

# Calwa Recreation and Park District Agenda Item Transmittal



**Meeting Date:** January 21, 2020

**Agenda Item Number:** G-1

**Wording for Agenda:** Update on Prop. 68

**Submitting:** District Administrator

**Contact Name and Phone Number:** Felix Ortiz  
559-264-6867

**Department Recommendation:** Update only

**Summary/Background:**

Someone from Fresno Building Healthy Communities will be here to update Board on Prop. 68.

**Prior Board Actions:** The Board approved to allow FBHC to apply for Prop. 68 Funds on behalf of the District.

**Attachments:** Information on Master Plan for Calwa Park

**Recommended motion to be made by Board:** Update only

**For action by:**

District Board

**Regular Session:**

Consent Calendar

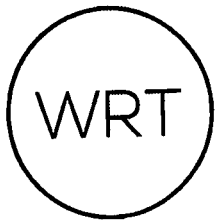
Regular Item

Public Hearing

**Review:**

**District Administrator  
(Initials Required)**

\_\_\_\_\_



December 20, 2019  
Sandra Celedon  
President & CEO  
Fresno Building Healthy Communities  
PO Box 7694  
Fresno, CA 93747

**Re: Calwa Park Master Plan | Proposal for Professional Services**

WRT and UDD have prepared this scope of work and cost proposal to complete master planning services for you and park district. We have discussed the approach with you over the past months and have tailored the team and services to provide you the best value.

Key aspects of the approach include:

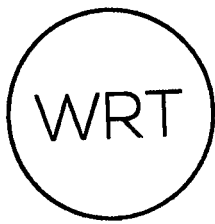
- WRT and UDD will jointly deliver the parks master plan. Sheila will serve as the project manager with WRT providing GIS analysis, engagement graphics, plan documentation, and operational cost calculation.
- NBS will provide high level park finance analysis in order to advise the District on options for increasing revenue to better meet the operating costs of the future.
- WRT and UDD will reduce costs by leveraging our previous work on the Fresno Parks Master Plan (mapping and GIS data).
- The Prop 68 grant process including the park design concepts and community input is the basis of the work ahead.

We look forward to your notice to proceed, initial steps in December, and official kick off meeting in January.

Sincerely,

John R. Gibbs, ASLA, LEED AP  
WRT Principal

CC: Shelia Hakimipour, UDD



## **SCOPE OF WORK**

### **1. Initiation (UDD, WRT)**

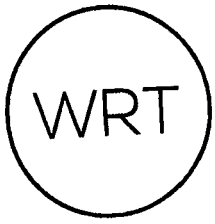
The project initiation consists of contracting, compilation of background information, file set up, and the items noted below.

- Kick off meeting and tour: WRT/UDD will lead a kick-off meeting in Fresno to review the scope of work, confirm meeting dates, and responsibilities of contributors to the project. We will also tour the park and review Prop 68 concepts. The District shall be prepared to discuss operations and programing.
- Stakeholder meetings: UDD will lead up to five stakeholder meetings that occur bundled over a one-day window. Some may be completed by phone. BHC and the District shall determine the stakeholders and provide contact information.
- Project management: UDD supported by WRT will manage the project schedule, communications, and accounting.

### **2. Needs Assessment (WRT, UDD)**

The needs assessment combines analysis mapping with outreach to determine the needs of the Calwa park community. The team will prepare mapping of typical park planning attributes for the Calwa Park District area within the Fresno context. WRT will build on data sets and mapping previously prepared for the City of Fresno when we conducted the Parks Master Plan. Where updated data can be easily retrieved, select updates will be made.

- GIS mapping of the service area of Calwa Park using GIS data we have available
- GIS mapping of Fresno to demonstrate value of Calwa to Fresno residents
- Condition assessment of Calwa park – The team will document the physical condition of assets in the park, supplemented by information provided by the District.
- Programs – document the recreation programs that are managed by Calwa using information provided by the District.
- Community Engagement Open House (1)
- Community Engagement Online Survey (1)
- Community Engagement Pop up (2)



3. Operations and Maintenance (WRT, UDD)
  - District to provide current spending on operations and maintenance (UDD)
  - Build spreadsheet and calculate operations, maintenance, and lifecycle costs (WRT)
  - Recommend and document new maintenance and operations strategies with District input.

4. Park Financing (NBS)

NBS will provide guidance in an advisory capacity to review materials and provide high level recommendations for strategies the District can consider to address future revenue targets. Recommendations may include a nexus study. They will attend one meeting in person, two additional meetings via the phone, prepare a draft memorandum of their findings, and deliver a final memorandum of their findings plus high level recommendations.

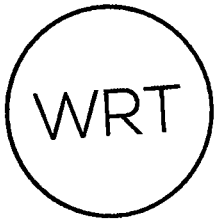
5. Calwa Park Master Plan (UDD, WRT)

WRT will finalize the park conceptual design with key amenities, priority, phasing, and location identified. Graphics will include a rendered site plan, a site section, and 3 perspective views. Precedent images will be used to help communicate park features and uses.

WRT will prepare a draft outline, admin draft, and final document using InDesign software. Deliverables will be PDF files transferred electronically. The document will be concise with the following sections likely:

- Introduction (including history of the park and District)
- Vision (what is our overall vision for the next 20 years)
- Recommendations (park CIP, costs, phasing/prioritization, recreation programming, finance)
- Appendix (needs assessment, community input)

WRT/UDD will support BHC to present the draft plan to the District Board in a study session.



## **SCHEDULE**

The project will be initiated in December of 2019 with contract completion by May of 2020. The attached schedule indicates the majority of the work occurs January to March 2020.

## **FEE**

The total cost of services described above will not exceed \$76,000. A detailed breakdown is attached. WRT will perform and invoice these services by task on a percent complete basis.



