



**HEATHER GLEN COMMUNITY SERVICES DISTRICT
QUARTERLY ADMINISTRATIVE REPORT – Q2 2026**

June 22, 2026

Rachel Rose, General Manager & Board Secretary

TOPICS OF INTEREST

.Gov Project Update: New HGCSD Website

During Q2, the District worked with Streamline to design and implement a new HGCSD website focused on compliance, transparency, and improved public access to District information. Streamline is widely used by special districts and provides tools designed to support required public postings, document access, and website compliance.

As of June 16, 2026, the domain transfer to the new website was initiated, and by June 22, 2026, the new website was live. The District's website address remains HGCSD.net at this time.

The District's .gov domain process is also underway. New .gov applications were not being accepted until late May, and the application review and approval process may take several weeks. Once the .gov domain is approved, Streamline will be able to transition the website to the new address and redirect users from the current .net address to avoid interruption in public access.

After the .gov domain is active, District documentation can be updated to reflect the new website address, and the District can proceed with setting up Google Workspace to provide dedicated District email addresses for Board and District use.

Q3 Billing, Email Bill Delivery, and Contact Information Verification

In an effort to reduce administrative operating costs and improve District communication, the District will send customers a contact information verification form in Q3. The form will allow customers to confirm current contact details and provide an opportunity to opt out of email bill delivery.

Once the verification process is complete, the District plans to move forward with email bill delivery as the default method for monthly invoicing. Updated contact information will also support the creation of an emergency phone tree for District-related emergency communications.

Property Sales and Escrow Requests: Process Improvement Need

The District supported five property transactions during Q2. These transactions required multiple escrow documentation requests, account updates, shifting escrow timelines, District form follow-up, non-cycle meter readings, and manual final invoice preparation.



The current process is administratively time-intensive, particularly when requests are submitted shortly before closing or when escrow dates change multiple times. Property owners and escrow representatives are not always providing timely notice or following the Property Sale Requirements outlined in Section 5200.6.1 of the District's Water Service & Collections Policy.

The District may wish to review whether the account transfer process should be clarified or strengthened, including whether additional fees should apply for non-standard processing, repeated document requests, off-cycle meter reads, or manual final billing associated with property transfers.

Water Conservation and Water System Processing

In May, the District issued its first water conservation notices of the summer season in connection with impacted dates related to PCWA canal closures. With the start of consistent warmer weather, additional conservation measures may be needed during the coming months.

Water conservation days will be posted on the District bulletin board and website, and notices will be sent to customers by email when applicable.

Customers should also be aware that additional water system processing steps may occur during the summer months, including hydrant flushing or bleeding as needed to support water system operations.

District Certifications, Training Requirements, and Continuing Education

As presented by CSDA at the March 2026 quarterly Board meeting, SB 827 is a new 2026 bill that expands mandatory AB 1234 ethics training requirements and introduces a new fiscal and financial training requirement for local agencies. These trainings are expected to be required every two years and are available through the District's CSDA membership.

The General Manager is also interested in pursuing additional special district management coursework and certification opportunities, including SDLF/CSDM-related training, as appropriate for the District's needs.

Ongoing Policy Development

Policy development and review continued during Q2. Work this quarter included edits and updates related to the following:

- Contractors and Consultants Policy
- Water Service & Collections Policy
- Finance Management and Internal Controls Policy
- Investment of District Funds Policy

There are additional policies recommended for special districts by Streamline and CSDA that should be reviewed for possible future adoption. HGCSO-specific policies are also expected to be brought forward in the next quarter, including a proposed policy related to sewage pumps.



PROJECTS BY STATUS

Completed *Highlights only. Full task details are reflected in monthly invoices.*

Streamline Website Implementation – Completed migration to Streamline as part of the District's transition to a more compliant and transparent website platform. This project included multiple months of meetings, design work, training, website building, document organization, and vendor coordination.

SMI Contact List – Developed and updated fiber interest/contact tracking.

Election Services Setup – Coordinated with Placer County offices to confirm and support election services for the 2026 Board Member elections.

Finance Operations Group and 2026–2027 Budget Ad Hoc Committee Support – Coordinated and supported finance-related meetings, budget review, and related administrative preparation.

Public Records Requests – Completed two large public records requests during Q2.

Board-Directed Research and Administrative Support – Completed various Board-directed research, analysis, and administrative tasks.

In Progress

Property Transfer and Escrow Support – Providing coordination, documentation, account review, and billing support for property transactions within the District.

Finance Support – Ongoing finance-related administrative support, including:

- Vendor and customer invoice processing, tracking, and filing
- QuickBooks administrative and technical support
- Support requests, including former employee tax questions and account credit research
- Accounts receivable research, collections tracking, and reporting
- Preparation and formatting of financial reports for public posting
- Budget review and preliminary budget drafting

Approved Contractor Contact List – Developing a centralized, Board-approved vendor and contractor directory.

HGE Property Files and Liens – Continuing account and property file review, including:

- Active lien processing for delinquent accounts
- Research into historical lien status where release documentation is incomplete or unavailable

District Policies and Rules Handbook – Continuing policy organization and development.

- 16 policies are currently adopted
- 8 policies are currently in development
- Policies are being published in accordance with transparency requirements
- A consolidated handbook will be issued after completion, with updates made as needed



District Calendar – Developing a shared calendar for recurring District obligations, compliance deadlines, meetings, and administrative tracking.

Proposed Projects for Q3

District Contacts Import and Emergency Contact Tree – After customer contact verification forms are received, account information will be updated across District systems. The updated contact information will also be used to create an emergency contact tree for District-related communications.

Google Workspace Implementation and Training – Following approval and setup of the District's .gov domain, the District can proceed with Google Workspace implementation for dedicated District email addresses and improved document management. Board training can be provided for Gmail, Drive, Docs, Sheets, Calendar, and related tools to support adoption and consistent records management practices.

Records and Archive Digitization – After receiving additional guidance on best practices from Streamline, the District's approach to digitization and archive organization has shifted toward prioritizing long-term structure, accessibility, and compliance. Ongoing work may include:

- Organization and restructuring of Google Drive files
- Scanning and digitization of historical records, maps, and reference materials
- Incorporation of physical records from multiple storage locations
- Establishing a standardized structure for long-term records management and public access

CLOSING

Thank you for your continued support. I remain focused on advancing District priorities, improving administrative systems, and supporting the Board's direction. I welcome any questions, feedback, or discussion regarding current projects and next steps.

