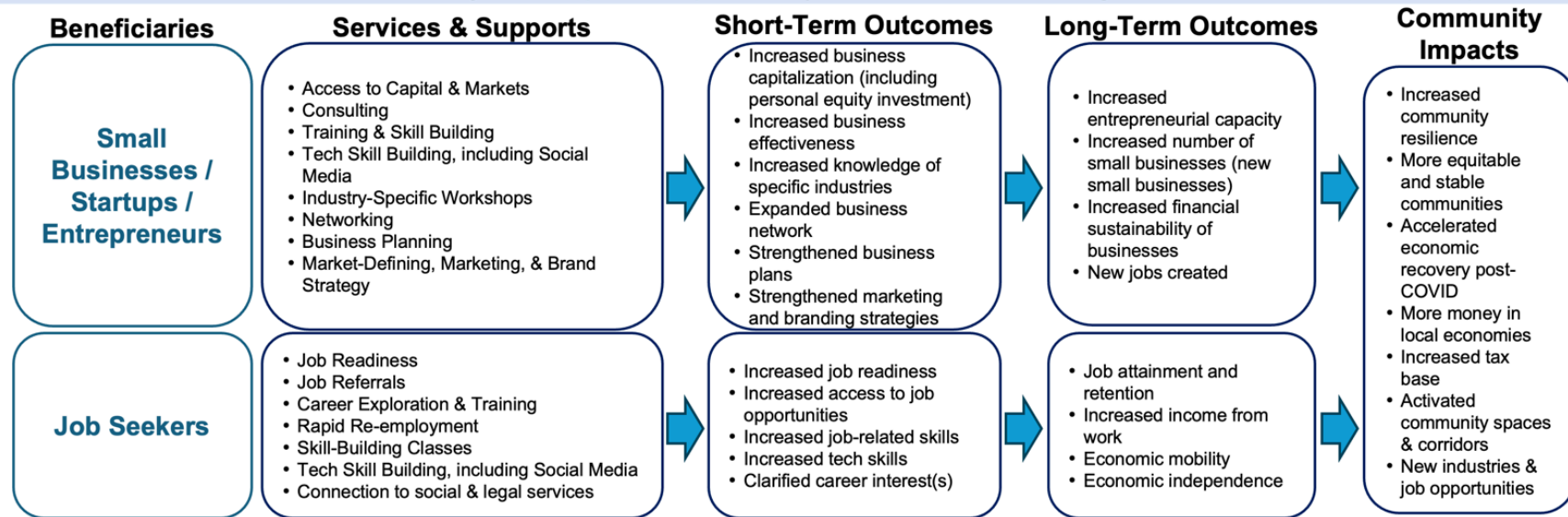
B. Theory of Change: San Mateo County Economic Advancement Centers

Theory of Change: San Mateo County Economic Advancement Centers

Revised
September 3, 2024

Context

- Between 2021 and 2023 **three economic advancement centers** were opened to respond to the devastating impacts of the twin public health and economic crises brought on by the COVID-19 pandemic with the goal of advancing strategies that lead to more **equitable, vibrant and resilient local economies**.
- These Centers are located in **unique, diverse, and underserved San Mateo County communities: South San Francisco, Half Moon Bay, and North Fair Oaks**.
- Each is **strategically located** within their respective communities – **highly visible, accessible, and welcoming** – to encourage foot traffic and engagement.
- They were opened in response to **high need for services and supports among job seekers, small businesses, and entrepreneurs**.
- They serve **both their immediate surrounding and adjacent communities**, making them **broadly valuable resources** for these **underserved communities**.
- While each of the three Centers are in different stages of development and operation, they share in common the **core design elements** and **intended outcomes** depicted here.



C. Provider Interview Protocol: Evaluation of Economic Advancement Centers in Three San Mateo County Communities

Interviewee:	Date:
Organization:	Position / Title:

Context and Introduction

Over the summer of 2024, the County and local lead sponsors of the three Economic Advancement Centers (EACs) that were opened over the past few years – in South San Francisco, on the Coastsides, and in North Fair Oaks – engaged a third-party evaluator, Steven LaFrance of [Head and Heart Advisory](#), to conduct an evaluation of the Centers. The evaluation is designed to both inform ongoing implementation improvements at the three EACs and to summarize what has been accomplished by the Centers to date, acknowledging that each of the three have different starting points and tenures in operation.