**CALWA PARK MASTER PLAN, COMBINED FEE BREAKDOWN BY SOURCE AND PHASE**  
 Decemembr 20, 2019

Prop 68 Grant	Total Hours	Total Charges	BHC Grant 1	Pro Bono Support	Prop 68 Reimbursable	Total Pre-prop 68 Fee
Task: Pre-Prop 68 Grant Design & Outreach Assistance to BHC						
WRT	107	\$14,875	\$4,500	\$2,000	\$8,375	\$ 14,875
UDD	72	\$10,800	\$3,500	\$1,500	\$5,800	\$ 10,800
			Total: \$8,000	Total: \$3,500	Total: \$14,175	\$ 25,675
			Invoiced in Sep 2019	No Invoice	Future Invoice	

Park Master Plan	WRT				UDD		Other Firms (NAS)	Team Total Fee
	Principal \$250/hr	Level III \$165/hr	Level I \$112/hr	WRT Total	Principal \$150/hr	UDD Total		
<b>Task 1: Initiation</b>								
1.1 Team Call	1				1			
1.2 GIS mapping of the service area of Calwa Park using GIS data we have available		4	16					
1.3 GIS mapping of Fresno to demonstrate value of Calwa to Fresno residents		4	16					
1.4 Kick off meeting and tour	8				6			
1.5 Condition assessment of Calwa park - documenting the physical condition of the park		3	4		4			
1.6 Programs - document the programs that are managed by Calwa		3	4		5			
1.7 Assist BHC with Stakeholder meetings		2	6		10			
1.8 Project Management		8			32			
<b>Task 1 Total hours</b>	<b>9</b>	<b>25</b>	<b>38</b>		<b>58</b>			<b>\$ 19,331.00</b>
<b>Task 1 Total Fee</b>	<b>\$ 2,250.00</b>	<b>\$ 4,125.00</b>	<b>\$ 4,256.00</b>		<b>\$ 8,700.00</b>	<b>\$ 8,700.00</b>		
<b>Task 2: Need Assessment</b>								
2.1 Review and refine Calwa park concept plan	4	4	6		4			
2.2 Community Open House - Prepare flyer, presentation materials, facilitating the meeting, assisting BHC with outreach efforts	8		20		8			
2.3 Assisting BHC Community Engagement Pop up			4		3			
<b>Task 2 Total hours</b>	<b>12</b>	<b>4</b>	<b>30</b>		<b>15</b>			<b>\$ 9,270.00</b>
<b>Task 2 Total Fee</b>	<b>\$ 3,000.00</b>	<b>\$ 660.00</b>	<b>\$ 3,360.00</b>		<b>\$ 2,250.00</b>	<b>\$ 2,250.00</b>		
<b>Task 3: Operation &amp; Maintenance</b>								
3.1 Review current O & M		1			1			
3.2 Build spreadsheet and calculate operations, maintenance, and lifecycle costs		2			20			
3.3 Recommend new maintenance and operations strategies		4			8			
<b>Task 3 Total hours</b>	<b>2</b>	<b>7</b>	<b>29</b>		<b>29</b>			<b>\$ 4,998.00</b>
<b>Task 3 Total Fee</b>	<b>\$ 1,750.00</b>	<b>\$ -</b>	<b>\$ 3,248.00</b>		<b>\$ 4,998.00</b>			
<b>Task 4: Park Financing</b>								
4.1 Review materials and provide high level recommendations for strategies to meet revenue targets.								\$ 18,000.00
4.2 Coordination					4			
<b>Task 4 Total hours</b>					<b>4</b>			<b>\$ 18,600.00</b>
<b>Task 4 Total Fee</b>					<b>\$ 600.00</b>	<b>\$ 600.00</b>	<b>\$ 18,000.00</b>	
<b>Task 5: Calwa Park Master Plan</b>								
5.1 Final park design	6	8	32					
5.2 Cost estimate	1	3	8					
5.4 Final Park master Plan Presentation to Calwa Board, including preparation					10			
5.3 Prepare outline, admin draft, and final document	4	16	8		50			
<b>Task 5 Total hours</b>	<b>11</b>	<b>27</b>	<b>48</b>		<b>60</b>			<b>\$ 21,581.00</b>
<b>Task 5 Total Fee</b>	<b>\$ 2,750.00</b>	<b>\$ 4,455.00</b>	<b>\$ 5,376.00</b>		<b>\$ 9,000.00</b>	<b>\$ 9,000.00</b>		
<b>Total project Fee</b>					<b>\$ 35,230.00</b>	<b>\$ 20,550.00</b>	<b>\$ 18,000.00</b>	<b>\$ 73,780.00</b>
<b>Total Estimated Expenses calculated at 3% of total cost</b>								<b>\$ 2,213.40</b>
<b>Calwa Park Master Plan Funding by BHC Grant 2</b>								<b>\$ 75,993.40</b>

Note on Task 4: NBS report will be an appendix in the doc. summarized in the main section of the doc

Prepared by WRT and UDD to track budget items by each project and funding source.  
 BHC Grant 1 is the portion of the BHC funded park master plan that is attributed to the prop 68 design and engagement tasks.  
 Pro Bono Support is the value of services provided by the consultant at no cost to BHC or Calwa Park District.  
 Prop 68 Reimbursable costs are services provided for engagement and design to support the grant that are to be reimbursed to BHC after the grant is won. BHC and the consultants share this risk as shown.  
 BHC Grant 2 is the BHC funded park master plan services provided by the consultant.

Pre-Prop68  
 WRT total hours= 107 / \$14,875  
 87.50%  
 WRT fee= \$4,500  
 UDD total hours= 72 / \$10,800  
 42.50%  
 UDD fee= \$3,500



CALWA PARK MASTER PLAN, OVERALL TIMELINE

20-Dec-19

Building Healthy Community

		December			January			February			March					
Tasks		W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12	W13	W14	W15
Task 1	Team call	*	H	H												
	Kick off meeting, Stakeholder Engagement, Site Tour ((WRT& UDD)				**											
	<b>Existing Condition Analysis:</b> Document the physical condition of the park - GIS mapping of Fresno and service area - Program documentation															
	Stakeholder meetings 5-8 (Need Assessment) (UDD)															
Task 2	Review and refine Calwa Park Concept plan - Prepare operation and maintenance cost and park financing															
	<b>Community Open House:</b> Report on prop 68 - present site analysis, need assessments and park design - present operation and maintenance analysis - present park financing recommendations (WRT & UDD)															
	Community Engagement Pop ups, 2-3 (UDD Assisting BHC)															
Task 5	Final Park Design - Cost Estimate															
	Preparing Draft Park Master Plan															
	Release of Draft PMP for public comment															
	Draft Park master Plan Presentation to Calwa Board (UDD)															
	Prepare outline, admin draft, and final document															

\* Time to call TBD for 3rd week of December

\*\* options for team kick off meeting and site tour are Wednesday Jan 15 or Friday January 17. BHC to recommend/choose.

