



HEATHER GLEN COMMUNITY SERVICES DISTRICT QUARTERLY ADMINISTRATIVE REPORT – Q3 2026

September 21, 2026

Rachel Rose, General Manager & Board Secretary

TOPICS OF INTEREST

Board & Governance Administration

Following a Director resignation in August, the District initiated the required vacancy process, including preparation and posting of the vacancy notice, coordination with the Placer County Elections Office, updates to the District's Statement of Facts – Roster of Public Agencies (SF-405), Form 700 records, and related District access and records. The vacancy is scheduled for Board consideration at the September 24, 2026 Regular Meeting.

The District also submitted its Biennial Agency Conflict of Interest Code Review to Placer County during the quarter. The County's determination is pending. Once the County confirms the required scope and designated positions, the District will prepare and adopt a public Conflict of Interest Code policy consistent with the County's determination and applicable requirements.

Ongoing Policy Development

Policy development and review continued during Q3, including two new policies and amendments to three existing policies based on Streamline's recommendations for California compliance:

- **Reimbursement and Compensation Policy – New:** Establishes requirements for authorized expenses and reimbursements, including approval, documentation, allowable expenses, mileage, and required reporting and disclosure.
- **California Public Records Act Policy and Procedures – New:** Establishes a consistent process for receiving and responding to Public Records Act requests, including response timelines, available formats, applicable fees, and handling of exempt records.
- **Records Retention and Management Policy – Amended:** Updates District requirements for maintaining, preserving, retaining, and lawfully disposing of District records, including electronic records and District-related communications.
- **Privacy and Data Protection Policy – Amended:** Updates requirements for the collection, use, storage, protection, access, and lawful disclosure of personal information maintained by the District.



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- **Investment of District Funds Policy – Amended:** Updates the District's investment requirements and authorized practices to align with current law, District financial policies, and the District's priorities for safety, liquidity, and appropriate return.

HGCSD-specific policies are also expected to be brought forward during the next quarter, including a proposed policy addressing sewage pumps. Additional policies recommended for special districts by the California Special Districts Association (CSDA) continue to be reviewed for potential future adoption.

Billing & Collections Process Improvements

The District's billing and collection procedures were substantially reviewed during Q3. Invoice formatting and customer messaging were updated, recurring invoice configurations were reviewed with the Bookkeeper, and account statements were standardized to provide clearer balance information. Standardized collection templates were optimized for delinquent accounts, including 14-day, 7-day, and 2-day water-service discontinuation notices and associated customer and posting procedures.

Public Records Requests

The District experienced increased Public Records Act activity during Q3, including several requests involving financial and transaction records. Requests were completed within applicable response requirements. The increased activity also identified opportunities to improve centralized records organization and retrieval, which are being incorporated into the District's ongoing records-management work.

Customer Contact Verification & Database Redesign

The District continued a comprehensive redesign and verification of its customer contact records during Q3. Verification forms were distributed to District customers, returned information was reviewed and incorporated into the redesigned records system, and existing contact information was reconciled for accuracy. As of the end of the reporting period, 64 of 102 verification forms had been returned, representing approximately 63% of District accounts. The project will continue as outstanding forms are received.

Website & Digital Administration

Following the launch of the District's new Streamline website in June, Q3 focused on completing the transition of District information and public records to the new platform and refining the organization and accessibility of online information.

Work also continued toward securing an appropriate government domain for the District. The domain application process has been extended due to a requirement to submit a California government domain request in parallel and to provide additional historical District documentation. Some of the requested supporting records date to the District's formation era and predate the District's digital records. A review of the District's legacy paper archives is underway to identify and compile the specific historical documentation required for the application. The domain request will proceed once the required supporting documentation has been assembled.



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PROJECTS BY STATUS

Highlights only. Items reported under Topics of Interest are not repeated below. Routine administrative activities and full task details are reflected in monthly invoices.

IN PROGRESS:

Approved Contractor Contact List – Developing a centralized District vendor and contractor directory to provide current contact and service information and support continuity of District operations.

District Administrative Calendar – Developing a centralized calendar for recurring District obligations, compliance deadlines, meetings, reporting requirements, renewals, and other time-sensitive activities.

PROPOSED FOR Q4:

Google Workspace Implementation & Training – Following completion of the government-domain process, proceed with implementation of dedicated District email addresses and Google Workspace tools. Implementation is expected to include Board training and development of consistent practices for District email, calendars, shared documents, and records management.

Records & Archive Modernization – Develop a structured approach to the District's long-term physical and digital records following implementation of the updated Records Retention and Management Policy. The project is expected to include organization of existing digital records, phased digitization of historical records and maps, consolidation of physical archives, and development of a standardized structure supporting retention, retrieval, 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.