This interview conversation is your opportunity to share your perspective on how well the EACs have been achieving their implementation goals and core objectives to advance strategies that lead to more equitable, vibrant and resilient communities in high-need parts of San Mateo County.

Confidentiality

This interview conversation is **confidential**. Findings will be aggregated across interviewees to identify key themes to include in a report of results. Your comments will not be attributed to you by name. Moreover, there are no right or wrong answers – your honest perspective is what is most important and valued.

Do you have any questions for me before we begin? May I record the interview to back up my notetaking?

Discussion Questions

1. Please describe your role in your organization as well as your role in the EAC-SSF, EEC-NFO, and / or the OCC. How long have you been involved with the EAC(s)?
2. What specific programs and services has your organization been providing at the EAC(s)? What are the general characteristics of the people being served by your programs and services at the EAC(s)?
 - a. How do the services provided at each center **compare with those provided at other types of career centers** / other places served by your organization?
 - b. What has **facilitated** the provision of these programs and services at the EAC(s)?
 - c. What has been a **challenge or barrier** to providing programs and services at the EAC(s)?
3. What barriers do clients experience in accessing services at the EAC(s)?

- a. What **accommodations** does your organization and others offer to ensure that programs and services at the EAC(s) are accessible and relevant for the populations and communities they serve? Consider **staffing, location, language, immigration status, disability status**, etc.
4. What is your assessment of how well the array of programs and services at each Center functions in concert with each other?
 - a. What programs and services, if any, **work especially well** together?
 - b. What programs and services, if any, are **not working well** in the mix?
 - c. What might be **gaps** in programs and services at the Center(s)?
5. Thinking about the various partnerships that running the EACs require – with the County / local leads, with other providers – how would you assess the effectiveness and functioning of these partnerships?
 - a. What is **working well**?
 - b. What could be **improved or strengthened**?
 - c. Are there any partners / partnerships **missing** that should be considered as additions to the mix?
6. From your perspective, to what extent has/have the EAC(s) been achieving the core goal and objectives around advancing strategies that lead to more equitable, vibrant and resilient communities in high-need parts of San Mateo County?
 - a. **In what specific ways** – such as **client outcomes** and **impacts on the local workforce development system** – have you observed or experienced the EAC(s) achieving the core goal and objectives?
 - b. What has **facilitated** success and progress for the EAC(s)?
 - c. What has **stood in the way or served as a barrier** to success and progress for the EAC(s)?
7. From your perspective, what lessons have been learned to date regarding what it takes to design and operate effective economic advancement centers in these communities?
 - a. What has been learned about how the **community context** of the EACs factors into their effectiveness – and the need for them?
8. From your perspective, what, if any, have been the **unanticipated benefits** and potential **negative consequences** of the Centers?
9. Are there any other **positive stories** or **critical anecdotes** about the achievements and operations of the EAC(s) that you would like to share as part of this evaluation process?
10. Do you have any other comments or feedback about the EAC(s) that you would like to share as part of this evaluation process?

Thank you for your time and insights!

D. Funder and Community / Subject Matter Expert Interview Protocol: Evaluation of Economic Advancement Centers in Three San Mateo County Communities

Interviewee:	Date:
Organization:	Position / Title:

Context and Introduction

Over the summer of 2024, the County and local lead sponsors of the three Economic Advancement Centers (EACs) that were opened over the past few years – in South San Francisco, on the Coastsides (in Half Moon Bay), and in North Fair Oaks – engaged a third-party evaluator, Steven LaFrance of [Head and Heart Advisory](#), to conduct an evaluation of the Centers. The evaluation is designed to 1) inform ongoing implementation improvements at the three EACs, 2) to summarize what has been accomplished by the Centers to date (acknowledging that each has a different starting point and tenure in operation), and 3) to ascertain these Centers’ contributions to their respective local workforce and economic development systems.

Following a set of interviews with providers working at the Centers conducted in the Fall of 2024, and an analysis of client data, I am now conducting a round of interviews with people who are knowledgeable about workforce and economic development generally, and who are familiar with these San Mateo County communities specifically. The goal of these interviews is to place the three EACs in the context of broader workforce and economic development supports as well as to surface how they are situated as resources as parts of the larger workforce and economic development systems within these local communities. Ultimately, the goal of these Centers is to advance strategies that lead to more equitable, vibrant and resilient communities in high-need parts of San Mateo County.