\*\*\* February 21st

H Holiday

## RESOLUTION NO. 5

### **RESOLUTION OF THE BOARD OF DIRECTORS OF THE CALWA RECREATION AND PARK DISTRICT ADOPTING FINDINGS FOR A CATEGORICAL EXEMPTION RELATING TO PROPOSITION 68 GRANT APPLICATION**

**WHEREAS**, Calwa Recreation and Park District has submitted an application to the state for grant funding under Proposition 68; and

**WHEREAS**, staff has conducted an analysis under the California Environmental Quality Act (CEQA) of the project proposed for grant funding; and

**WHEREAS**, the Board of Directors has reviewed the analysis.

**NOW, THEREFORE**, the Board of Directors of the Calwa Recreation and Park District resolves as follows:

Section 1. The foregoing recitals are true and correct and are incorporated by reference.

Section 2. The Board adopts the following findings and determination regarding a categorical exemption under CEQA:

The District has performed a preliminary environmental assessment of this project, and the Board of Directors finds that it falls within the Categorical Exemption set forth in CEQA Guidelines Section 15301 (Existing Facilities), which exempts certain projects involving negligible expansion of existing of form use. This Categorical Exemption is applicable as the project consists of the repair, minor alteration, operation, alternation, etc., of the Calwa Park, which is an existing public facility, and which has been used for picnic areas, play areas, greenspace and landscape gardens (including shade trees), snack and food sales, fitness and exercise areas, walking and associated pathways and sidewalks. The project will also involve the repair of existing structures, such as the existing snack bar and renovation an existing historic rocket ship play structure. As such, the project merely involves the negligible expansion of existing or former uses. Further, none of the exceptions to Categorical Exemptions set forth in CEQA Guidelines Section 15300.2 apply to this project. As such, the Board of Directors adopts a Class 1 exemption under CEQA Guidelines Section 15301 for this project.

Section 3. District staff is directed to take all administrative actions necessary to file the categorical exemption as required by the State.

Section 4. This resolution shall be effective upon adoption.



CERTIFICATION

The foregoing Resolution No. 202-- \_\_\_\_ was adopted at a regular meeting on \_\_\_\_\_ 2020, by the following vote:

AYES:

\_\_\_\_\_

NOES:

\_\_\_\_\_

ABSTENTIONS:

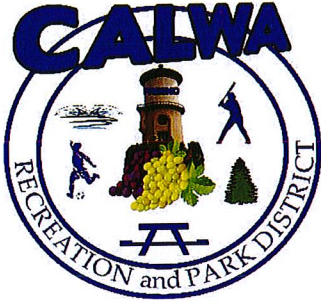
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ABSENCES:

\_\_\_\_\_

\_\_\_\_\_  
Secretary of the Board of Directors

# Calwa Recreation and Park District Agenda Item Transmittal



**Meeting Date:** January 21, 2020

**Agenda Item Number:** G-5

**Wording for Agenda:** Update on Retrofitting all Soccer Field Lights.

**Submitting:** District Administrator

**Contact Name and Phone Number:** Felix Ortiz  
559-264-6867

**Department Recommendation:** Update only

## Summary/Background:

I presented at the November 2019 meeting that switching the entire soccer light fixtures and replacing them with Linmore LED Site Lighter fixtures which includes a 10 - years warranty would cost approximately \$124,000.000

I'm currently working on filling out loan papers with PG&E with the help of Youran Kim of ClearResults of Oakland. Attached are the loan documents we will be filling out to bring back to the Board for loan review and to approve if we want to continue

By retrofitting the Calwa Recreation and Park District Soccer Lights, the District will reduce usage by approximately 75,160 kWh annually. This translates to approximately \$11,334 in annual savings. In addition to saving money, the fields will be brighter, safer, and more evenly illuminated.

**Prior Board Actions:** The Board asked District Administrator to move forward. Bring back loan agreement for approval.

**Attachments:** Loan Documents

## For action by:

District Board

## Regular Session:

Consent Calendar  
 Regular Item  
 Public Hearing

## Review:

**District Administrator  
(Initials Required)**

\_\_\_\_\_

**Recommended motion to be made by Board: Update only**

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# Financing Supplement to the Energy Efficiency Retrofit Program Application

The Energy Efficiency Retrofit Loan Program (the "Program") is funded by California utility customers and administered by Pacific Gas and Electric Company (PG&E) under the auspices of the California Public Utilities Commission (CPUC). The Program provides qualified PG&E customers with a means to finance energy-efficient (EE) retrofit projects implemented under select PG&E EE Programs (the "Qualified Program"). The loans issued under the Program are interest-free, unsecured loans to fully or partially reimburse qualified PG&E customers for the costs they incur in connection with a qualified retrofit project (the "Retrofit Project"), which term shall mean the energy efficiency retrofit project described in Customer's relevant Energy Efficiency Program Application.

- 1. Conditions for Eligibility:** Participation in the Program is limited to PG&E customers that meet the following conditions and satisfy these conditions throughout the duration of the Retrofit Project up to and including the date of Final Verification (defined below in Section 8): (a) the PG&E customer must be a business ("Commercial Customer") or a federal, state, county or local government agency ("Government Customer").\* Commercial Customers and Government Customers are collectively referred to as "Customer;" (b) Customer currently receives service from PG&E at the location of the Retrofit Project (the "Location"); (c) Customer has continually maintained an active PG&E account for the previous 24 months and has a minimum of 12 months of historical metered energy usage at Customer's current Location; (d) at the time the Customer's Program Application is Approved and Customer's Loan Agreement is executed, and at the time the loan is to be funded following completion of the Retrofit Project and satisfaction of all other requirements of the Loan Agreement, Customer must be in good credit standing, as determined by PG&E through credit review which may include a commercial credit check and a bill history review, which may be based upon the following and other criteria:
  - a. No 24-hour disconnection notices in the last 12 months;
  - b. No returned payments within the last 12 months;
  - c. No more than 1 payment arrangement in the last 12 months;
  - d. No broken payment arrangements within the last 12 months;
  - e. No deposit assessed within the last 12 months; and
  - f. The Retrofit Project qualifies and Customer is eligible for an incentive under the Qualified Program.