Confidentiality

This interview conversation is **confidential**. Findings will be aggregated across interviewees to identify key themes to include in a report of results. Your comments will not be attributed to you by name. Moreover, there are **no right or wrong answers** – your honest perspective is what is most important and valued. Lastly, we can skip any question that you do not feel comfortable answering for any reason.

Do you have any questions for me before we begin? May I record the interview to back up my notetaking?

Discussion Questions

1. Please introduce yourself, describing your current professional role and, if relevant, your experience with workforce and economic development as well as your familiarity with the high-need San Mateo County communities of South San Francisco, the Coastsides / Half Moon Bay, and North Fair Oaks.

About the Local Economies and Community Landscapes

2. Prior to the opening of these Centers, to your knowledge, what was available for job seekers, small business owners, and entrepreneurs in any of these three communities (South San Francisco, the Coastside / Half Moon Bay, and North Fair Oaks) that you are familiar with?
3. What gap(s) have these Centers filled in each of the three communities? What unique contributions do they (depending on your familiarity: EAC-SFF, OCC, and EEC-NFO) make to the local workforce development systems in their respective communities?
4. How would you characterize the current state of the community contexts in ((depending on your familiarity: South San Francisco, Half Moon Bay, and North Fair Oaks), particularly with respect to economic recovery from the effects of the COVID-19 lockdown years?
 - a. How did – and do – the landscapes and economies in these communities, compared to San Mateo County and other California Counties more broadly?
5. What, to your knowledge, has transpired in these communities over the past 3-4 years that could either accelerate or slow economic recovery and future economic growth?
6. What macroeconomic trends could affect these Centers in the coming years?
 - a. How could they best address arising shifts and new needs / issues?
7. What are the potential implications of the current state of the community contexts, and taking macroeconomic trends into account, for the programs and services the Centers offer (particularly with respect to workforce development and small business supports)?
8. What are the emerging growth industries in each of the respective Centers' local economies today and in the foreseeable future?
 - a. What are the gaps and where are the opportunities?

About Workforce and Economic Development Centers and Programs Generally

9. Based on your knowledge and experience, what does “economic development” for a community mean and entail?
10. What do you consider to be best practices for workforce development and community economic development centers?
11. What do you know or believe to be high priorities among funders of workforce development and economic development centers?
12. To your knowledge, what is a typical (and ideally sustainable) funding model for workforce and economic development centers and programming?
13. To your knowledge, what is a typical per-participant cost for workforce development or economic development programming?

Closing

14. Given the topics we have discussed, is there anyone else you recommend I speak with?
15. Is there anything else you would like to share on the topics we've discussed?

Thank you for your time and insights!

E. Renaissance Entrepreneurship Center: Client Interview Protocol

Date:	
Interviewee Name & Business:	
RenCenter Location:	

Context and Introduction

Hello! My name is _____. I'm calling to seek your feedback on services at Renaissance Entrepreneurship Center – their staff shared your phone number with my colleague Steven (at [Head and Heart Advisory](#)) a few weeks ago. They let us know that you gave permission for us to contact you.

Would you be willing to participate in a short interview by phone? It should take about 15-20 minutes.

As a thank you for your time, we are offering a \$50 gift card to Walgreens, Amazon, or Safeway.

For additional context, Steven from [Head and Heart Advisory](#) is working with Renaissance Center to help them understand how well their programs and services are working for people like you. We are interested in knowing if the services you have received have been helpful, and if so in what ways, as well as what was most helpful *and* what could be improved or done differently to help you earn money.

Confidentiality

This conversation is **confidential**. Your comments will not be attributed to you by name, meaning that we will **not** share your name or your business's name in the report, unless we ask for and receive your explicit permission to do so. Your feedback will be included in a report that we'll share with RenCenter leaders and organizations that fund job training and small business programs in San Mateo County. Also, there are **no right or wrong answers** – your honest perspective is what is most important.

I would like to record our conversation (audio only) for note-taking purposes only. Do I have your permission to record?

Do you have any questions for me before we begin?

Discussion Questions

1. To start, I'd love to learn about how you became involved with Renaissance Entrepreneurship Center. How long have you participated (or did you participate) in their programs? What was your main reason (or purpose) for coming to RenCenter?
2. What types of services and supports did you receive at Renaissance Entrepreneurship Center?

- a. How easy or difficult has it been for you to get the services you needed and wanted from Renaissance Entrepreneurship Center?
 - b. What made it easy to get services? (Probe for accommodations such as language needs, education level, immigration status, disability status.)
 - c. What made it difficult or what challenges did you experience?
 - i. Did Renaissance Entrepreneurship Center do anything to address these difficulties or challenges?
3. Did Renaissance Entrepreneurship Center provide you with referrals to any other services or supports you, your family, or or your business may have needed?
- a. If yes, what other services and supports have you received?
 - b. How easy or difficult was it for you to get those other services and supports?
 - c. Are there other services and supports you need that you were not able to get?
4. **In what ways, if any, have the services and supports you received from Renaissance Entrepreneurship Center helped you and your business?**
- a. What made it possible or easier for you to make progress on your goals in the program? What challenges did RenCenter help you address?
 - b. If you would like, please share a story about what RenCenter’s supports/services have helped make possible for you and your business.
5. **In particular, we want to learn whether Renaissance Center has supported you in any of the following ways. [NOTE: Adjust probing question below, based on their answers to the previous question]**
- support with an existing small business or starting a small business
 - increased sales revenue (and if yes, by how much?)
 - job creation / hiring (and the number and types of jobs created)
 - changes in personal / family income (and if yes, by how much?)
 - access to technology
6. What is your vision of success for your business? Do you feel you are achieving these goals?
- a. Do you plan to continue seeking support from RenCenter? *If yes:* What types of support do you plan to seek and why?
7. What suggestions do you have for how Renaissance Entrepreneurship Center could make their services and supports better?
8. Is there anything else you would like to share with me about your experience with Renaissance Entrepreneurship Center?

Thank you for your time!

F. JobTrain Client Focus Group Protocol

Date:	Site:
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Context and Introduction

Hi everyone! Welcome. We're so glad you're here! Your feedback is so important to help JobTrain keep learning and improving.

My name is _____. I am with a group called [Head and Heart Advisory](#) and am partnering with JobTrain to understand how well their programs and services are working for people like you. We are interested in knowing if the services you have received have been helpful, and if so in what ways, as well as what was most helpful *and* what could be improved or done differently to help you earn money.

As a thank you for your time, we'll send each of you a \$50 gift card to Walgreens, Amazon, or Safeway. At the end of today's conversation at [TIME], we'll ask you each to let us know which gift card you choose.

Confidentiality

This conversation is **confidential**. We will use direct quotes from today's conversation, but your comments will not be attributed to you by name. If you do not want to answer a question you're welcome to say "pass" or "skip." We also ask that you protect each other's privacy by NOT sharing other people's answers outside of this group.

Also, there are **no right or wrong answers** – your honest perspective is what is most important. Please speak up if you have a different opinion than what someone else shares. We really ask you to be as honest and frank as possible - your honesty will help the program improve in the future.

Also, we plan to record today's focus group conversation for note-taking purposes only. We will not share the recording with anyone.

Do you have any questions for me before we begin?

Discussion Questions

1. Let's begin by having everyone introduce themselves. Please share your name, where you live now, how long you have been working with JobTrain, and the reason you came to JobTrain.
2. How easy or difficult has it been for you to get the services you needed and wanted from JobTrain?
 - a. What made it easy to get services? (Probe for accommodations such as language needs, education level, immigration status, disability status.)
 - b. What made it difficult or what challenges did you experience?
 - i. Did JobTrain do anything to address these difficulties or challenges?

3. Did you receive referrals from JobTrain to any other services or supports that you or your family may have needed (like for help getting any public assistance around housing and food, or any other kind of service from another organization)?
 - a. If yes, what referrals for other services or supports did you receive?
 - b. Did you get those services or supports? From what agency or providers?
 - c. How easy or difficult was it for you to get those other services and supports?
 - d. Are there other services and supports you need that you were not able to get at this Center?

4. In what ways, if any, have the services and supports you received from JobTrain helped you? What was the biggest change you experienced as a result of JobTrain? (Probe for improved job skills, getting placed in a job, increasing personal / family income, support with an existing small business, starting a small business, access to technology, etc.)
 - a. What made it possible or easier for you to make progress on your goals in the program?
 - b. What did you like best about JobTrain?
 - c. Do you plan to continue seeking support from JobTrain? *If yes:* What types of support do you plan to seek and why?