- 2. Loan Features:** The loans offered under the Program are interest-free (0%) and free of any fees, late payment penalties or other charges. The loan terms and conditions are set to provide simple payback from energy savings during the maximum allowed loan term, and are calculated by dividing the loan amount (eligible project cost less Qualified Program Incentives) by the estimated monthly energy savings resulting from the Retrofit Project. The ensuing number of monthly payments must not exceed the Maximum Loan Term set forth in chart below ("Loan Amount and Term Limitations").
- 3. Eligibility:** Prior to purchasing and installing any energy-efficient measures or equipment under the Qualified Program, Customer must satisfy the eligibility requirements of both the Program and Qualified Program. Because energy efficiency projects in progress are ineligible under the Program, Customer must have an inspection of the Retrofit Project and Location conducted and completed by PG&E before commencing any work or purchasing any equipment for the Retrofit Project.
- 4. Inspection:** PG&E will assist Customers in understanding the energy efficiency measures available under the Qualified Program and will answer their questions concerning this Program. After Customer has decided upon the measures that comprise the Retrofit Project, PG&E will request an engineering review, perform an inspection of the Location, calculate the Loan Terms and prepare the Loan Documents. Thereafter, PG&E will provide Customer with a copy of the inspection report, a Loan Agreement, the Application, the applicable On-Bill Financing (OBF) Gas and/or Electric Rate Schedule and Loan Calculation Summary Sheet (collectively, the "Loan Documents").
- 5. Loan Documents:** If the terms of the loan are acceptable, Customer shall execute the Loan Documents and return them to PG&E prior to the commencement of the Retrofit Project. Incomplete or incorrect applications cannot be processed and may result in the delay of PG&E's approval and possible disqualification from the Program. Customer may withdraw this Application for any reason without penalty by sending written notice to PG&E.
- 6. Customer's Responsibilities for Contractor and Vendor:** Upon PG&E's notification to Customer that the Retrofit Project is eligible for the Program, Customer may begin the Retrofit Project pursuant to the contract agreed upon by Customer, its contractor or vendor. PG&E does not endorse or recommend any particular contractor or vendor nor does PG&E review any contractor or vendor proposals. Rather, Customer shall be solely responsible for reviewing the feasibility of the contractor's and vendor's proposal(s) and verifying their respective qualifications, pricing, energy savings, warranties and the terms and conditions of the contractor's and/or vendor's contract with Customer.

**Loan Amount and Term Limitations**

Interest	0%, with no additional fees or charges
Minimum Loan Amount	\$5,000
Maximum Loan Amount	\$250,000 (up to \$4,000,000 with approved exception)
Maximum Loan Term, not to exceed the Expected Useful Life (EUL) of the measures	120 months

\*Residential customers are ineligible.



- 7. PG&E Disclaimers:** CUSTOMER'S DESIGN OF THE RETROFIT PROJECT AND SELECTION AND USE OF ENERGY EFFICIENCY EQUIPMENT, MEASURES AND SELECTION OF CONTRACTORS AND VENDORS IS AT CUSTOMER'S SOLE DISCRETION AND AT CUSTOMER'S SOLE RISK. TO THE EXTENT PERMITTED BY APPLICABLE LAW, PG&E EXPRESSLY AND SPECIFICALLY DISCLAIMS ANY LIABILITY IN RESPECT OF ANY ADVICE, INFORMATION OR OTHER INSTRUCTION PROVIDED BY OR ON BEHALF OF PG&E TO CUSTOMER IN CONNECTION WITH THE QUALIFIED PROGRAM, PROGRAM OR RETROFIT PROJECT. PG&E DOES NOT WARRANT OR BEAR ANY RESPONSIBILITY FOR ANY OF THE FOLLOWING:
- a. THE WORK PERFORMED BY CUSTOMER'S CONTRACTOR(S) OR VENDOR(S), THAT THE RETROFIT PROJECT IS APPROPRIATE FOR THE LOCATION;
  - b. THE RETROFIT WILL RESULT IN OR YIELD ANY ENERGY EFFICIENCY SAVINGS OR A SPECIFIC AMOUNT OF ENERGY EFFICIENCY SAVINGS OR OTHER REDUCTION IN CUSTOMER'S PG&E UTILITY BILL AFTER COMPLETION OF THE RETROFIT PROJECT;
  - c. THE CONTRACTOR'S OR VENDOR'S SERVICES WILL BE TIMELY, COMPLETE OR ERROR-FREE, OR THAT DEFECTS IN THE RETROFIT PROJECT WILL BE CORRECTED BY SUCH INDIVIDUALS;
  - d. ANY ERRORS, OMISSIONS, DEFECTS OR DELAYS IN THE DESIGN OR CONSTRUCTION OF THE RETROFIT PROJECT OR THE OPERATION OF ANY ENERGY EFFICIENCY MEASURES INSTALLED AT THE LOCATION.
- 8. Verification:** Upon completion of the Retrofit Project, Customer shall request PG&E's post-completion inspection and final verification that the Retrofit Project has been completed in conformity with the requirements of the Qualified Program and that customer remains eligible (the "Final Verification").
- a. If there has been any change to the Retrofit Project's scope, cost and/or incentives available under the Qualified Program or energy savings, Customer will be required to enter into a Loan Modification Agreement with PG&E, which may include new contract terms reflecting the changes in the Retrofit Project. (If a Loan Modification Agreement is required, it shall be deemed part of the "Loan Documents.")
- b. If the changes to the Retrofit Project are such that it no longer meets the Program's payback criteria or other conditions, the Retrofit Project will be considered ineligible, the Loan Agreement will be terminated and no loan proceeds will be disbursed.
  - c. IF PG&E DETERMINES, IN ITS ABSOLUTE DISCRETION, THAT CUSTOMER'S CREDIT HAS DETERIORATED OR HAS OTHERWISE PLACED CUSTOMER'S REPAYMENT OF THE LOAN AT RISK, THE LOAN PROCEEDS SHALL NOT BE ISSUED, EVEN THOUGH THE RETROFIT PROJECT MAY HAVE BEEN SATISFACTORILY COMPLETED AT CUSTOMER'S EXPENSE.
- 9. Disbursements:** Subject to and following PG&E's satisfactory Final Verification, an incentive check and the loan proceeds will be issued to Customer or, at Customer's written direction, to Customer's contractor or vendor.
- 10. General Provisions:**
- a. Applications for loans under the Program will be accepted from qualified Customers on a first-come, first-served basis until the funds allocated by PG&E for the Program are no longer available. The Program may be modified or terminated by the CPUC or PG&E at any time and without prior notice. However, termination of the Program following execution of a Loan Agreement by Customer will not affect that Loan Agreement, or, if Customer thereafter satisfies all Program conditions, the disbursement.
  - b. The loan proceeds may only be used to pay or reimburse Customer for implementing or installing energy-efficient measures or equipment through the Qualified Program.
  - c. If there is any conflict between the terms of any document relating to the Program, the Loan Documents shall control.
  - d. For all retrofit projects, including but not limited to streetlight, HVAC and lighting retrofits, Customer acknowledges and understands that Customer is able to use the installation vendor or contractor of their choice.
  - e. The customer confirms that the OBF loan funds are required for the project to be completed, and that without the loan funds the project would not otherwise be able to be completed with the same scope or within the same time-frame.