5. If you would like, please share your story about how the services and supports from JobTrain helped you.

6. What suggestions do you have for how JobTrain could make their services and supports better?
 - a. What did you like least about JobTrain?

7. Is there anything else you would like to share with me about your experience with JobTrain ?

Thank you so much for speaking with us today! As our final question, please write which gift card you'd like to receive via chat – Amazon, Safeway, or Walgreens. If you're unable to use the chat, Sarah will follow up with you via email.

Thank you for your time!

G. Summary of Research on Governmental Cost Savings for Job Placements

When a previously unemployed San Mateo County, CA resident starts earning \$22.00 per hour, local and county governments experience cost savings in several key areas.

1. Reduced Public Assistance Costs. Many unemployed individuals rely on public benefits:

- CalFresh – Average monthly benefit in CA is about \$180 per person.
- Medi-Cal – The state pays about **\$7,500 per enrollee per year.
- General Assistance – Provides \$400-\$600 per month for eligible individuals.
- Housing Assistance – Section 8 vouchers and emergency rental programs.
- Unemployment Insurance – Typically provides **\$450 per week** (if eligible).

If the individual was fully dependent on assistance before employment, the county and state could save:

- CalFresh: ~\$2,160 per year
- Medi-Cal: ~\$7,500 per year
- General Assistance: ~\$6,000 per year
- Unemployment Insurance: ~\$23,400 per year (if on max benefits for 52 weeks)

Potential total savings: \$10,000–\$30,000+ per person per year, depending on benefits received.

2. Increased Tax Revenue. For residents that begin to earn \$45,760 per year:

- State Income Tax: Estimated \$2,500–\$3,500 per year
- Local Sales Tax: Increased spending in the local economy means \$1,500–\$3,000 in additional sales tax revenue.
- Payroll Taxes: More contributions to Social Security, Medicare, and disability insurance, reducing state burden.

Estimated total additional tax revenue: \$4,000–\$7,000 per year.

3. Lower Crime and Public Safety Costs. Studies show unemployment correlates with higher rates of property crimes, homelessness-related policing and emergency services, and incarceration costs (\$50,000+ per inmate per year in CA). Employment reduces reliance on law enforcement, social services, and emergency healthcare.

Estimated savings: \$1,000–\$5,000 per year per individual** in reduced public safety and emergency costs.

4. Reduced Homelessness Services Costs. San Mateo County spends \$50,000–\$100,000 per homeless person per year on shelters, emergency healthcare, and services. Stable income lowers the risk of eviction and homelessness, reducing these costs.

Estimated savings: \$5,000–\$20,000 per year per individual at risk.

Total Estimated Cost Savings to Local & County Governments

Adding up all categories, the total estimated cost savings and revenue increase per person ranges from \$20,000 to \$60,000 per year, depending on previous public assistance and risk factors.

Data Sources

This analysis is based on estimates from federal, state, and local government reports, academic studies, and economic models.

1. Public Assistance Programs (Cost Savings Estimates)

- CalFresh (SNAP in California)
 - Data Source: [California Department of Social Services \(CDSS\)](#)
 - Average SNAP benefits in CA: ~\$180/month per individual
- Medi-Cal (California's Medicaid Program)
 - Data Source: [California Department of Health Care Services \(DHCS\)](#)
 - Annual cost per enrollee: \$7,500–\$10,000 (varies by demographic)
- General Assistance (GA) in San Mateo County
 - Data Source: [San Mateo County Human Services Agency](#)
 - GA benefits: \$400–\$600/month
- Unemployment Insurance (UI) Benefits
 - Data Source: [California Employment Development Department \(EDD\)](#)
 - Maximum UI benefit: \$450/week (~\$23,400/year if fully utilized)
- Housing Assistance (Section 8, Homelessness Services)
 - Data Source: [San Mateo County Department of Housing](#)
 - Estimated annual support per person: \$10,000–\$20,000+