I have read, understand and agree to all of the Energy Efficiency Retrofit Loan Program requirements and terms and conditions set forth in this Program description. I understand that loan calculations will be based on pre-inspection results and on the applicable program documentation, and that my agency/company must meet all eligibility criteria and requirements in order to participate in the Program. Any unapproved changes to project scope, costs or run hours, or to my agency's/company's creditworthiness, between the time the Loan Documents are accepted and signed and the Retrofit Project is completed and the project's and my agency's/company's continued eligibility are verified, could result in loan ineligibility.

Legal Name of Business (i.e., the formal name on your tax return)

Authorized Representative's Printed Name

Authorized Representative's Signature

Title

Date

Tax identification information (select one):

Federal Tax ID Number: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

**FOR PG&E USE ONLY:**

PG&E OBF Administrator

Printed Name

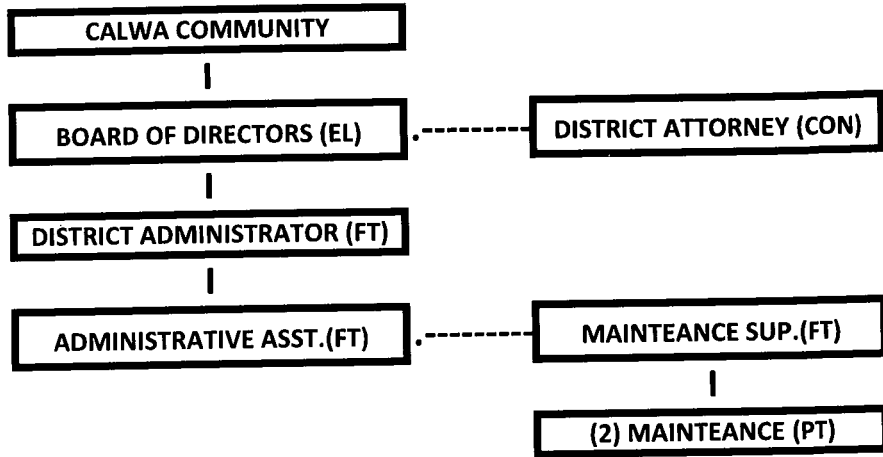
Date

Retrofit Program Application Number

OBF Application Number

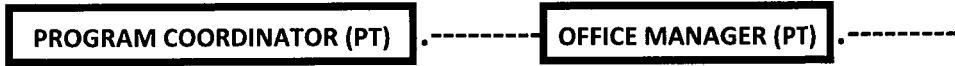


2020



EL = ELECTED  
CON = CONTRACTED  
FT = FULL TIME  
PT = PART TIME

**ORGANIZATION CHART  
CALWA REC. & PARK DISTRICT**



## **Calwa Recreation and Park District Job Description**

**JOB TITLE:**           **DISTRICT ADMINISTRATOR**

### **BASIC FUNCTION:**

Under administrative direction of the Calwa Recreation and Park Board of Directors, plans, organizes, coordinates and directs the programs and activities of the Districts; formulates departmental policies, goals, and directives; provides expert professional assistance to District staff on community services matters; performs related work as assigned.

### **DISTINGUISHING CHARACTERISTICS:**

This at-will, single position class has district level responsibility for overall policy development, program planning, fiscal management and operation of the Calwa Recreation and Park District as well as special projects as assigned. The incumbent is responsible for developing and implementing district goals, objectives and work standards in addition to furthering district's goals and objectives.

### **EXAMPLES OF DUTIES AND KEY RESPONSIBILITIES:**

- Develop and direct the implementation of goals, objectives, work standards and district administrative policies and procedures; prepare and administer the district's budget.
- Plan, organize, coordinate and direct, in some cases through subordinate supervisors, all community services functions of the District.
- Work closely with the Board members and a variety of public and private organizations in developing programs and implementing projects to solve problems related to district issues.
- Make final interpretations of district regulations and codes and applicable laws and provides technical assistance to staff and board members.
- Determine priorities, review staff work and direct the development of management systems to evaluate policies and operating procedures for overall effectiveness.
- Confer with and give guidance to the Board members regarding matters affecting employer-employee relations; provide for the election, work review and professional development of staff.
- Coordinate the formulation of long-range planning, including financial and capital improvement plans for the District.
- Represent the District in meetings with public officials, other public agencies and civic groups in order to coordinate, develop and implement projects and programs.
- Assist with the review of claims for damages filed against the District and coordinate investigation of claims and communication with risk management joint powers authority and other involved individuals and agencies.
- Direct the preparation of and personally prepares a variety of complex administrative and technical reports; directs the maintenance of district records.
- Monitor developments related to the delegated service area evaluates their impact on District operations and implements policy and procedure improvements.
- Evaluate and improve operations to minimize the cost to the Budget.



- Develop and monitor recreational program offerings made available to the community.
- Participate in the District's planning and community development processes, including coordination of building inspection and permitting activities, which may be contracted out to other individuals or agencies.
- Enhance the District's conservation efforts, i.e. energy and water
- Identify alternatives for service delivery including outsourcing and private sector partnerships.
- Establish and monitor performance standards for the district.

#### REPORTING RELATIONSHIPS:

This position reports to the Calwa Board of Directors and directly or indirectly supervises all of the District's employees.

#### **QUALIFICATIONS/REQUIREMENTS:**

Desirable Qualifications:

Knowledge of:

- Administrative principles and methods, including goal setting, program, and budget development, and implementation and employee relations.
- Principles and practices of municipal community services administration including park design/construction/maintenance, recreation programs, and activities, risk management, claims administration and other assigned topic areas.
- Applicable city, state and federal laws, guidelines and standards.
- Principles and practices of budget development and administration.
- Principles of business computer user applications.

Skill in:

- Planning, organizing, administering and coordinating a variety of large and complex community services/community development programs and services.
- Planning, organizing, assigning, directing, reviewing and evaluating the work of assigned staff.
- Selecting, motivating and evaluating staff and providing for their training and professional development.
- Developing and implementing goals, objectives, policies, procedures, work standards and internal controls.

Ability to:

- Analyze complex technical and administrative community service problems, evaluating alternative solutions and adopting effective courses of action.
- Prepare clear and concise reports, correspondence and other written materials.
- Establish and maintain cooperative working relationships with a variety of citizens, public and private organizations, boards and District staff.
- Exercise sound independent judgment within general policy guidelines.

**Experience and Education:**

Any combination equivalent to experience and education that could likely provide the required knowledge, skill and ability is qualifying. A typical way to obtain the knowledge, skill and abilities would be:

- Equivalent to graduation from a four-year college or university with major coursework in Parks and Recreation, Public Administration, Business Administration is desired.
- Four years of supervisory or administrative experience in a major community services/community development setting which has included program planning, development and administration.

**Special Requirements:**

- Possession of or ability to obtain a valid California driver's license by time of appointment

**Physical Standards:**

Positions in this class are typically situated in a standard office environment, though supervision of personnel and various work-related activities may result in exposure to the weather, potentially harmful substances and dangerous equipment, and could occasionally require somewhat strenuous physical activity.

**Calwa Recreation and Park District  
Job Description**

**JOB TITLE:**            **ADMINISTRATIVE ASSISTANT**

**BASIC FUNCTION:**

Under the general supervision of the District Administrator, performs a variety of responsible and complex clerical, secretarial, and administrative duties of the District. This classification requires employees to have administrative and clerical skills, financial record-keeping skills, work independently within a supervised framework of established and standardized policies and procedures and perform the full range of administrative, accounting and clerical duties.

**EXAMPLES OF DUTIES AND KEY RESPONSIBILITIES:**

- Performs detailed administrative and record-keeping work
- Maintains a variety of files and records of information
- Provides administrative support to District employees
- Assists the public at the counter and answers telephone inquiries
- Responds to a variety of inquiries and provides information
- Receives and processes payments and accounts receivable
- Makes appointments and arranges meetings
- Gathers, organizes and prepares information for monthly agenda
- Maintains records and submits for deposit cash received
- Performs a variety of general clerical duties including typing, filing and ordering supplies
- Assists with various Recreation program administrative tasks
- Assists in the preparation of District payroll
- Coordinates District special projects as assigned
- Enters information on computer terminals and accounting system
- Researches minor problem accounts and works with customers to resolve issues
- Responsible for the efficient operation of the district's clerical office
- Performs related duties as required

**QUALIFICATIONS/REQUIREMENTS:**

**Knowledge, Skills and Abilities:**

- Administrative and clerical techniques, practices and procedures
- Modern office methods, procedures, equipment, and business letter writing
- Accounting and financial recordkeeping techniques, practices and procedures
- Basic Mathematics and research methods
- Clerical accounting methods, forms, and techniques
- Customer account reconciliation and research methods
- Operate computer utilizing a variety of software including word processing and spreadsheet applications
- Follow oral and written directions
- Operate regular office equipment including calculator, typewriter, copy machines
- Type at a rate of speed sufficient to meet the requirements of the position.

- Develop and maintain effective working relationships with the public, elected officials, co-workers, and other District employees
- Work independently exercising effective judgment and decision making skills
- Understand and interpret applicable ordinances, regulations, procedures and District policies
- Provide effective customer service in a tactful and courteous manner
- Communicate effectively in written and oral form
- Perform various financial and statistical recordkeeping duties

### **PHYSICAL DEMANDS/WORK ENVIRONMENT**

- Frequently sit, often for extended periods of time;
- Occasionally stand, walk, climb or balance, stoop, kneel, crouch, or crawl;
- Use hands to handle or operate tools, or controls, with dexterity and fine motor skills;
- Reach with hands and arms, frequently at levels above the shoulders and below the waist/knees;
- Occasionally lift and/or move more than 25 pounds;
- Talk and/or hear – face-to-face and on the telephone;
- Vision abilities include close, distance and peripheral vision, depth perception, and the ability to adjust focus.
- Occasionally work in outside weather conditions;
- The noise level is usually quiet to moderately noisy.