2. Tax Revenue Estimates

- California State Income Tax
 - Data Source: [California Franchise Tax Board \(FTB\)](#)
 - Estimated tax rate for \$45,760 income: ~6–8% (\$2,500–\$3,500 per year)
- Sales Tax Revenue
 - Data Source: [California Department of Tax and Fee Administration \(CDTFA\)](#)
 - San Mateo County sales tax: ~9.375%
 - Estimated additional revenue per new worker: \$1,500–\$3,000/year
- Payroll Tax (Social Security & Medicare)
 - Data Source: [IRS and Social Security Administration](#)
 - Employer + Employee FICA: 15.3% of wages (\$7,000 in new contributions)

3. Crime & Public Safety Costs

- Crime & Unemployment Studies
 - Data Source: [Bureau of Justice Statistics \(BJS\) & Local Law Enforcement Data](#)
 - Research: Unemployment correlates with a higher likelihood of property crimes and homelessness-related policing costs.
- Homelessness Services & Criminal Justice Costs
 - Data Source: [San Mateo County Continuum of Care \(CoC\) & CA Policy Lab](#)
 - Cost of homelessness services: \$50,000–\$100,000 per unhoused person per year
- Jail/incarceration cost in California: \$50,000+ per year per inmate (California Department of Corrections & Rehabilitation)

4. Economic Multiplier & Local Impact

- Multiplier Effect Estimates
 - Data Source: [U.S. Bureau of Economic Analysis & Regional Economic Studies](#)
 - Economic multiplier for local spending: 1.5–2.0
- Spending patterns based on Consumer Expenditure Surveys (CES) from the U.S. Bureau of Labor Statistics (BLS) (<https://www.bls.gov/cex/>)

BUSINESS OF THE COUNCIL OF THE CITY OF HALF MOON BAY

AGENDA REPORT

For meeting of: **September 16, 2025**

TO: Honorable Mayor and City Council

VIA: Matthew Chidester, City Manager

From: Maz Bozorginia, Public Works Director/City Engineer
Helen Wolter, Senior Sustainability Analyst

TITLE: **COMMUNITY MICROGRID DISCUSSION**

RECOMMENDATION:

Receive a report on Community Microgrid Options and direct staff as appropriate.

STRATEGIC ELEMENT:

This recommendation supports all Elements of the Strategic Plan.

FISCAL IMPACT:

There is no fiscal impact associated with this discussion.

BACKGROUND:

Half Moon Bay has a history of infrastructure challenges, including power and internet outages during major storm events. The City has made efforts to shore up its critical facilities, including redundant internet services, and backup generators to keep City operations running during emergencies. PG&E and the City have an agreement in place that allows the use of the library facility as a Community Resource Center during outages, and PG&E has installed infrastructure to facilitate the use when needed.

In the past 10 years, the frequency and duration of power outages has increased, especially in the southern portion of town, beginning near the intersection of Highway 1 and south Main Street. Data collected by residents in the area and confirmed by PG&E shows that the neighborhoods south of town, which include Ocean Colony, Cañada Cove (senior housing), and Moonridge (farmworker housing) - as well as several hotels and restaurants that support the local economy - are some of the most impacted by outages in the entire County. These outages put many vulnerable residents at risk and also have significant economic impacts on businesses and City revenues. Council, Staff, and residents have been working with the County, PG&E, PCE, and others to identify solutions that will make the electrical grid more reliable and more resilient in our changing climate. Recent successes with PG&E will likely result in several small, short-term improvements, but larger, more creative solutions are necessary to permanently resolve these issues.

DISCUSSION:

Peninsula Clean Energy’s Innovation Strategy team is preparing a funding application with PG&E under the California Public Utility Commission’s Microgrid Incentive Program (MIP) to develop a community microgrid on the Coast. Community microgrids keep critical facilities (e.g., downtown corridors, police/fire stations, community centers) powered during outages using clean, centrally located distributed energy resources (DERs). More information on these facilities and the MIP can be found on the PG&E website at: <https://www.pge.com/en/save-energy-and-money/rebates-and-incentives/community-microgrids.html>.

Half Moon Bay is eligible under the MIP, and an application for funding with PG&E is due mid-December 2025. PCE staff plans to bring a project to their full Board in November once details are finalized. City Staff seeks guidance from Council on priorities related to pursuing this funding, including where and at what scale to seek funding.

Staff is meeting with PCE on Monday, September 15, to learn more about the project, and will provide additional details at the Council Meeting.