### **Experience and Education:**

Any combination equivalent to experience and education that could likely provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the knowledge, skills, and abilities would be:

- Three (3) years of increasingly responsible administrative, clerical and/or accounting experience.
- College-level administrative, business and/or recordkeeping courses; minimum: graduation from high school or GED

### **Special Requirements:**

- Possession of or ability to obtain a valid California driver's license by time of appointment



**Calwa Recreation and Park District  
Job Description**

**JOB TITLE:            ACCOUNTING/OFFICE MANAGER**

**BASIC FUNCTION:**

Under general supervision of the District Administrator, performs accounting, clerical and record-keeping activities relating to finance/accounting, and other assigned areas. This classification requires employees to have financial record-keeping skills, work independently within a supervised framework of established and standardized policies and procedures and perform a full range of accounting and clerical duties.

**EXAMPLES OF DUTIES AND KEY RESPONSIBILITIES:**

- Assists the public at the counter and answers telephone inquiries
- Performs detailed accounting and record-keeping work
- Responds to a variety of inquiries and provides information
- Maintains records and account information
- Posts customer payments to proper account
- Verifies accuracy of payments, including researching minor discrepancies and processes payments for check writing
- Researches minor problem accounts and works with customers to ensure payments on a timely basis
- Balances receipt transactions and prepare deposits
- Receives and processes payments and accounts receivable
- Assists with payroll and accounts payable processes as needed
- Maintains and reconciles a variety of records and reports
- Examines and corrects accounting transactions to ensure accuracy
- Performs a variety of general clerical duties including typing, maintaining files and records, and ordering supplies
- Inputs and reviews statistical reports
- Enters information on computer terminals and utilizes the District's accounting system
- Performs related duties as required

**QUALIFICATIONS/REQUIREMENTS:**

**Knowledge, Skills and Abilities:**

- Accounting and financial recordkeeping techniques, practices and procedures
- Basic mathematics
- Statistical report preparation
- Research methods
- Clerical accounting methods, forms, and techniques
- Customer account reconciliation and research methods
- Operate computer utilizing a variety of software including word processing and spreadsheet application
- Follow oral and written directions

- Operate standard office equipment including calculator, typewriter, copy machines, etc.
- Develop and maintain effective working relationships with public, elected officials, co-workers, and other District employees
- Work independently exercising effective judgment and decision-making skills
- Understand and interpret applicable ordinances, regulations, procedures, laws, and District policies
- Provide effective customer service in a tactful and courteous manner
- Communicate effectively in written and oral form
- Perform various financial and statistical recordkeeping duties

**Experience and Education:**

Any combination equivalent to experience and education that could likely provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the knowledge, skills, and abilities would be:

- Three (3) years of increasingly responsible accounting and clerical experience
- College level accounting and/or recordkeeping courses; minimum: graduation from high school or GED
- Desirable: Accounting and/or finance experience

**Special Requirements:**

- Possession of or ability to obtain a valid California driver's license by time of appointment

**Physical Standards:**

Positions in this class are typically situated in a standard office environment resulting in little exposure to the weather and requiring no unusual physical abilities.

**Calwa Recreation and Park District  
Job Description**

**JOB TITLE:**           **PROGRAM COORDINATOR**

**BASIC FUNCTION:**

Under the direction of the District Administrator, develops, plans, organizes, coordinates, and supervises community and recreation programs for a wide range of activities for adults, elementary, junior and high school age boys, and girls. This position may provide technical staff assistance in the field of community and recreation programming and may be required to work nights, weekends, and certain holidays. This classification requires employees to work independently within a supervised framework of established and standardized policies and procedures and may at the time; work other duties for the District Administrator.

**EXAMPLES OF DUTIES AND KEY RESPONSIBILITIES:**

- Develop, plan, organize, implement, and evaluate a variety of community services and recreation programs, including special events and contract services.
- Establish schedules and methods for providing recreation services; identify resource needs; review needs with appropriate management staff; allocate resources accordingly.
- Participate in the development of goals and objectives as well as policies and procedures; participate in the implementation of approved policies and procedures; monitor work activities to ensure compliance with established policies and procedures.
- Prepare community events and recreation publicity; coordinate referral systems and the publication of seasonal brochures; coordinate the dissemination of recreation and community service publicity.
- Identify community needs and recommend appropriate programs related to the findings.
- Prepare periodic reports; maintain files and records.
- Conduct and supervise special events; develop contracts and hire contracted instructors.
- Maintain and design an online recreation registration program; process reservation requests for Calwa Park and other District-owned facilities.
- Serve as staff liaison on various City recreation or community-related committees and subcommittees as assigned by the District Administrator.
- Prepare purchase requisitions; order supplies and materials.
- Participate in the selection of part-time recreation staff; provide or coordinate staff training; work with employees to correct deficiencies; implement discipline procedures.
- Participate in the preparation and administration of the recreation program budget; submit budget recommendations; monitor expenditures.
- Respond to complaints and requests for information.
- Coordinate community services activity programs with other organizations, outside agencies, and service providers.
- Coordinate the reservation of other facilities which we can take advantage of using.
- Meet with public groups, clubs, organizations, and agencies to explain and promote community services, activities, and programs to encourage community participation.
- Assists the public at the counter and answers telephone inquiries.

- Performs related duties as required.

## **QUALIFICATIONS/REQUIREMENTS:**

### **Knowledge, Skills and Abilities:**

- Methods, techniques, principles, and procedures used in the planning, development, and administration of community service programs.
- Common recreational and social needs of various age groups, Principles of supervision, training, and performance evaluation.
- Principles and procedures for implementing and directing a wide variety of community services activities.
- Principles and practices of budget development.
- Office procedures, methods, and equipment including computers and applicable software applications such as word processing, spreadsheets, and databases.
- Develop and administer a community services and recreation programs suited to the needs of the community.
- Plan, organize, coordinate, and direct the development and implementation of community services program.
- Analyze, interpret, and explain section policies and procedures.
- Supervise, train, and evaluate seasonal employees and volunteers.
- Operate office equipment including computers and supporting word processing, spreadsheet, and database applications.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.

### **PHYSICAL DEMANDS/WORK ENVIRONMENT**

- Frequently sit, often for extended periods of time;
- Occasionally stand, walk, climb or balance, stoop, kneel, crouch, or crawl;
- Use hands to handle or operate tools, or controls, with dexterity and fine motor skills;
- Reach with hands and arms, frequently at levels above the shoulders and below the waist/knees;
- Occasionally lift and/or move more than 25 pounds;
- Talk and/or hear – face-to-face and on the telephone;
- Vision abilities include close, distance and peripheral vision, depth perception, and the ability to adjust focus.
- Occasionally work in outside weather conditions;
- The noise level is usually quiet to moderately noisy.

### **Experience and Education:**

Any combination equivalent to experience and education that could likely provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the knowledge, skills, and abilities would be:

- Five years of increasingly responsible community service or recreational program administration experience or
- Two years of experience and working on a bachelor's degree in Recreation Administration.



**Special Requirements:**

- Possession of or ability to obtain a valid California driver's license by time of appointment.
- Possession of, or ability to obtain, an appropriate, valid C.P.R. Certificate.
- Job-related physical must be completed and submitted prior to commencement of work.

**Calwa Recreation and Park District  
Job Description**

**JOB TITLE:**           **MAINTENANCE SUPERVISOR**

**BASIC FUNCTION:**

Under general supervision, performs a wide variety of semi-skilled and skilled duties in maintenance, repairs, improvements of Calwa Park and Calwa Park facilities, and performs related work as required

This is the supervision level class in the Parks Maintenance Worker series for positions in the Park District. Positions allocated to this class are distinguished by the assignment of duties which require incumbents to have a full range of maintenance experience enabling them to perform independently or with minimal supervision, and to perform the more difficult tasks which require greater skills

**EXAMPLES OF DUTIES AND KEY RESPONSIBILITIES:**

- Supervise 4 to 6 part-time employees
- Schedule employees work week
- Drives, loads and unloads cars or trucks
- Paints parking stalls
- Installs and replaces signs
- Maintains and repairs equipment
- Builds sidewalks
- Mows, edges, trims and waters lawns
- Trims shrubs
- Cultivates and fertilizes lawns and plants
- Sprays weeds
- Trims park trees from ground and ladder using power and hand saws
- Cleans and cares for equipment

**QUALIFICATIONS/REQUIREMENTS:**

**Knowledge, Skills and Abilities:**

- Knowledge of most of the tasks and methods of park maintenance
- Ability to supervise employees
- Ability to schedule employees work schedule
- Ability to lift and carry heavy articles - 50 lbs
- Ability and skill in operation of machinery and equipment used
- Ability and willingness to follow oral and written instruct

**Experience and Education:**

At least high school; preferably at least two years of work experience in maintenance, construction, farm or similar work which required operation of machinery or equipment similar to work of this position

Qualifying experience may be substituted for education on a year to year basis or completion of sufficient education to assure the ability to read and write English at a level required for successful job performance

**Special Requirements:**

- Possession of or ability to obtain a valid California driver's license by time of appointment

**Physical Standards:**

Positions in this class are typically assigned to an outdoor environment resulting in exposure to the weather and requiring the ability to perform heavy labor in a variety of conditions

**Calwa Recreation and Park District  
Job Description**

**JOB TITLE:**           **MAINTENANCE EMPLOYEE**

**BASIC FUNCTION:**

Under the supervision of the Maintenance Supervisor, performs a variety of unskilled, semi-skilled, and occasionally skilled tasks in maintenance, repair, and improvement of Calwa Park and park facilities: performs routine maintenance work associated with parks ( mowing, edging, pruning, etc... ) and facilities ( sweep, mop, clean restrooms, etc...); does other tasks as directed from the Maint. Supervisor.

**EXAMPLES OF DUTIES AND KEY RESPONSIBILITIES:**

- May assists in building forms for curbs, sidewalks, and related construction.
- May assist in pouring and finishing concrete.
- May assist in repairing gopher holes, and potholes in the parking lot.
- May paint parking lot stripes
- May repair and erect signs and lights.
- May paint facilities such as restrooms, halls, etc...
- May operate equipment such as tractor, fork-lift, mowers, and jackhammer, etc...
- Performs related duties as required.

**QUALIFICATIONS/REQUIREMENTS:**

**Knowledge, Skills and Abilities:**

- Knowledge of using and handling in a safe manner, tools and equipment used in general construction and maintenance work.
- Ability to learn to perform a variety of semiskilled and unskilled tasks in the maintenance of parks, and other facilities (hall).
- Ability to use hand and power tools required in general maintenance.
- Perform heavy manual labor.
- Understand and carry out oral and written instructions.
- Ability to maintain an effective working relationship with those contacted in the course of work.
- Develop and maintain effective working relationships with the public, elected officials, co-workers, and other District employees
- Work independently exercising effective judgment and decision making skills

**WORK ENVIRONMENT**

- The employee frequently works on or near heavy machinery, power tools/equipment, and moving mechanical parts;
- Frequently must sit, stand, balance, climb, bend, stoop, crouch, crawl, and walk;
- Frequently must reach, grasp, and manipulate with rough and fine motor skills and coordination;
- Frequently must reach and grasp at levels above the shoulder and below the waist/knees;
- Must be able to talk and hear, occasionally in noisy conditions;

- Frequently must lift and/or move items more than 25 pounds, and items more than 100 pounds with some regularity;
- Vision abilities include close, distance and peripheral vision, depth perceptions, and the ability to adjust focus.
- Must be able to move quickly and with appropriate balance and dexterity to avoid hazards;
- Occasionally works in high, precarious places;
- The employee frequently works in outside weather conditions.
- Is occasionally exposed to wet and/or humid conditions, fumes or airborne particles, toxic or caustic chemicals,
- Extreme cold, extreme heat, and vibration.
- The noise level in the work environment is usually moderate, with occasional high noise levels.
- The duties listed above are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position.

**Experience and Education:**

- Graduation from high school or attainment of G.E.D.
- Qualifying experience may be substituted for education on a year to year basis or completion of sufficient education to assure the ability to read and write English at a level required for successful job performance.

**Special Requirements:**

- Possession of or ability to obtain a valid California driver's license by time of appointment.
- Completion of job-related physical upon offer of employment.